PERSPECTIVE

NEWSLETTER OF PERSPECTIVE

A GROUP OF ARCHITECTURAL PRACTICES
WORKING TOGETHER IN EUROPE & ABROAD

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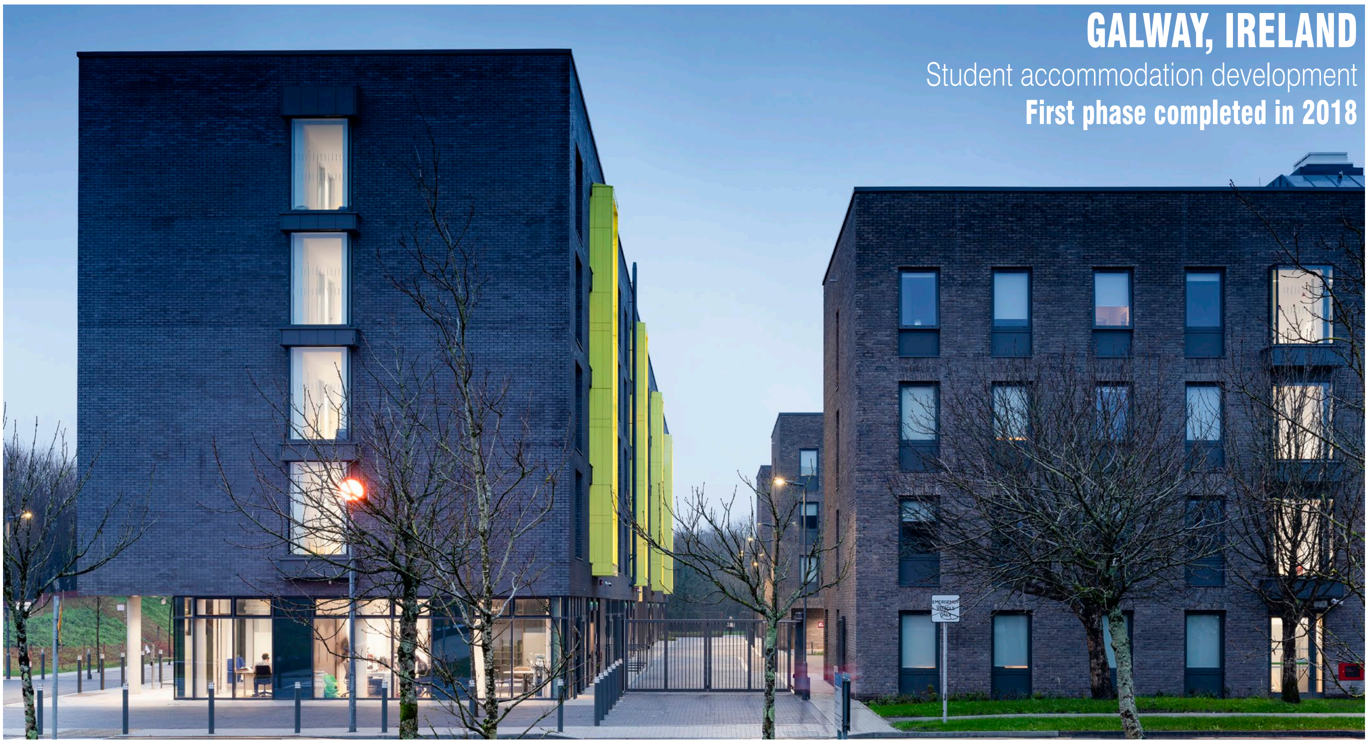
2019
SPRING

MALAGA, SPAIN

Perspective group meeting & opening of the new office in a refurbished historic building

FOCUS TOPIC: STUDENT HOUSING



GALWAY, IRELAND

Student accommodation development

First phase completed in 2018

TONGEREN SCHOOL WINS AN INTERNATIONAL AWARD

- see page 8

PERSPECTIVE MÁLAGA

Opening of the new office & Perspective Meeting

PERSPECTIVE Spain organized the quarterly meeting of the Perspective Architectural Group in Malaga, coinciding with the opening of B/SV new office in that city.

The event started with a cocktail reception in the courtyard of the office building on Calle Larios 4, refurbished by B/SV Arquitectos, which is the first office building in Andalusia to obtain a BREEAM energy certification. During the event Ignacio Sainz de Vicuña, partner of B/SV Arquitectos, said a few words of welcome to the European partners, as well as to the friends, clients and collaborators who were present.

Over the following days, the PERSPECTIVE members visited several of the sites where B/SV are currently carrying out works in Malaga, such as the Larios Centro Shopping Center, and a hotel renovation on Granada Street, as well as the 14th Mediterranean Real Estate Fair (simed).

