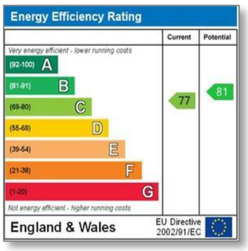

London Boroughs of Camden and Islington

Strategic Housing Market Assessment (SHMA)

Report of Fieldwork Findings

5th February 2016

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Stakeholder Engagement

1.1 Stakeholder Engagement Fieldwork was separated into the following strands:

» Fieldwork telephone interviews and written responses with stakeholders (39 responses);

» Duty to co-operate (22 responses).

Fieldwork Consultation with Stakeholders

1.2 PPG: Housing and economic development needs assessments revision says that local planning authorities need to work with[1]:

> *Local communities, partner organisations, Local Enterprise Partnerships, businesses and business representative organisations, universities and higher education establishments, house builders (including those specialising in older people's housing), parish and town councils, designated neighbourhood forums preparing neighbourhood plans and housing associations should be involved from the earliest stages of plan preparation, which includes the preparation of the evidence base in relation to development needs.*
>
> *PPG Paragraph 007 revision date: 20 03 2015*

1.3 As a result, this project included engagement with stakeholders using telephone interviews to a structured Topic Guide. This sought their views on various aspects of the current market, and these views informed the outputs of the SHMA study. Representatives of Neighbourhood Forums (NFs) were sought their views on their local area, the borough and the housing market through the use of multiple choice based questions with the ability to add their own or their Forums' views.

1.4 The fieldwork included the following stakeholders:

Stakeholder	Who
Housing providers and enablers	Local Registered Providers, Private Landlords, estate agents and SHMA partners authorities (Camden and Islington)
Developers/landowners	Key local and national house builders, landowners, planning agents and representative bodies
Specialist Groups	Community groups, support agencies & residents associations/neighbourhood forums
Businesses & business representatives	Key local employers and business representatives
Partner organisations	Key stakeholders e.g. universities
Duty to Co-operate	Neighbouring authorities

1.5 Under the Duty to Co-operate (D2C) both SHMA partner authorities (Camden and Islington) were interviewed together with the following: Barnet, Brent, City of London, Hackney, Haringey, Westminster and the North London Housing Partnership. Enfield were contacted but replied they did not have a view or any issues to raise relating to their Borough or Camden and Islington to add to the SHMA fieldwork.

1.6 The views expressed in this Section of the Report represent a balanced summary of the responses given by stakeholders. In some cases they reflect the views of the individual concerned, rather than the official policy

[1] http://planningguidance.planningportal.gov.uk/blog/guidance/housing-and-economic-development-needs-assessments/the-approach-to-assessing-need/ - paragraph_007

of their employer/organisation e.g. Neighbourhood Forums. In this Report, the abbreviation 'RPs' refers to registered providers of affordable housing. In most cases the registered providers are housing associations.

Stakeholder Views

General Perception of the Housing Market Area (HMA)

1.7 The consistent view given by those interviewed is that housing for sale and rent in the boroughs is less affordable compared to the majority of other boroughs in London. It was also said there is a shortage of all types and tenures of housing. Stakeholders believe the councils' housing registers reflects this market position. Greatest concern was expressed for those on benefits, or affected by the limitations of LHA and any low-average earners e.g. earning £30-60k; stakeholders considered them to be the 'squeezed middle'.

1.8 Stakeholders highlighted those working in the HMA are unlikely to be able to afford to live there and are likely to commute into Islington and Camden e.g. from Enfield, Barnet and outside of London e.g. Kent. There are concerns about the cost of commuting and commute times increasing as workers move further out; this affects work/life balance and the likely retention of staff.

1.9 It was said that there is greater ethnic diversity and social mix which brings added vibrancy to the boroughs. Stakeholders consider the areas to be good places to work and live because of connectivity/transport links, good primary and private schools, higher education facilities and employment opportunities.

1.10 Generally less positive views included the lack of infrastructure e.g. GP surgeries, the lack of housing (and affordability), the level of traffic and pollution, the volume of people, crime and ASB and the numbers of rough sleepers and sofa surfing (which is said to have increased), whilst support and advice services have been cut.

Specific Borough Perception

1.11 Stakeholders made a series of observations about how they see the local authority areas:

» **Camden**: Is said to have a village feel with a good offer of green space e.g. Hampstead Heath. The area is said to have good cultural facilities e.g. the British Museum. The Borough is spread across a diverse area ranging from the West End towards the City and out to Hampstead, providing both an urban and suburban environment. However, despite the area providing a range of leisure and cultural facilities, austerity measures have impacted on the local area and stakeholders raised concerns about the loss of community venues, support services and lack of investment to support local businesses. The primary and private education is considered excellent in the area, but there are no local secondary in some areas and quite young teenagers have to travel across London to school each day.

» Representatives of Neighbourhood Forums (NF) are either very satisfied or fairly satisfied with their neighbourhood area as a place to live. These preferences are because their areas are in convenient locations, have green spaces and shops. It was said the main reasons why people are attracted to live in NF areas is because of the sense of community and the convenient location. Shops were seen as a negative aspect because there are too many cafés and outlets for office workers rather than for residents e.g. hairdressers, butchers. The majority also said other negative aspects are housing affordability and housing selection. When asked how their neighbourhood area compares to other parts of the Borough the majority of representatives say they are slightly better.

» **Islington:** is said to have good connectivity to the rest of London and is likely to improve because of Crossrail. The Borough is said to be innovative and supportive of entrepreneurial business through innovation e.g. pop up markets. The Borough also has an emerging technology base. The area is said to have good support services especially for minority groups but there is limited access due to cuts in services. Although the area is said to have a cultural awareness and support for conservation areas, there is a lack of open green space and a lack of community action to influence services.

» Only one NF for Islington responded to the fieldwork. They reported that the majority of members of the NF are either fairly satisfied or very satisfied with their neighbourhood area as a place to live. These preferences are because their area is in a convenient location and has a sense of community. The main factor said to attract people to live in the NF area is the location. Less positive aspects of the NF area were considered to be not enough green spaces and the environment. When asked how their neighbourhood area compares to other parts of the Borough the majority of members would say they are slightly better.

The Housing Market and Current Supply of Housing

Borough Specifics

1.12 Stakeholders made a series of observations specific to each borough:

» **Camden: external stakeholders** said there is a good balance of property types and tenure in the Borough. The share of the Private Rent Sector (PRS) is seen to have risen, increasing population churn. The condition and security of tenure in PRS is of concern, together with the loss of social housing stock sold under Right to Buy/ Right to acquire (RTB/RTA) and subsequently let privately.

