

ANUK/Unipol National Codes for Purpose Built Student Accommodation

Annual report for the Ministry of Housing, Communities and Local Government

Covering the period 1st August 2023 to 31st July 2024

History of the National Codes

The National Codes were developed in response to concerns raised by a number of organisations, including the National Union of Students (NUS), about management standards in the expanding new sector of privately-owned and -managed student accommodation.

Following initial discussions in 2002, the Accreditation Network UK, NUS and Unipol Student Homes formed a consortium in 2004 and began to devise a Code for private sector accommodation providers. Discussions were held with a number of private providers, some of whom agreed to become founding members of the Code. Meetings were also held with other interested stakeholders, such as the Association of Residential Student Accommodation and College and University Business Officers, who suggested developing a Code for accommodation managed by universities and colleges as well.

The Codes were formally launched in November 2004 and the first membership year began in 2005 – with around 50,000 bed spaces covered.

During the passage of what became the 2004 Housing Act, the Government expressed some interest in recognising Codes of Practice/Standards within the scope of this legislation. It therefore awarded 'Approved' status to both of the ANUK/Unipol Codes in 2006 (and did the same for the Code operated by Universities UK).

By 2007 it had become clear that the ANUK/Unipol Code for Educational Establishments was in need of some revision in order to better reflect the standards that managers of University and College accommodation were aspiring to. A review was carried out and a revised Code received government approval in August 2008.

Both of these Codes have 'Approved' status under Section 233 of the 2004 Housing Act, which requires local housing authorities to except accommodation operated by educational establishments from mandatory HMO Licensing. However, accommodation operated by non-educational establishments is not excepted.

The above legislation only applies to England, and different requirements exist in Wales and Scotland. However, where a provider has signed-up to the National Codes, their requirements apply to purpose-built student accommodation throughout the whole of the UK.

Following review of the ANUK/Unipol Code for Non-Educational Establishments, a revised version came into effect from March 2022. A review of the Code for Educational Establishments was completed in April/May 2024 and submitted to MHCLG, and the Statutory Instrument for it was laid on September 12th.

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Executive Summary

The National Codes continue to be a highly effective tool in raising property and property management standards in purpose-built student accommodation (PBSA), operated by both the educational and private sectors.

2023/24: The year in review

Review of the Code for Educational Establishments

The final version of this Code received Parliamentary approval on September 12th 2024 and will come into force from October 15th. However, the existing Code for Educational Establishments will continue to be approved until January 15th 2025.

Verification Visits

In 2023/24, 189 verification visits were completed, 184 of which resulted in actions and improvements. This is an increase of just 5 additional visits on 2022/23. The proportion of visits which resulted in actions, however, rose from 92% in 2022/23 to 97% in 2023/24. This is the highest level on record in the Codes' seven-year dataset.

Verification and Assessment System Update

Following recommendations made by the Audit Panel, some refinements to the verification visit process have been recommended. These changes will alter the way in which external verifiers approach visits, with an emphasis on greater consistence in how they are conducted, and how outcomes are reported.

Training

1,388 members enrolled on National Code training, and 629 delegates attended training events, including Mental Health First Aid training, Tenancy Support and Student Wellbeing online forum and Being Queer in Halls – Understanding LGBTQ+ issues in Student Accommodation. A specialist Diversity, Equity, Inclusion and Belonging Training (DEIB) course has also been run, alongside several other initiatives to support diversity and inclusion in the sector.

The inaugural National Codes Student Experience Conference was held at the Lowry, Manchester on 21st March 2024. The event sold out, attracting 117 attendees in total.

Complaints

The number of complaints to the National Codes is at its highest level in 2023/24 at 364 cases, up from 339 in the previous year. There were no cases resolved by tribunal during the period. The top subjects of complaint and enquiry are repairs/the condition of the building. These are by far the ~~highest-number-most common of~~ complaints, particularly when combined with separate complaints about lifts being out of order. Tenants seeking release/refund continue to rise and ~~at-are atis~~ their highest level, coinciding with affordability concerns nationwide.

