OPENGOV2026 IDEATHON

"The Student Housing Crisis Impact & Numbers"

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Idea Description

University of the Aegean SUMMER SCHOOLS

UNIVERSITY OF THE AEGEAN | DIGITAL GOVERNANCE RESEARCH CENTRE www.dgrc.gr

European PBSA Quantitative Assessment

The Student Housing Deficit & Rental Pressure

Europe's metropolitan centers face an unprecedented structural mismatch between specialized student accommodations (PBSA) and academic populations. When PBSA supply falls short, students are pushed into the private rental market (PRS), directly displacing local middle-income families.

JLL 2030 INVESTMENT TARGET

€450B - €466B

Required cumulative capital investment by 2030 to supply the critical core deficit of 3 million student beds across Europe.

PROVISION DISPARITY

15% vs 32%

Continental Europe averages an undersized 15% student bed provision rate, compared to 32% in the institutionalized United Kingdom market.

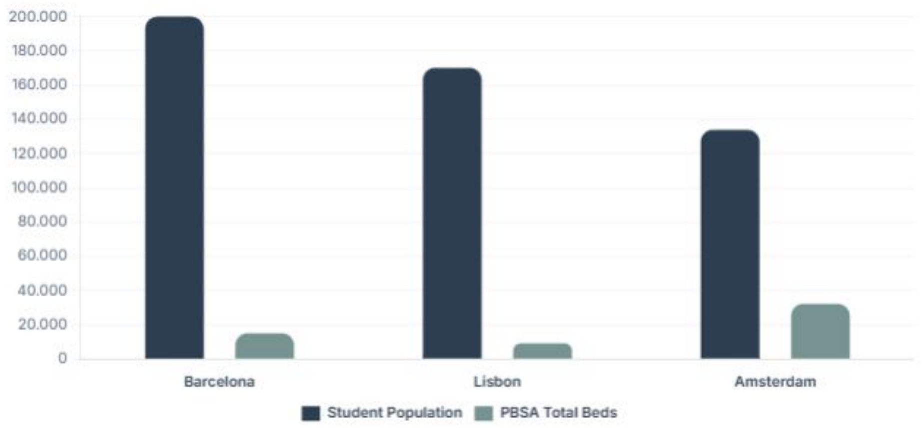
THE STRUCTURAL CONFLICT

PRS Encroachment

Lacking specialized beds, students lease residential flats. Backed by family guarantees and shared budgets, they price out local residents.

The Student Bed Shortfall Profile (2023-2026)

Comparing raw student population against total specialized PBSA stock in the three target cities.



CRITICAL IMPACT

Interconnected Dynamics

Historical rental datasets prove a powerful feedback loop: a 10% swell in a city's general residential lease values automatically drives student housing costs up by 8%.

INTERCONNECTION RATIO

10% : 8%

Barcelona | Lisbon | Amsterdam

Barcelona

JLL Rank: #3 Hotspot

Identified by JLL as Europe's #3 top hotspot for institutional student housing investment alongside London and Paris. However, stringent local rent protection and lack of dedicated land slow down pipeline materialization.

ACADEMIC POPULATION ~200,000	TOTAL BED STOCK ~15,100
GENERAL PROVISION RATE 8.0%	AVERAGE COST / ROOM €600/mo (Avg Room)

Provision Cover vs Active Deficit

Visualizing the ratio of served vs unserved students needing housing.

Barcelona currently has a pipeline of 3,700 upcoming beds representing 36% of Spain's total active developer portfolio.

This project has received funding from the European Union's Horizon 2020 research and innovation programme under the Marie Skłodowska-Curie grant agreement No 955569.

Barcelona | **Lisbon** | Amsterdam

Lisbon

JLL Rank: #8 Hotspot

Lisbon (ranked 8th in JLL priority indexes) presents extreme absolute scarcity. Student rolls surged 83% (100% internationally) in recent years, leaving over 56k displaced students competing for less than 10k professional beds.

ACADEMIC POPULATION	TOTAL BED STOCK
~170,000	**~9,200**
GENERAL PROVISION RATE	AVERAGE COST / ROOM
3.8%	**€450 - €550/mo**

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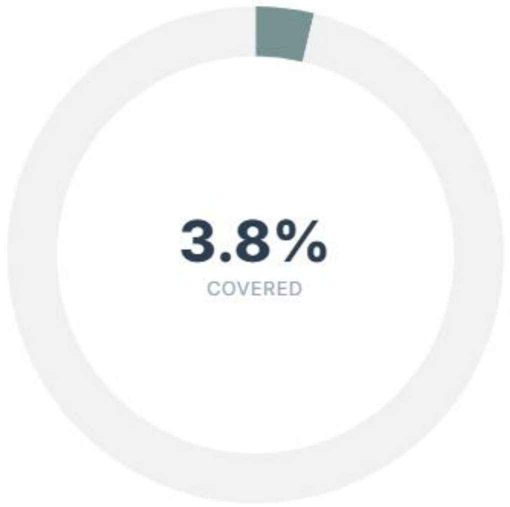

The active private bed stock represents less than 4% coverage of the city's total non-local student demand, the lowest in Europe.