» There are said to be many properties that are empty and it was noted the Council spends a considerable amount of time and money in bringing them back into use.

» **Council stakeholders** are aware of a small amount of interest for self-build/custom build. It is looking at how it manages its own land assets.

» The Council expects to meet its current OAN for housing within its own boundaries, although meeting the OAN for affordable housing has and will be a challenge.

» The Council is not aware of any cross-boundary issues between it and neighbouring boroughs other than it is believed they share similar HMAs. Any migration is likely to be in relation to affordability especially within PRS and to be outwards from Camden to Haringey, Brent and Enfield.

» The Council believes that the boroughs around Central and North London are carrying out the duty to cooperate effectively.

» **Representatives of NFs** said their main concerns about housing in their areas are a lack of affordable housing, which is genuinely affordable, and affordability. The majority also consider there to be too little new housing development in both the Borough and the NF areas. The majority believe the types of property which should be given greatest priority on new developments in both the Borough and in their NF areas should be low cost homes to rent (e.g. Council and housing association homes). The next priority, of equal importance, is homes to buy at market price and low cost homes to buy. Priority client groups are seen as families and older people.

» **Islington: external stakeholders** said there is a predominance of social housing, the majority of which is 1 bedroom units. With over 19,000 on the Housing Register there is an acknowledged lack of supply.

» Rent and house prices have risen and there is increasing polarisation within the Borough. The area has high rates of people in receipt of sickness benefits and there are other indicators of deprivation including domestic violence. Few people on low-average incomes can afford to buy or rent privately; there has been an increase in overcrowding and it is common for 2 couples to share a 2 bedroom property in order to afford to live in the area.

- The amount of PRS has risen and tenants are likely to be young professionals and students and this has increased population churn. The lack of family housing generally means that families are less likely to live in the area.

  Council stakeholders said the Council is not proposing measures to deliver more private rented housing as they consider it a submarket of market housing and they do not currently have specific policies to promote it.

- The Council is not aware of demand for self-build/custom build as there are land constraints and values are high in the area.
- Council expects to meet its current OAN within its own boundaries, although meeting the need for affordable housing will be a challenge. The Council also expects to meet its need for specialist housing types.
- The Council believes that the boroughs around Central and North London are carrying out the duty to cooperate effectively.
- **NF Members** had a balance of views regarding the housing market in their area and there are no major concerns to highlight. In the main they believe the level of development in both the Borough and in their NF area is far too little. With regard to the types of property which should be built on new developments it was considered that low cost housing (Council and Housing Association) to rent and low cost homes to buy should be the priority and they should be smaller homes for younger individuals and couples and families are also a priority. They generally want to see more affordable housing developed. The majority of those who responded believe there are the same priorities in the Borough as there are in NF areas.

General Comments about the Housing Market in the Boroughs

1.13 Stakeholders are generally aware that the councils are endeavouring to have a balance in the housing market and some believe the councils have been prominent in lobbying for intermediate housing. There is a concern whether this is currently being sold/rented at truly affordable levels.

1.14 Some estate agents say the housing market is stagnant and is slowing down in the two boroughs. It is said this is because values are now too high and investors are less interested while those living locally, who wish to buy a larger property, are unable to afford to buy; this stymies the supply chain.

1.15 Estate agents say that property investment makes up a significant share of the market and this is still increasing, although it has slowed down. Some commented that in 20 years' time the majority of stock will be owned by landlords in the two boroughs.

1.16 Some stakeholders highlighted that councils have little control over the housing market and, despite local and national policy, housing is a free market. It was said that unless the councils' develop their own properties for all tenures or build with RPs they are unable to influence the cost of housing or the type/mix developed. It was also said councils will need to work in partnership with the PRS.

1.17 New build housing for sale is unlikely to be affordable and therefore won't be purchased by local people. Developers say the market dictates what is needed; new build properties are often seen as commodities for future investment yield rather than housing for local people; this can artificially drive up values.

1.18 There is concern that the level of social housing in both Camden and Islington is likely to reduce further due to the requirement to sell off high value properties and sales through RTB/RTA and receipts will not be enough to replace the units lost.

1.19 There is genuine concern the lack of housing available to middle income earners and the loss of social housing stock will result in the areas becoming more gentrified; the sense of community within each borough could be lost.

1.20 Some stakeholders raised issues regarding overcrowding including vulnerable clients sharing 1 bedroom units which are often substandard in order to be able to afford to rent in the areas.

1.21 Some said the housing market is overheated; landowners have increased hope value which increases competition for land.

1.22 Due to increased competition for land and land values, RPs are unable to compete with private developers and are unlikely to be able to develop themselves. RPs are likely to only develop social housing as part of a Section 106 Agreement.

1.23 Developing in regeneration areas is said to be more affordable but land prices are rising in both boroughs. Some developers are now avoiding particular areas as they are too expensive e.g. south part of Camden and Upper Street in Islington.

Current Supply

1.24 Regarding the current supply of housing, stakeholders highlighted the following issues:

» There is said to be an oversupply of low and high end housing and a lack of accommodation for middle earners both to rent and buy.

» There is an imbalance of genuinely "affordable" accommodation for people who wish to live and work in the boroughs especially relating to PRS and first-time buyers.

» There is said to be a lack of one and two bedroom properties to buy and to rent privately.

» Developers said that where there are new developments they provide a good mix in terms of type and tenure of housing to meet all demands, but density levels could and should be improved to increase supply.

» There are still opportunities for the development and letting of new purpose-built PRS in the boroughs as rents are high. However, this will impact on the supply of affordable housing. It was said there is a gap in the market for institutional investors to provide a good product, but there are concerns that units developed will be smaller and of poor quality.

» Some stakeholders also suggested that the level of PRS may remain stagnant or reduce because capital values are becoming unviable for landlords to make sufficient returns on investment.

» It was said that council policies have had a negative impact on the number of houses available for PRS in the areas. Council Landlord Licensing Schemes and Article 4 Directions are said to have increased costs for private landlords and these are passed onto tenants. This is having an impact on the amount and affordability of PRS in both areas.

» There is some concern about the rent cuts for social housing providers and their ability to invest in existing and new affordable/social rented homes.

» Neighbourhood forums raised concerns about the loss of green space to development. Other stakeholders have concerns over the lack of land for future development fearing this will constrain supply.

Current and Future Demand and Trends in the Housing Market

1.25 In terms of **housing demand within the boroughs** a range of issues were highlighted.

1.26 Demand from those wishing to buy is from young, single or couples for 1 and 2 bedroom units and larger houses to share; larger homes to buy by families are unaffordable.

1.27 Accommodation for sale or let above commercial units are less popular, but will still be let or sold if priced competitively as demand is so high.