Advocacy and Research

A large number of research pieces were published in 2023/24 including the International Student Housing Survey, Leeds Student Housing Research, and the Ten Cities Rent Survey.

Looking Ahead

2024 and beyond will be a period of intense challenge to the PBSA sector, and as a result several initiatives are underway:

- **Renters' Rights Bill** - The National Codes have written to the Government regarding the new Bill in order to outline the main impacts for student housing and will continue to advocate for the sector.
- **National Codes Five-year Strategy** now is a prudent point to undertake a strategic review of the National Codes to build firm foundations for their continued future sustainability over the period 2025 – 2030. The objective of the review will be to confirm a clear mission, direction and set of strategic priorities for the National Codes in the face of multiple new challenges arising from market and legislative change.

Membership of the Codes

There are 418,609 bed spaces covered by the Codes and membership has risen in 2024 by 11,913 bed spaces or 2.9% on the previous year. Prior to 2022, membership had been rising steadily, however in the past two years, economic turbulence and changes to planning systems has resulted in a slowdown in the delivery of beds. In 2023 there were only 61 new bed spaces delivered – virtually no change on the previous year. This is the first time in the history of the record that this has occurred.

Governance

The Codes' standing bodies – the Committee of Management, the Audit Panel and Consortium – are running effectively and meeting regularly to discharge their responsibilities fully. Attendance of the Committee of Management has improved significantly since 2019-2020, and in 2023/24 attendance was the highest on record at 95 attendees, and an average attendance per meeting of 32.

The standards team at Unipol, who run the Codes, are very proud of the work that has been done in the sector over the past year, and we look forward to continuing to extend our beneficial influence over the student accommodation sector in the forthcoming year.

A year in review: key statistics 2023/24

418,609 bed spaces covered by the National Code

11,913 additional beds on the previous year, up 2.9%

58 per cent of the sector's bed spaces are covered by The Codes

5 new member organisations

629 members enrolled on National Codes training courses

26,347 visitors to the National Codes website

189 verification visits completed, 184 of which resulting in actions and improvements

364 complaints to the National Codes, 99 of them investigated by the Code Investigator

97 per cent of complaints resolved for the year, up from 92 per cent last year

Introduction

The [National Codes](#) continue to be a highly effective tool in raising property and property management standards in purpose-built student accommodation (PBSA), operated by both the educational and private sectors.

Central to the success of the enterprise is the level of trust and confidence that ANUK/Unipol are able to build and sustain in both sectors. Critical to these are:

- the integrity and robustness of the formal documentation that underpins the Codes;
- the effective, consistent and fair use of that documentation through trusted, competent professionals operating in sound administrative and governance structures;
- the high profile of its website as not only a reference facility for stakeholders but as an authoritative source of up-to-date information, guidance and advice on good practice for the whole sector.

2023/24: The year in review

Policy, sector and student support

As in previous years, the National Codes have sought to influence the activities of accommodation providers through the standards set down in the Codes, as well as UK Governments through responding to relevant consultations and via written briefings.

Review of the Code for Educational Establishments

The final version of this Code received Parliamentary approval on September 12th 2024 and will come into force from October 15th. However, the existing Code for Educational Establishments will continue to be approved until January 15th 2025.

Diversity and Inclusion

There are a number of significant updates in this area:

- **Diversity, Equity, Inclusion and Belonging Training (DEIB):** Sam Kingsley, an experienced DEIB consultant with a deep understanding of the HE sector, delivered the first of two one-day courses in December, 'Room to Belong: Diversity, Equity, Inclusion and Belonging in Student Accommodation'. A DEIB module will be introduced to the compulsory online training for all National Code members.
- **Living Black Commission:** Support has been given to the Living Black Commission through Vic Peckitt, National Codes Complaints Investigator) representing The Codes. The Commission was convened to put into practice the ten recommendations arising from the 'Living Black at University' report (Unite Students, 2022).
- **Complaints Training** is being developed with of objective of cultivating an inclusive complaints culture, and exploring how PBSA providers can accommodate diverse needs, and support a sense of 'belonging' for all. Refinements have been made to the complaints-handling procedures, specifically where there are allegations of discrimination or harassment, or in cases involving protected characteristics or reasonable adjustments. The complainant is invited to meet and discuss their case, so that a first-hand discussion can take place, resulting important insight into the student's experience and informing further learning and development for the team.