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Barcelona | Lisbon | **Amsterdam**

Amsterdam

JLL Rank: Top Target

Amsterdam represents the peak of rental tension in Northern Europe. New Affordable Rent Act (Wkb) changes drove a massive 25% drop in private room inventory, driving standard student lease premiums up to €974.

ACADEMIC POPULATION **~133,843**	TOTAL BED STOCK **~32,237**
GENERAL PROVISION RATE **24.1%**	AVERAGE COST / ROOM **€974/mo (Avg Room)**

Provision Cover vs Active Deficit

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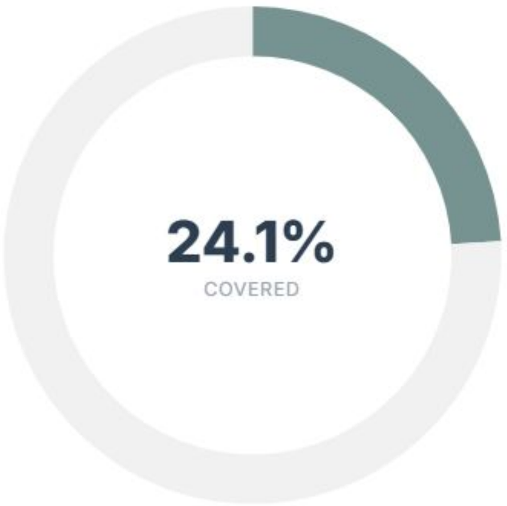

Total provision dropped from 29% in 2021 to 24.1%. Pure institutional-grade provision covers only 9.0% of student demand.

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📈 ECONOMETRIC MODELING

The Local Price Elasticity Model

Empirical macroeconomic modeling across congested European zones establishes an elasticity coefficient of **-2.3**. For every 1% expansion of specialized accommodation stock, overall local residential lease pressures decline by an average of **2.3%**.

- High-congested neighborhood impact (Les Corts BCN / Lisbon center).
- A **2% student displacement** transfers inventory equivalent to **-4.6% rent drop.**

Interactive Impact Simulator

Adjust the values to calculate projections

Simulate Specialized Stock Growth (%)

0.0% **1.0%** 17.0%

ESTIMATED LOCAL RENTAL PRICE SHIFT

-2.3%

`FORMULA: E = %ΔPRICE / %ΔSTOCK = -2.3`

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Interactive Impact Simulator

Adjust the values to calculate projections

Simulate Specialized Stock Growth (%)

0.0% — **5.0%** — 17.0%

ESTIMATED LOCAL RENTAL PRICE SHIFT

-11.5%

FORMULA: E = %ΔPRICE / %ΔSTOCK = -2.3

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Adjust the values to calculate projections

Simulate Specialized Stock Growth (%)

0.0% **17.0%** 17.0%

ESTIMATED LOCAL RENTAL PRICE SHIFT

-39.1%

FORMULA: $E = \%\Delta PRICE / \%\Delta STOCK = -2.3$

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Targeted Policy Frameworks

Every city operates under different legal realities. Here are customized blueprints to unlock specialized student beds.

BARCELONA 3,700 Bed Pipe

Land Zoning & Energy Retrofits

Leverage Spain's recovery plan and regional zoning frameworks to address local regulatory blockages.

- **Terciario Office Conversion:** Quick zoning permits to convert outdated commercial buildings into student blocks.
- **PIREP / PRTR Subsidies:** Utilize EU funds to retrofit old municipal offices under zero-emission standards (nZEB).

Model: Commercial Conversion

LISBON 1.0B National Plan

EIB & State Partnerships

Unleash the Portuguese national housing scheme coupled with long-term international finance structures.

- **PNAES Funding Deployment:** Deploy the €1B NextGenEU allocation to convert historic state structures into public affordable dorms.
- **Non-Compensatory PPPs:** Sign 30-year concession models backed by European Investment Bank soft-lending facilities.

Model: State-Backed PPPs

AMSTERDAM Box 3 Mitigations

Regulatory Exemption & Pods

Counterbalance the contraction caused by the new Affordable Rent Act (Wkb) on individual listings.

- **Institutional Exemption:** Exempt professional PBSA providers from the rent cap rules to secure commercial viability.
- **Temporary Modular Pods:** Replicate fast industrial shipping container structures offering units at €400/mo operating costs.

Model: Modular & Exclusion

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Impact

University of

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The 'Chain Effect' Decongestion Mechanics

How does building custom student spaces relieve the local working-class household? The systemic filtering mechanics explained through economic steps.

01

Residential Stock Liberation

By injecting specialized high-density PBSA units, student cohorts leave shared domestic flats, immediately vacating entire apartment lines for local families.

Freeing domestic housing inventory

02

Hacinamiento Abatement

It ends over-occupancy behavior in residential blocks, minimizing building friction, reducing wear and tear on neighborhood infrastructure, and promoting social harmony.

Restoring neighborhood equilibrium

03

Municipal Fiscal Re-Establishment

Pure student rentals are frequently exempt from local utility taxes or municipal fees. Returning units back to residential families stabilizes municipal tax cash-flows.

Municipal tax base recovery

Information Sources

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Thank you!