1.28 Some demand for PRS is from students who wish to live close to their universities and young professionals; the demand is for 1 and 2 bedroom apartments or larger houses to share. Families living in PRS have increased over recent years, but this has slowed down because of rent and LHA levels.

1.29 Stakeholders say newly developed units are in demand and are often bought off-plan by foreign or UK investors and are sometimes left unoccupied. Investors are looking to purchase individual flats or small blocks of up to 10 flats. It was said that, in consequence, many developments are not helping to meet the demand for housing in the boroughs.

1.30 In terms of affordable housing there is demand for 1, 2 and 3+ homes for larger families where demand is high, but these are in short supply.

1.31 There is a huge demand for low cost homes to buy especially for 1 and 2 bedroom units. Where once the age demographic of buyers was aged 20-30, as house prices have increased the age profile has changed to those aged under 50.

1.32 Local employers interviewed say that some employees need to live close to their workplace and there is a lack of affordable accommodation; this has, and will continue to have, an impact on recruitment and retention of staff.

1.33 There is particular concern regarding professionals earning average earnings mentioned as being between £30-60k not being able to buy in the area and this will result in middle income earners moving away from this part of London. There is also a demand from employees for larger family houses to rent and buy, but these are unaffordable and families are moving out of the boroughs.

1.34 There is likely to be an increased demand for housing because of business growth e.g. The Francis Crick Institute, University College Hospital, Google, Expedia and Ticketmaster. The need is likely to be for those aged between 25-35 and earning below £50k. The type of accommodation thought to be needed is one and two bedroom homes or shared accommodation to rent privately at affordable levels. Some stakeholders said there is a need for more commercial units in the boroughs to meet business growth.

1.35 Local businesses/institutions say because housing affordability has an impact on recruitment and staff retention some have merged and central offices are being moved outside of London resulting in a loss of businesses, skills and employment opportunities within the boroughs.

1.36 There is said to be a demand for employment and living hubs in the area and mixed use developments are not supported by the councils.

1.37 Demand for accommodation from students is growing and landlords are keen to rent to them. One advantage of students is they are able to pay several months in advance. Landlords are known to evict PRS tenants in favour of students and in some cases this has resulted in homelessness.

1.38 There is a demand for Key-worker housing and there is additional demand from service areas not currently included within the Key-worker definition. It was suggested the definition needs to be extended to include support/service staff for local businesses and institutions without whom the area may struggle to function.

1.39 It was suggested that improved design and location of studio apartments could assist first-time buyers and older people in particular who currently have few housing options when they wish to downsize and/or require some level of support.

1.40 It was said there is a high demand for specialised retirement living and current demand is for self-contained 1, 2 and 3 bedroom apartments with leisure and support available.

1.41 Stakeholders have no evidence to suggest there is demand from self builders/customer builders and it was generally felt that land values are too high for such initiatives to be viable in the boroughs.

1.42 There is a demand for specialist housing e.g. for Lesbian, Gay, Bisexual and Transgender (LGBT) clients for 1 and 2 bed studio apartments in clusters.

1.43 Stakeholders have little evidence to suggest there is demand from service families in the boroughs.

Trends in the Housing Market

1.44 The following **general housing market trends** were highlighted:

- Due to the cost of all forms of housing residents are choosing, in some cases, between paying their housing costs and other outgoings such as food; this has seen an increase in the use of food banks in the area. Some agencies reported that vulnerable clients in particular are struggling financially and there are reports of young people seeking support because of malnutrition.
- There is also a trend for larger properties to be used by sharers rather and families.
- There is evidence of commercial properties being converted to residential.

1.45 The following owner occupier trends were highlighted:

- Access to any form of housing is difficult, especially for those on low-average incomes (£30-60k).
- Income levels have not gone up to match the increase in property prices affecting the ability to procure a mortgage.
- The boroughs are becoming gentrified, although less so than some other boroughs e.g. Chelsea.
- There is an increased age of buyers. First time buyers are often assisted by parents. Older people are moving back into the area having brought up their families outside of London.
- Raising a deposit is the biggest hurdle for first time buyers. It is often the case that once they have saved enough, house prices have increased.
- Because of the cost of housing it is not uncommon for two couples to buy a 2 bedroom property to share or studio flats being occupied by more than one person.

1.46 The following **PRS market trends** were highlighted:

- PRS rents are increasing and demand is high, therefore landlords are charging as much as they can. It is said that poor quality accommodation is not reflected in the levels of rent expected.
- Stakeholders say the sub-division of housing (where rooms are being split into two and living rooms converted to bedrooms in order to maximise rental income) is becoming commonplace.
- 3 bedroom properties are hard to let unless shared; families are unable to afford the rent charged.
- PRS landlords are unlikely to rent to those on benefits because of LHA levels.

- Students are more likely to move into PRS where student accommodation is in short supply. Conversion to student HMOs reduces council revenue e.g. students can apply for council tax exemptions.
- As demand for accommodation from students is growing, landlords have been known to evict PRS tenants in favour of students and in some cases this has resulted in homelessness.
- With regard to recent government changes to HMO regulations, some stakeholders expect local landlords may wish to sell their properties rather than comply with the changes.
- There is an increase in Build to Rent which is likely to rise as this provides a longer term income stream as opposed to developers selling off plan, although some highlighted Build to Rent was less viable in Zones 1 and 2.

1.47 The following **affordable market trends** were highlighted:

- Local people who cannot afford to live in the area have two options - move out of the boroughs or apply for council housing; this is said to have increased housing registers.
- There are affordable housing viability issues relating to the lack of grants, land costs and scheme complexity. RPs are beginning to operate as private developers by building to sell or rent at affordable levels rather than develop social housing; in some cases they are developing housing for sale at full market value to cross subsidise other tenures including shared ownership.
- The majority of RPs interviewed access the Mayor's Housing Covenant Programme but some said the grant rates should be improved and there is too much bureaucracy for the level of grant received. Some RPs say the GLA has been flexible e.g. changing tenures to improve affordability following changes in legislation.
- Those looking to purchase low cost homes for sale are struggling financially with regard to raising a deposit, but it is hoped with recent government initiatives (e.g. Help to Buy) may aid first time buyers into ownership.