- **Bullying and Harassment Policy:** Last year Unipol Housing introduced a new 'Bullying and Harassment policy', and next year Unipol will be revising the DEIB policy for staff and tenant. This will be shared with National Code Members as an example of good practice.

RAAC Checks

Although the Committee of Management meeting in March 2024 agreed that no further survey work was required of members on this issue, it did instruct the Code administrators to follow-up on the small number who reported that they were checking to ensure that none of the buildings were impacted by this. This work has concluded, as the follow-up investigations identified no buildings operated by Code members with RAAC.

Licensing Fees

The findings from the survey of licensing fees, launched in March, were reported to the July meeting of the National Codes Committee of Management. The outcomes from the survey of members with respect to these has now been added to the National Codes website (see link), but members have been asked to supply updates as and when they get discounts/exemptions offered to them by local authorities.

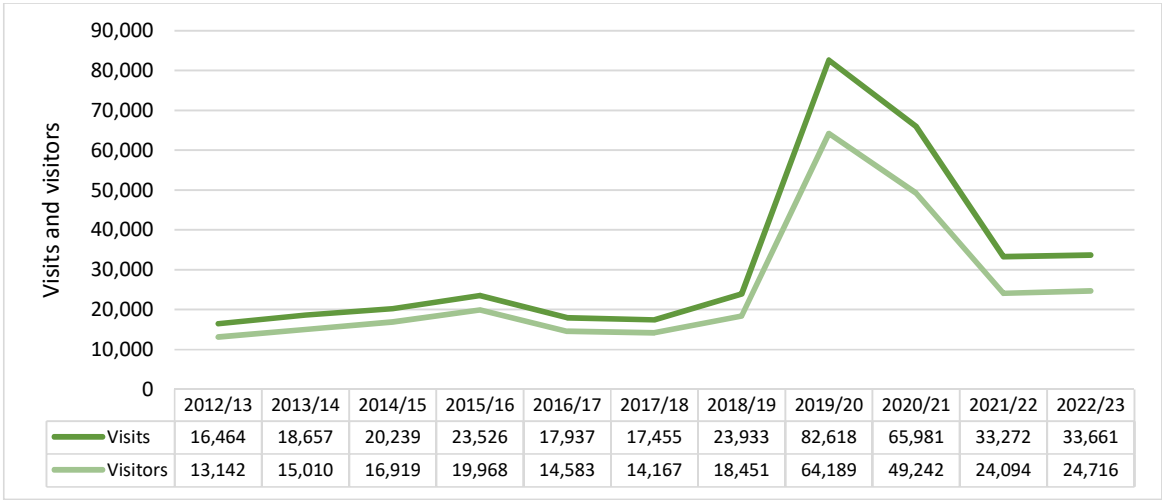
<https://www.nationalcode.org/news/licensing-fees-exemptions-and-discounts>

The Codes remain committed to working with the BPF to lobby for exempting the PBSA sector from licensing altogether. Following some recent newspaper articles on the issue of licensing, the National Codes have issued some updated guidance on what non-educational establishment Code members need to be aware of.