Several working meetings followed, where PERSPECTIVE members gave an update on projects carried out by the group throughout Europe, and further afield, discussed common strategies and shared views on current trends in architecture and the status of the real estate market in each of our home countries.

Larios Centro | Málaga, Spain

Refurbishment of the shopping center, in association with L35 Arquitectura

PERSPECTIVE Spain is working on the full refurbishment of the shopping center Larios Centro in Málaga, Spain in association with L35 Arquitectura.

Larios Centro is a community of owners, with Merlin Properties being the main one. The center was built in 1996, and the project consists of modernizing the overall appearance, as well as the internal circulation and uses. Our interventions are in three main levels: façades; public spaces and mall; and a new foodcourt in the space occupied by the movie theatre.

The center occupies a whole block, formerly composed by a building of apartments and a hotel above, without any sense of unity. The intervention aims to unify it, and give a recognazible image. We created a new skin, made of white GRC waves that give a new rythm and wrap the building. A new socle, made in grey GRC, with organic white areas, solves the contact with the ground. On the south façade, a new curtain wall is deployed.

In the interior, the project updates the main circulation routes and mall. The vertical circulation is relocated in the north mall, transforming it in the main one. Ceilings, floors and lighting are renovated, gaining clarity and modernity. The restrooms are also transformed with new elements and finishes. We bring the waves and organic forms from the outside into some celings and walls. Finally, the space left by the movie theatres is occupied by a new foodcourt. The actual structure is demolished, and a new space is created on different levels. The foodcourt is on the first floor, directly communicated with the main south entrance. A double transparent space is designed, to give a new view from the outside to the terraces and restaurants.

Construction works began on site in April 2018, and will be completed before Summer 2019.

A PERSPECTIVE ON STUDENT ACCOMMODATION

The growth of international student enrolment continues to drive the demand for quality purpose-built student accommodation (PBSA).

In most European markets, student numbers have been rising. There has also been a substantial increase in English taught programmes (ETPs) which has made European universities more attractive to international students. However, the provision of PBSA across Europe at the national level remains low. It is highest in the UK where 27% of all students can be accommodated, and lowest in southern Europe.

For example, in Italy, which is Europe's fourth largest student market with circa 1.7m students, the national provision rate is less than 5%. Rome has the lowest provision in the country with a student population of circa 220,500 and only 6,500 PBSA beds (a provision rate of 3%). This is followed by Porto, where only 3.5% of the total student population has dedicated bed spaces. Spanish cities are also characterised by low levels of supply. Barcelona is just under 5%, while Madrid stands at 5.7%.[1]

France, Germany, Ireland, Italy, The Netherlands, Spain and Portugal are key markets pinpointed for sustained growth over the next 10 years. New providers and international players are bringing superior product, international expertise and operator economies of scale to these mainland European markets.

Above: **Goldcrest Village Student Accommodation Phase 1**
Galway, Ireland
continued on page 4

Below: **Porto Innovation District**
Architectural contest submission
Oporto, Portugal
RoundHill Capital
943 accommodation modules

[1] Source: Savills World Research using StudentMarketing

PERSPECTIVE Ireland has extensive expertise and experience in student housing and is currently involved in the delivery of over 2,000 student beds across a number of ongoing projects for both universities and private developers in Dublin and Galway.

The Irish Government's National Student Accommodation Strategy, launched in 2017, responded to and recognised the need to address the national and international demand for student housing.

Demand for PBSA in Ireland is forecasted to rise from 57,075 beds in 2017 to 75,640 beds in 2024. The Higher Education Authority reports that Higher Education Institutions and private developers are estimated to make a total gross investment of approximately 1 billion EUR in PBSA over the period from 2017-2024.

I. - II. **Goldcrest Village Student Accommodation Development Phase 1 completed in 2018 | Galway, Ireland**
National University of Ireland
429 beds
in collaboration with: FeildenCleggBradleyStudios

III. **Fairgreen Student Accommodation Galway, Ireland**
165 beds
constructed over an existing bus station

I. - II. **Westwood Student Accomodation | Galway, Ireland**
Global Student Accommodation Provider
394 beds

III. - V. **Student Accommodation Development, phase 2 | Galway, Ireland**
National University of Ireland
680 beds

in collaboration with: FeildenCleggBradleyStudios

I.

II.

INTERNATIONAL TENDENCIES

There has been a substantial increase in English taught programmes (ETPs) which has made European universities more attractive to international students. ETPs in the Netherlands have increased by around 1700 since 2007 while in France over the same time period, ETPs have grown from 11 to 1200 (JLL 2017).