Constraints on Supply

1.48 The following challenges were highlighted as **constraints in the supply of housing**:

- Stakeholders say that key constraints are land availability, lack of land with suitable planning permission, increasing land and build costs and a lack of skilled construction workers.
- Raising finance and borrowing opportunities are limiting opportunities for both PRS investment and development.
- Unrealistic Section 106 Agreements were said to be an obstacle.
- The planning processes operated by both councils are said to be time consuming and delays in planning hearings are of particular concern. Where developers and/or RPs borrow, even a small delay can cost businesses large amounts of money and result in schemes becoming unviable.
- In Islington it was also highlighted that the Council does not support affordable rents (new schemes for rent are to be let at traditional social rents) which presents challenges for RPs to make new developments financially viable.
- Some stakeholders said there is a need for council leaders/officers to be better educated with regards scheme viability and there are issues around their understanding of Build to Rent and how this would meet their current policies. It is said the councils' affordable housing policies lack definition and clarity regarding the level of affordable housing contributions as a % of PRS development.

» Scheme viability will be affected where land values are lower because of the cost of reclaiming contaminated land. This is compounded when house value outturns are lower for developers.

» Council policies relating to PRS, including additional licensing and Article 4 Directions, are pushing investors away, increasing rents and making PRS unaffordable to local people.

» Developers recognise the need for affordable housing especially family sized units (3+ bedrooms) but this is not possible because of viability. In addition to this RPs say that the Benefit Cap means that families in receipt of benefits cannot afford 3+ units.

» Most developers see the provision of affordable housing as a drag on scheme viability.

» There are restrictions on where student accommodation can be developed in the boroughs and this limits supply. The development of specific student accommodation would free-up PRS in the boroughs.

» There is demand for further student hubs in the form of cluster units; however the current constrictive planning policies and viability e.g. Section 106 contributions, CIL and land values, constrain supply.

Affordable and Specialist Housing

1.49 With regard to **affordable housing** the following **borough specific** comments were made:

» **Camden:** the greatest demand is for 2 bedroom 4 person accommodation but there is a lack of supply. New build 3+ bedroom affordable housing is unviable.

» To make better use of existing social housing stock, and ensure properties are let to those most in need, the Council will be introducing a new allocations scheme and there will be a review of the Housing Register.

» To increase housing supply the Council has its own Community Investment Programme (CIP) and is building c.3k new homes; 300 of the new homes are currently outlined for shared ownership. This is thought to now be unviable and the mix of tenures will be reviewed.

» **Islington:** There is predominance of social housing in the area but a lack of supply. The greatest demand is for 2 bedroom accommodation and family housing (3+ bedrooms). Larger units are unlikely to be developed in the area as they are not viable.

1.50 The following **general points were made about affordable housing** in the boroughs:

» All RPs interviewed wish to develop in the area but lack opportunities. Viability is a key issue. Some RPs reported they will need to increase their range of products e.g. open market sale and Build to Rent. Developing intermediate housing e.g. shared ownership, is becoming unviable. Should there be the opportunity some RPs are looking to develop new purpose built private rented housing in the boroughs. (However, these forms of tenure are unlikely to address local need because rent levels will be above the LHA).

» The lack of capital funding from the GLA/HCA together with the impact of scheme viability for developers means they are unlikely to increase the number of affordable housing units. RPs say they are willing to develop 1 and 2 bedroom units but developing 3+ bedroom units is unviable and developing schemes for social rent is a challenge. The only way to develop larger affordable housing on Section 106 developments is to try to gain grant funding or increase the % of intermediate tenures.

» Some RPs have reduced their development programmes due to the lack of grants and other issues that affect viability e.g. land values.

» RP social/affordable housing stock is forecast to decrease (new RTB). It seems likely that for some RP's intermediate housing will make up the majority of stock. Their tenant demographic is likely to change from those in receipt of benefits to those working on low to middle incomes. This change is likely to affect the way RPs project themselves and how they deliver customer services as customer expectations are likely to increase.

» Shared ownership is becoming more unaffordable and applicants need to earn around £40k p.a. Some RPs considered shared ownership more affordable than privately renting a similar sized unit in the area.

» RPs raised concerns over the Government's approach to affordable housing definitions and the impact this will have on future provision e.g. developers are likely to build starter homes as part of Section 106 contributions.

» The majority of RPs confirmed that the units they sell are to local people or those living in nearby boroughs but working in Camden and Islington, but less restrictive policies could be useful e.g. applied only for a short timescale e.g. 2 months.

» It was said that it was not unreasonable for there to be a local connection criteria although sometimes there are issues; there isn't one 'local connection' policy that covers London, each borough has their own policy which can have unintended consequences.

» There is some concern at RP rents; RPs new schemes and re-lets are at higher affordable rent levels;

» Some RP's reported there is a low turn-over of tenancies each year e.g. less than 5% of stock. Islington Council said they had seen a decline in tenant turnover. In 2013-14 there were 1500 changes of tenancy whilst last year (2014-15) the combined turnover of RP and Council tenancies was 1200 meaning that of the 19,000 on the Housing Register 6% were housed;[2] RPs in the main provided little detail on the number of properties vacated in each borough and how many were subsequently occupied through exchanges or let to new tenants.

» There does not appear to be any immediate concerns over the possibility of an increase in RTB/RTA as stakeholders have undertaken risk assessments. It is also believed that because of high house prices, even with a discount, many tenants will be unable to afford to buy.

» The majority of RPs reported they had not experienced any impact from Benefit Reform and some stakeholders highlighted they had implemented plans to mitigate any risks to both their business and tenants. However, some RPs said there had been an increase in demand for support; families living in larger units are struggling to pay their rent especially if they are on Benefits as a result of the Benefit Cap and there has been an increase in tenants taking up high street lending from companies such as Wonga.

» Some RPs are working in partnership with the councils and discretionary housing claimants to resolve issues relating to reform. So far Universal Tax Credits have not been introduced so they are unsure as to how their tenants or their business will be affected.

» Some RPs reported that between 45-65% of their tenants living in the boroughs are in receipt of some level of benefits.

» RPs access Disabled Facilities Grants (DFGs) where appropriate and in some cases have substantial investment programmes to improve stock to meet the needs of tenants. Some reported that adaptation levels are static.

[2] This figure includes transfers but not mutual exchanges.

- RPs provided little information regarding the sale or conversion of properties for different purposes. The general impression is that RPs sell or convert very few properties per year and would only do so if modernisation/maintenance becomes unviable. There may be a suggestion that a small number of units in Camden have been changed from general needs to move on accommodation.

Gypsy, Travellers and Travelling Showpeople

1.51 In relation to **Gypsies, Travellers and Travelling Showpeople** no specific issues were raised. Boroughs confirmed the following:

- **Barnet** – The Council's last GTAA was undertaken in 2009; little need for pitches was evidenced and the Council has no future plans to repeat the exercise.
- **Brent** – Some research regarding the needs of Gypsies, Travellers and Travelling Showpeople were included in the Council's SHMA yet to be published, but it is unlikely that future provision will be made following recent announcements made by government.
- **Camden –** Camden undertook a GTANA in 2014 which evidenced a need for 16 additional pitches to 2031. Further site investigation/identification work will indicate whether meeting needs can be delivered through obtaining permissions and/or as part of review of the adopted Site Allocations DPD.
- **City of London** – The City has not undertaken a GTAA and is unlikely to carry out an Assessment because of the lack of land for sites.
- **Hackney** – Gypsies, Travellers and Travelling Showpeople were included in the Council's SHMA undertaken by ORS in 2015. The estimated is an overall 10-15 year need for 76 pitches which included some demand from those currently living in bricks and mortar. Due to proposed changes to the definition the estimated need may require reanalysis.
- **Haringey** - ORS have recently undertaken a GTAA which has yet to be published.
- **Islington –** Islington has no sites in the Borough. As far as is known there are no Travelling Showpeople yards, sites with temporary planning permission or unauthorised developments in Islington. Islington relies on the London Boroughs' Gypsy and Traveller Accommodation Assessment 2008. The Council confirmed there is no need for pitches in the Islington area.
- **Westminster** – There are not known to be any Gypsies, Travellers and Travelling Showpeople living on sites in the Borough and no GTAA has been undertaken.
- **North London Housing Partnership** – no GTAA has been undertaken since the London wide Assessment published in 2009.

Specialist Housing

1.52 In relation to **specialist housing**, interviews were undertaken with stakeholders who either provide housing and/or provide (or commission support) for the following client groups: older people, homeless, students, physically and/or mentally impaired, learning disabilities/profound learning disabilities and Lesbian, Gay, Bisexual and Transgender (LGBT). The following specific observations were made:

- **Camden:** In terms of **older people** Camden has an Adult Social Care (ASC) older Person's Strategy and they are hopeful to meet the needs of older people in the Borough, as there is considerable provision of specialist sheltered housing for rent.
- However, there is less choice for older people who are owner occupiers. Owner occupiers are often asset rich, but cash poor. Some said it is unclear whether owner occupiers are eligible for sheltered

housing and the choices available to those who wish to purchase and downsize to release equity is limited; an increased supply of purpose built private leasehold accommodation was suggested.

» It was said that the number of units for sheltered housing in Camden is decreasing due to changes in the Council's approach. It was said that in some sheltered housing blocks the Council is undertaking refurbishments to make units more accessible and studio flats and shared accommodation, once hard to let, have been reconfigured to self-contained units.

» Some stakeholders highlighted that even where there are one or two steps the Council has decided that unless a unit is totally accessible it can no longer be considered sheltered housing. Conversely, it was also said that some older people can physically manage a few steps and the units should remain categorised as sheltered housing stock.

» There is an emerging market for owner occupation for older people.

» The Council is keen to house people with **specific needs** (e.g. learning disabilities) in the Borough, as in the past care homes outside of the Borough have been used.

» The number of **households living in temporary accommodation** has reduced over the years. This is because the Council has a number of hostels and initiatives such as the Young People's Pathway which is designed to reduce and prevent homelessness and to improve the life chances of 16 and 17 year olds, care leavers and other vulnerable young people.

1.53 **Islington:** There has also been an increase in homelessness and particularly those who are considered older.

» The Council has a floating support service for those living in general needs housing and have developed a successful learning difficulties housing programme.

» Some RPs confirmed they are working with the Council on a number of schemes to convert general needs housing into dispersed supported housing in the community rather than develop specific schemes for people with care needs.

» Islington is said to offer 17 supported housing units for young (under 25) LGBT. There are a number of services, sources of support and activities that LGBT Islington residents can access.

1.54 The following general points were made about specialist housing:

» There is a general concern about the future provision of **specialist housing** both in terms of new development viability and the revenue funding of on-going care and support contracts. It was said ASC often lack the understanding that RPs need to invest in their stock and specialist housing is expensive to manage, maintain and invest in the quality of service required. There is also concern regarding how specialist housing will stack up in the future with the -1% rent reduction (if this is applied).

» The lack of supply of social housing 2 bedroom properties in both boroughs means that **older people** over-occupying larger properties can only move to 1 bedroom properties; it is unlikely they will do so through choice. This results in a lack of supply of larger properties in the social housing sector which is also in demand.

» Some private developers specialise in retirement living. It was said there is high demand for specialised retirement living and current demand is for self-contained 1, 2 and 3 bedroom apartments. Retirement living developments include leisure and wellbeing services with a team of people to support residents for which owners pay a service charge.

» It was said that older owner occupiers require support to find suitable accommodation when waiting to be discharged from hospital.

» Self-funders living in supported housing are struggling financially especially with regard to service charges. Some RPs no longer subsidise service charges and look for full cost recovery.

» It was mentioned that where older people are living in social housing blocks of flats some have been sold under the RTB/RTA there is population churn resulting in a lack of community; older people are becoming marginalised.

» The fact that older people may be marginalised was said to be further impacted upon by the loss of family support because family members are moving away from the area to seek more affordable accommodation outside of the boroughs.

» Older people living in PRS, who have regulated tenancies, may live with carers/relatives who care for them. Should the older person need to move into sheltered housing, the landlord looks to raise the rent on the potential change of tenancy. This often is unaffordable and the relative/carer has to seek alternative accommodation. Because of the lack of affordable PRS in the boroughs carers/relatives are delaying access to sheltered housing for the older person whilst they resolve their accommodation issues.

Other Groups

» Clients are requiring increasing advice with regard to the effects of the Spare Room Subsidy (“bedroom” tax) and some are accessing discretionary housing payments.

» There is concern over the level of homelessness in the two boroughs which is often caused by the loss of PRS, family/relative breakdown and Domestic Violence (DV).

» There is awareness that because of the lack and cost of providing temporary accommodation within the PRS, councils are using accommodation outside of their boroughs and in some cases outside of London.

» Young people living in hostel/move-on accommodation often experience difficulties in moving into rental. This is because they pay rent on their current supported accommodation, which is often unaffordable, and are unable to save for a deposit and a month’s rent.

» Several councils have signed up to a London-wide Protocol where all boroughs have agreed maximum prices for temporary accommodation in each area so that councils do not outbid each other and increase competition.

» It was stated that are issues for those with mental health problems who are experiencing difficulties in accessing benefits, being sanctioned (i.e. failing to comply with all the conditions of receiving benefits) and benefits are being denied.

» Some RPs reported that vulnerable clients claiming Employment and Support Allowance (ESA) need to undertake a Work Capability Assessment (WCA). This often leads to their claim being withdrawn and RPs are spending a lot of time appealing against the decisions for their clients.