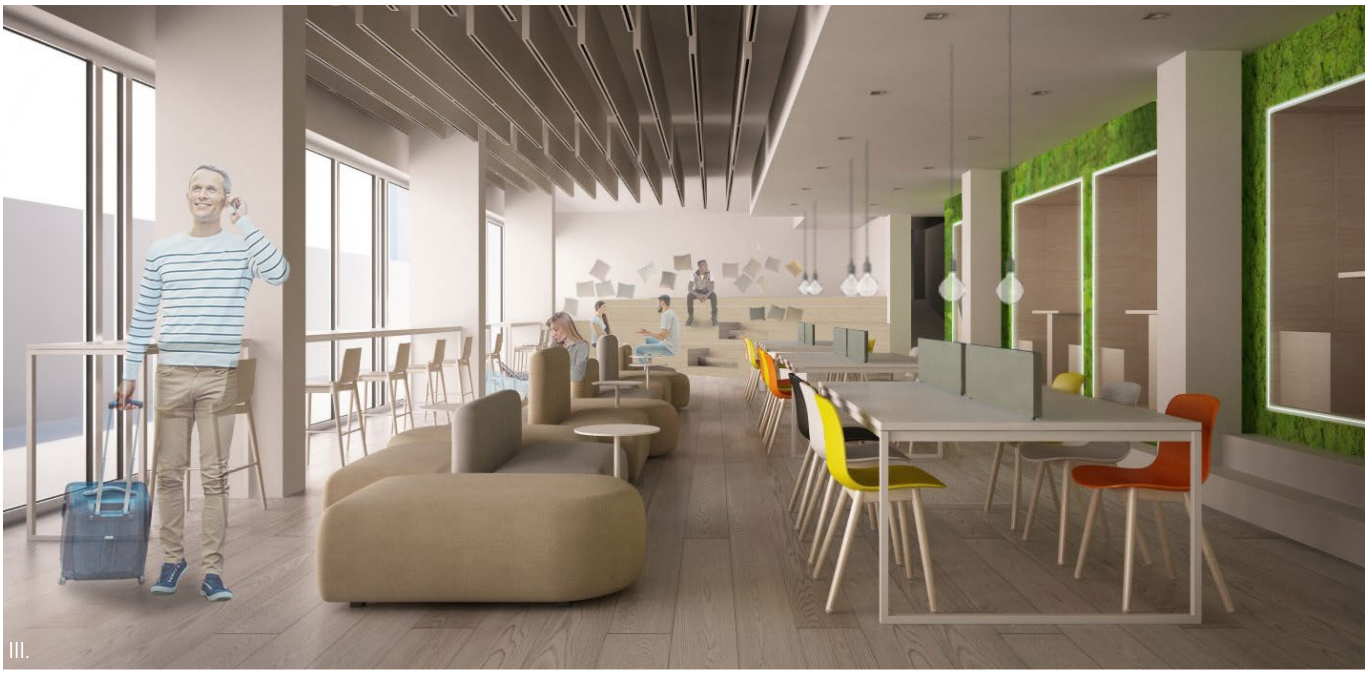
Spain has a fast growing, undersupplied student sector with increasing foreign demand and they are pursuing a policy of attracting more international students and set a target of 1 in 3 university courses to be offered in English by 2020. With an undersupply of student accommodation demand is expected to increase for high-quality private accommodation, driven by these growing numbers.

Brazil is a major growth market, with a rapidly expanding, increasingly outward-looking middle class. To date, the majority of students originating from Brazil have gone to study in the US, followed by France and Portugal. This market, along with other growing South American nations, is poised to make a much bigger impact on the European markets in the coming decades. This will particularly affect cities in Spain and Portugal such as Madrid, Barcelona, Lisbon and Porto.

ITALY

I - II. **Osteo Bello Student House** | Milan
50 rooms | 203 beds

III. **Teatro dell'Ospitalità** | Milan
Student & Business accommodation
118 rooms | 163 beds
In partnership with Milan Politecnico



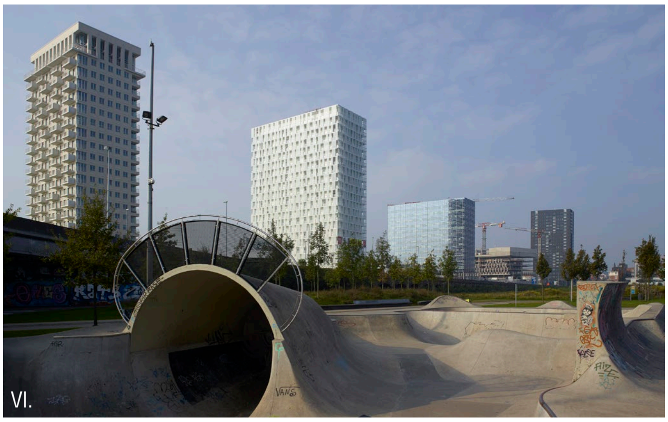
III.