» Those with a physical disability are also experiencing difficulties and seeking advice regarding accessibility to their homes in the form of aids and adaptations. These issues often relate to:
  - the need to move because of new or deteriorating physicality, or private landlords do not wish for adaptations to be undertaken;
  - maintenance of existing equipment or
  - they require an assessment to find out what their needs may be.

» It is said there is a lack of advice, support and funding for those with a physical disability.

» It was said that developing accommodation for those who are physically disabled is not possible as some clients require car parking space which is often not an option in central London.

» Some stakeholders mentioned that the sorts of clients have changed over recent years. For example, people who would have had a support service a few years ago would not now be eligible, and those that are have higher needs.

» Stakeholders said there is a lack of housing available for key-workers and many who work in the boroughs live further out and commute to work. Those that do live in the boroughs are likely to live in social housing but are then unable to progress to owner occupation as there is a lack of starter homes available to first time buyers in the areas.

» One of the most vulnerable groups are said to be those who are LGBT and there are less options for those who are over 25 and/or those who have additional needs e.g. living with HIV or going through transition. Although Islington is said to offer 17 supported housing units for young (under 25) LGBT clients there is little available for those over 25 and most boroughs, including Camden provide no support or accommodation.

» One of the issues highlighted for LGBT clients is their need for privacy. However, most have little option but to sofa surf or rent privately in an HMO which is often unaffordable and unsafe. In addition to this many of the community spaces which have been traditionally used by LGBT groups (e.g. The Black Cap in Camden) have closed. This has resulted in an increased usage of the few support groups that remain and people feeling isolated and even more marginalised.

Students

» In relation to student accommodation it was said that Camden and Islington are two boroughs where higher education establishments are located and this increases the need for accommodation as it is known that students wish to live nearby to their place of study. There is a predominance of students in Islington who are said to either live in expensive bespoke student blocks or live in shared PRS accommodation which is often of poor quality.

» It was said there is a lack of PRS in the boroughs but if more specific student accommodation were to be developed this would relieve the pressure on PRS for local people. It was also said there is a lack of social housing and PRS available to university employees.

» The amount of PRS let to students is said to be increasing, but they are mature students with parents acting as guarantor. There is an affordability issue for students when dealing with private agents who charge handling fees in addition to deposits and rent. Students whose parents earn over £40k are unable to access the same grant support and for them affordability is a greater issue.

» University/student housing providers confirmed there is a mix of students ranging from first year to post graduate with a mix of UK based and overseas students. Some interviewed confirmed that in recent years the sorts of students renting in the area had changed and there has been a higher % of overseas students coming to study in London.

» Universities interviewed confirmed that the number of students requiring accommodation was likely to increase year on year. To a certain extent this is a result of institutions needing to increase income by accepting more overseas students who pay higher fees.

» Providers of student accommodation said that there is demand for further student hubs in the form of cluster units however the current constrictive planning policies and viability e.g. affordable housing contributions, CIL etc., were likely to constrain supply. Providers of student accommodation are more likely to want to develop cluster units than studio apartments as these have proven to be more affordable.

Neighbouring Authorities and Cross Boundary Issues

1.55 Neighbouring authorities said the greatest challenges posed by the housing market around their areas are:

» Increase in house prices and rents and wage earnings stagnating = affordability;

» Lack of grant funding;

» Increase in population and therefore demand for housing;

» Lack of housing supply especially affordable housing and the use of temporary accommodation in outer or outside of London;

» Increase in land values, lack of space and competition for land uses;

» Negotiating Section 106 Agreements e.g. infrastructure v affordable housing contributions.

1.56 The main things that neighbouring authorities think national and local government could do to tackle the above challenges are:

» National government should do more to support and fund council housing obligations including housing homeless people and the building of new homes, especially affordable housing. New legislation e.g. starter homes will not help those most in need.

» Clearly setting out the approach of how housing can be delivered, robust and transparent viability assessments and what the requirements are for affordable housing, including design and density standards required on a site by site basis if possible.

» To ensure that a proportion of any supply of housing is genuinely affordable by using innovative intermediate tenures and ensuring there is an element retained for social rent.

» Further PRS regulation aimed at rogue and amateur landlords but supports and rewards for good landlords.

» Effective consultation with local communities to gain support for regeneration of Brownfield and/or existing residential estates.

» Implementation of rent controls so that people can afford to rent in central London.

» To ensure there is a balance in the housing market including for those who are said to be the "squeezed" middle.

» A slowdown in the level of government changes in legislation as developers are waiting to see what the next change will be; this is likely to increase profits but slows down the supply of housing.

1.57 The following neighbouring authorities have undertaken SHMAs since the NPPF was published in March 2012:

» **Barnet** – A SHMA was undertaken as part of the Housing Strategy and was published in 2014. The research identified 27,350 new homes would be required in Barnet over the next 10 years. The majority of Barnet's growth will be focussed on Brent Cross/Cricklewood, Colindale, and Mill Hill East, where there is capacity to deliver 20,000 new homes by 2029. However, meeting the identified need within the Council's area will be a challenge and the Council will need to increase density levels and/or build on the green belt or build affordable housing (either temporary or social) elsewhere using their Housing Revenue account.

» One of the priorities for the Council is to look to provide some purpose built PRS at LHA rates.

» The annualised outputs from the Housing Needs Assessment (HNA) are summarised in the following table:[3]

	1 bed	2 beds	2 beds shared	3 beds	3 beds shared	4 beds	Total	%
Total Requirement	831	456	786	277	224	161	2735	
Market for Sale	241	79	400	33	144	13	910	33%
Intermediate Ownership	364	193	231	119	56	58	1020	37%
Market Rent	79	102	86	67	12	50	396	14%
Affordable rent	148	82	69	58	13	39	410	15%
%	31%	17%	29%	10%	8%	6%		

» All new homes will meet the lifetime homes standard so they are suitable for people with limited mobility, and many of the new properties will be close to transport and local amenities. New wheelchair accessible homes will be provided through the Council's own development pipeline and in private developments.

» The number of older residents in Barnet is expected to increase and the Council aims to ensure there is a variety of housing options to meet the needs of older people, including specialist supported housing which is integrated with local facilities through a hub and bespoke approach.

» The Council are currently reviewing their Affordable Housing SPD.

» Housing developers generally suggest a property mix and tenure which will meet the current assessment of need and the planning policies the Council pursue are fit for purpose.

» There is little demand from self-build/custom build in the area.

» **Brent** – The Council has recently undertaken a SHMA but it has yet to be published (ORS). Until the report is published it is not possible to report the findings.

» Developers operating in Brent do not usually suggest a property mix and tenure to meet the needs the Council believes there are in the area. Levels have to be negotiated to achieve results close to the Council's policy targets (50%). Getting levels to policy targets is said to becoming increasingly difficult in light of recent changes to the affordable housing definition and the Council's policies are likely to be reviewed.

» The Council is currently meeting its OAN within its own boundaries but this is an increasing challenge because of the costs of development, the changes in the definition of affordable housing especially in relation to the intermediate market and the cost of providing social housing.

» The Council has signed up to the GLA's register for self-build/custom builders and believes there is low demand.

» **City of London** – The Council have recently commissioned a SHMA.

» Housing developers generally suggest a mix and tenure to meet the needs currently identified for housing in the area and the Council's current policies address all elements of housing demand in the Borough.

» The Council will shortly undertake an SHMA but expects to meet its OAN because windfall sites are currently meeting the needs assessed outside the authority. The Corporation owns housing estates outside the City so much of the OAN will not be within the Corporation's own boundaries.

[3] Barnet Housing Strategy 2015-2025, Barnet Council 2014

» **Hackney –** ORS undertook the Council's SHMA in parallel with Tower Hamlets; findings were produced separately for each authority[4]. The Council also undertook a separate Housing Needs Survey (HNS).

» The need and housing tenure mix for Hackney 2011-2035 is shown in the table below:[5] (Note: Figures may not sum due to rounding)

Housing Type	Number of dwellings
Market housing	11,800
Intermediate affordable housing	2,500
Social rented housing	27,800
Total Housing Requirement	42,200
Market housing	28.0%
Intermediate affordable housing	6.0%
Social rented housing	66.0%

» Although Hackney is unlikely to meet its OAN within its own boundaries because their HMA is contiguous with Tower Hamlets and there is combined overall capacity to meet the needs identified, although meeting the need for affordable housing is likely to be a challenge. In common with other boroughs there is a crisis in finding temporary accommodation and this is more affordable outside of the Borough, but the Council is not at this time building or acquiring buildings outside of the Borough for permanent housing.

» The Council is exploring delivery options with regard to specialist housing.

» Housing developers do not always suggest a property mix and tenure to meet the needs identified in the area, they typically suggest smaller units. There is also a drive by developers to cater for tech city workers in mixed use PRS rather than owner occupation or affordable rent. However, the Council looks to negotiate a balance of mix and type to meet the needs identified.

» The Council is one of the top 3 performing councils in the country for affordable housing delivery. The Council is currently considering measures to deliver more PRS housing in the area but a key consideration will be affordability.

» There does not appear to be any demand for self-build/custom build within the Borough.

» The current planning policies are said to adequately address all elements of housing demand to an extent, and there is a new Development Management Local Plan (DMLP). It is said there will be the need to review planning and affordable housing policies in light of developer proposals and changes to government legislation.

» **Haringey** – The Council undertook its own SHMA in 2014[6] . Haringey is said to have the strongest migration relationships, either in part or as a whole, with Barnet, Camden, Enfield, Hackney and Islington and therefore a wider housing market area was identified.

» The SHMA evidenced a total net housing requirement for all tenures as 20,172 of which 11,757 are for affordable homes. The greatest demand is for 1 and 2 bedroom properties in all tenures and larger affordable homes.

» The Council is expected to meet all needs within its own boundaries including affordable housing.

[4] London Borough of Hackney SHMA 2014, ORS March 2015 http://www.hackney.gov.uk/Assets/Documents/2015-05-13-Hackney-SHMA-FINAL-Report.pdf
[5] Source: http://www.hackney.gov.uk/Assets/Documents/2015-05-13-Hackney-SHMA-FINAL-Report.pdf
[6] London Borough of Haringey SHMA, May 2014, GVA http://www.haringey.gov.uk/sites/haringeygovuk/files/strategic_housing_market_assessment.pdf

- The SHMA highlighted the number of individuals with a learning disability which is set to rise and the Council is taking careful consideration at a strategic level as to how to meet this need.
- Developers generally suggest a mix of 1 and 2 bedroom units, and affordable family housing is hard to negotiate.
- The Council's current planning policies are thought to adequately address all elements of housing demand. Due to recent changes in legislation the Council is currently reviewing its planning and affordable housing policies.
- The Council is aware of limited demand for self-build/custom build and these are referred to the GLA self build register.
- **Westminster** – The Council undertook a SHMA last year[7]. A target delivering of 1,068 additional housing units per annum was proposed and although believed to be a challenge, was not a lot more than had been delivered over the medium term in the City. If the 1,068 per annum target is to be achieved, it would deliver around 255 new affordable homes per annum, broken down roughly into 195 social/affordable rent homes and 60 intermediate tenure homes. The Council is looking to expand the amount of PRS on some schemes.
- The Council expects to meet its OAN for housing within its own boundaries, but is unlikely to meet the need for affordable tenures. The Council will continue to meet its housing duty for homeless households outside of the Borough. No information is available regarding the need for specialist housing types. The Council will take a strategic view once government policy changes are determined.
- With regard to demand for self-build/custom build this has not had impact on housing need in the area.
- **North London Housing Partnership** – The North London Partnership covers Barnet, Camden, Enfield, Hackney, Haringey, Islington and Westminster. The Partnership has not published its own SHMA since 2010, although the councils have done so either on their own or jointly with other boroughs.
- The Partnership is aware there are significant issues regarding the use of temporary accommodation across London and many are seeking accommodation outside of London because of a lack of supply and the high rents charged by private landlords.

1.58 Neighbouring authorities believe the boroughs around Central and North London are carrying out the Duty to Co-operate effectively and as some of the boroughs have undertaken their SHMAs there has been communication in relation to those.

1.59 No cross-boundary issues affecting neighbouring authorities were identified other than people moving in and out of boroughs seeking more affordable accommodation e.g. Islington to Hackney. There were no problems raised regarding housing supply or planning in Camden and Islington which could be adding to the pressure for housing in other boroughs. A general comment was made that there is significant pressure on supported and specialist housing e.g. homelessness and rough sleepers and if services are closed they will gravitate towards central London.

1.60 The following neighbouring authorities have had discussions or correspondence with Camden and Islington in the last 12-18 months regarding specific planning schemes and sharing best practice:

- Barnet;
- Hackney: Living in Hackney Scrutiny Committee;

[7] Westminster Housing Market Analysis, December 2014, Wessex Economics Ltd
http://transact.westminster.gov.uk/docstores/publications_store/WHMA%20Summary%20ReportFINAL.pdf

» Haringey have had discussions with Camden and Islington regarding delivery of housing;

» Westminster.