SWEDEN
Flemingsberg
Student House

I - III. **Flemingsberg Student House** | Huddige, Sweden
13 floors | 169 units plus common areas, meeting room, laundromat and commercial areas

Awarded with **Huddinge Municipality beauty prize for buildings**

BELGIUM
ParkToren



IV - VI. **ParkToren** | Antwerp, Belgium
22 floors | 40 student rooms with common kitchens | 200 student apartments | 360 apartments overall

Awarded with **ARCHITIZER A+ 2015**

BELGIUM
VIIO Tongeren Post-Primary School
Tongeren, Belgium

2018 Building of the Year

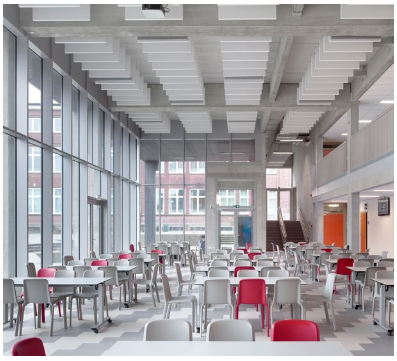
Building and Architect of the Year Awards
Ireland
Category: International
Winner: VIIO Tongeren PP School

The partnership of **PERSPECTIVE Ireland** & **PERSPECTIVE Belgium** successfully delivered 4 schools projects in Belgium with cumulative floor area of 24,000sq.m, as part of the Scholen van Morgen ('Schools of Tomorrow') programme which is a public-private partnership between the Flemish government and AG Real Estate and BNP Paribas Fortis, in the form of a structure called DBFM Scholen van Morgen sa/nv. The programme covers the design, construction, financing and 30-year maintenance of 182 school building projects across Belgium.

TONGEREN is a large school campus comprising a 3 storey classroom building, a technology centre and sports hall completed in 2017.

The existing school comprised a collection of nineteenth and twentieth Century buildings set on a tight urban site forming a series of courtyards. The brief was to provide a total of 6,420sqm of new accommodation consisting of a teaching block of 2,080sqm on the east side of the main 'front' yard forming the third side to a courtyard which remains open to Truidersteenweg to the south. A second building of 3,240sqm was required on open ground to the rear of the school to accommodate technical engineering workshops and classrooms along with a 1,100sqm Sports Hall.

The town of Tongeren is built on the site of a large Roman town of which there are extensive remains visible above ground and significant archaeology below ground which had an impact on the design. The school site is directly inside the line of the Roman town wall.



BELGIUM
ELD NV
Ilka Broeckaert
antwerp@perspective-architecturalgroup.com
T (32) 3 242 94 00

FINLAND
VIRKKUNEN & CO ARCHITECTS
Risto Virkkunen
helsinki@perspective-architecturalgroup.com
T (358) 9 5860 770

FRANCE
LPA ARCHITECTES
Charles Bourguignon
paris@perspective-architecturalgroup.com
T (33) 1 45 00 63 81

IRELAND
COADY ARCHITECTS
Mark McCann
dublin@perspective-architecturalgroup.com
T (353) 1 497 6766

ITALY
D2U DESIGN TO USERS
Jacopo della Fontana
milano@perspective-architecturalgroup.com
T (39) 02 4398 1021

POLAND
ELD POLAND
Waldemar Wiśniewski
poznan@perspective-architecturalgroup.com
T (48) 61 852 46 33

PORTUGAL
NLA NUNO LEÓNIDAS ARQUITECTOS LDA
Nuno Leónidas
lisbon@perspective-architecturalgroup.com
T (351) 21 454 44 30

SPAIN
B/SV BERNAR SAINZ DE VICUNA ARQUITECTOS S.L.
Manuel Bernar
madrid@perspective-architecturalgroup.com
T (34) 91 435 34 33

SWEDEN
AHLQVIST & ALMQVIST ARKITEKTER AB
Britt Almqvist
stockholm@perspective-architecturalgroup.com
T (46) 8 55 696 880

STRATEGIC ALLIANCES
CAPE VERDE
CROATIA
CZECH REPUBLIC
EAST TIMOR
HONG KONG
MEXICO
OMAN
PHILIPPINES
SAN FRANCISCO
SINGAPORE
SWITZERLAND

PERSPECTIVE

ADMINISTRATOR@PERSPECTIVE-EEIG.COM