1.61 Joint housing and/or planning groups or partnerships attended by neighbouring authorities are:

» The North London Housing Partnership;

» West London Housing Directors' Group;

» Islington Viability Group;

» GLA and housing and planning related sub-groups;

» East London Housing Partnership.

Influencing Change to Improve Housing Delivery

1.62 Stakeholders said that the main things national and local government could do to support them in their work are:

» The planning processes for both councils need to be quicker and more flexible and their housing and planning policies reviewed more regularly as there is less ability to react to market changes.

» Having generic policies London-wide which are consistent with GLA policies would make delivery quicker.

» The two boroughs could plan strategically together and give support to bring more intermediate housing across their joint areas. If more boroughs worked together to resolve common challenges partners would see more interesting solutions coming to the market.

» Councils should procure land which is not being developed and retain this for affordable housing for local people.

» Councils should take into account their planning policies for affordable housing when valuing sites. It was said that in general council departments often work in silos; for example where councils are selling land at the same value to developers as to RPs.

» The councils need to be more realistic about CIL and the level of affordable housing contributions on Section 106 developments. It was said unless councils are flexible, affordable and specialist housing would not be viable.

» It was said that the councils could increase housing supply to meet unmet demand by accepting applications that are proposing new initiatives and high density developments.

» Some stakeholders believe the government should redistribute CIL contributions over a national rather than local level to improve viability.

» It was suggested that the councils need to work in partnership on an infrastructure strategy in order to plan in the long-term.

» Businesses that develop commercial and/or convert commercial to residential units believe that the councils could support them by helping local residents to better understand why development is necessary to provide a balance within communities. It was suggested that local opposition is often organised by local groups' who are able to delay or prevent planning and is often due to NIMBYism.

» Stakeholders highlighted that the lack of land acts as a constraint to supply. It was suggested that the councils should work in partnership with public bodies e.g. NHS to unlock land potential.

- Central government need to better resource council planning departments and the construction industry especially with regard to financing and supporting apprenticeship schemes.
- National government needs to support RPs as recent changes in policy appear to weaken their core principals which are to provide social housing. Due to the lack of grant funding RPs need to build accommodation for sale and intermediate tenures, when viable, to cross subsidize the social housing element.
- There are restrictions on the use of Capital Receipts which need to be lifted in order that councils can build more homes.
- Councils need to understand that the PRS is made up of many small businesses and is not one organisation. These businesses provide much needed accommodation and many are good landlords which the councils' need to support, rather than penalise.
- The councils could make it easier to convert listed properties and where commercial properties require modernisation in conservation areas.
- The councils could relax planning regulations to allow landlords to maximise letting potential e.g. if a box room could be considered big enough to let or by changing a living room to a bedroom. It was said that by maximising space more people could be accommodated and this could potentially decrease rents.
- Where councils fund voluntary agencies they have changed the way they pay from an annual grant to a person per day amount. This means that there are fluctuations in income resulting in organisations being unable to plan support. Some voluntary agencies say they are spending more time on fund raising than they are supporting people.
- There are concerns over the level and type of accommodation needed for older people both now and in the future. It was said needs are not being identified in local plans and councils should identify land supplies and use some of the powers set out by the CLG; this would encourage development for older peoples' accommodation.
- The key-worker definition should be extended to include support/service staff for local businesses and institutions without whom the area may struggle to function.
- Local higher education institutions would welcome support from the planning authorities when developing halls of residence or cluster units for their students. Universities in the area are looking to expand and further development of such facilities will reduce the pressure on PRS in the boroughs. Some universities suggested they would like to work with partnering organisations such as RPs where they can enter into direct nomination agreements with rents set at 20% below market rate.
- Small and medium enterprises (SMEs) provide employment; to support them both boroughs should look to provide a range of PRS products (which could include affordable employment workspaces/hubs). Some stakeholders suggested there is demand for accommodation which was less focused on space/tenure and more about well-designed affordable units created for both work and living.
- It was suggested that the councils should work in partnership with local businesses in order to raise finance to build accommodation for local institutions and businesses to ensure there are continued employment prospects and staff recruitment is maintained.
- The councils could lead London boroughs on accommodation and support solutions for those who are considered vulnerable e.g. LGBT whose needs are currently not being met.
- The councils should give local community groups and organisations more input into the Local Plan in order they can gain influence over decisions.

» National and local government need to promote the private and affordable housing sectors as aspirational choices as there needs to be a cultural shift from owner occupation.

» It was said national government should rationalise their policies so that affordable housing is provided by the state and CIL could help fund this. Affordable housing being a social dilemma should be solved by the state, not by the private sector.

» Businesses and institutions who have concerns for staff being able to afford to live and work in the boroughs suggested that properties in public ownership could be used for housing on license for periods of a year and let to employees who are working in local businesses and essential services.

» National government needs to improve legislation to strengthen tenant powers in order that they can influence and have a voice to improve PRS housing at both a local and national level.

Key Themes

1.63 The following paragraphs set out the key themes which emerged from the Fieldwork.

1.64 The councils should continue to work in partnership with key stakeholders to smooth the planning process and deliver new homes.

1.65 Delivery of affordable housing is becoming more challenging and complex and there is a need for closer working between the councils and registered providers.

1.66 Foreign investment and absentee landlords are of concern and would benefit from further research in order to better understand the issue.

1.67 The specialist needs of specific household groups (e.g. older people, LGBT) would benefit from a London wide approach to find housing solutions and benefit from local research to identify current and future need. This may also be an opportunity to improve the evidence base regarding existing specialist housing stock, including stock that has been adapted.

1.68 A review affordable housing policy would be timely, especially in relation to the % of affordable housing contributions on Build to Rent development. Where the Council is not achieving its affordable housing target or Section 106 Agreements are unrealistic, they may wish to undertake a review to ensure they are achieving the type of accommodation which is needed rather than a target number of units.

1.69 To improve understanding of how affordable housing is delivered, it was suggested that a workshop be organised, led by RPs, who could present to planners and support-service commissioners how they operate and the challenges they face in delivering new affordable homes.

1.70 There should be improved inter-departmental working within councils where affordable housing delivery, land supply, accommodation supply and business hubs could be co-ordinated as a joint priority. This could widen to key stakeholders e.g. developers, RPs and business representatives.

1.71 A rethinking of the definition of key-workers could be undertaken, to include support/service staff for named local businesses and institutions and included within the councils' local connection criteria.

1.72 A deeper understanding of the impact of students in the local housing market would be useful; there are considerable numbers of higher education establishments in the boroughs. Current provision is focussed on bespoke student accommodation (with more planned) as well as significant demand in the local PRS market (where students demand acts as a driver for HMO conversion).

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