This is available on the news section of the National Codes website

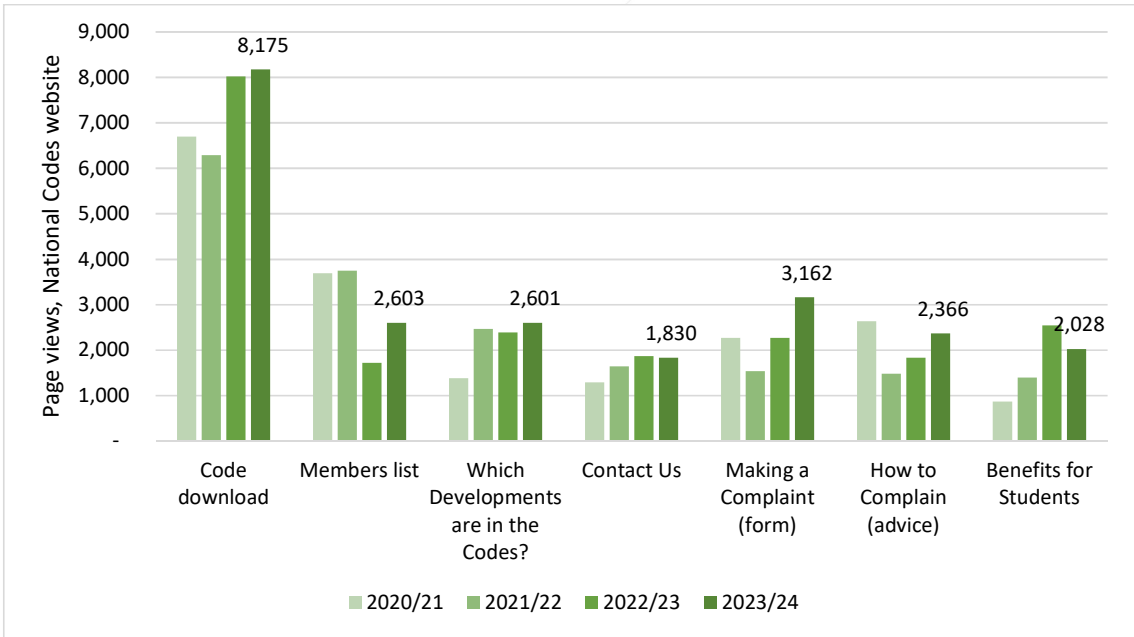
<https://www.nationalcode.org/news/hmo-licensing-getting-it-right-revisited>.

Figure 1: National Codes website: visits and visitors



There were 22,765 page views on the National Codes website in 2023/24, an increase of 10 per cent on the previous year. Use of the website changes each year, but post-Covid there has been an increased engagement via downloading of the Codes and also in the areas relating to complaints.

Figure 2: Page views, National Codes website



Verification visits

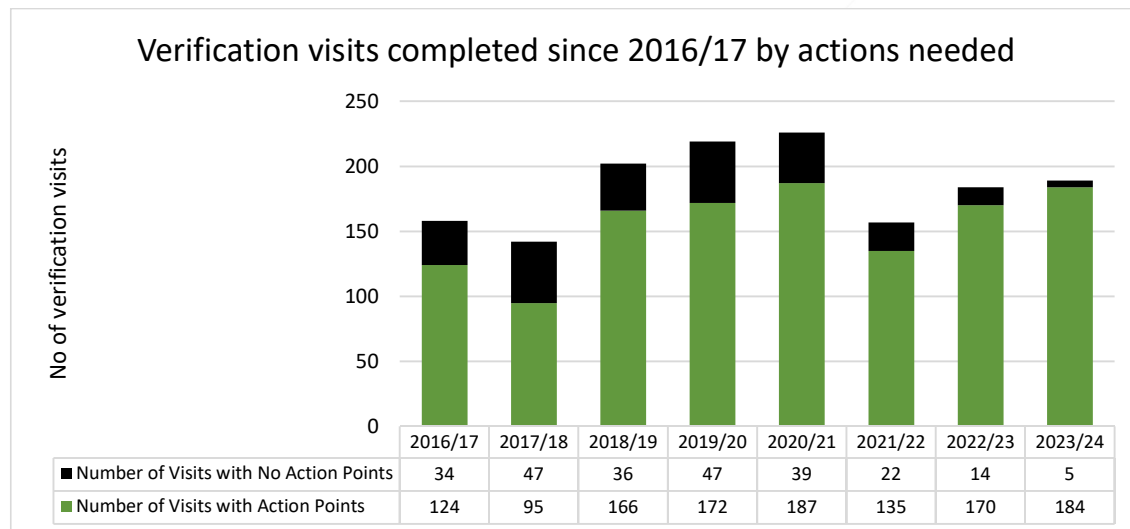
Visits to member properties to ensure compliance with Code standards on safety and operational effectiveness are a core component of scheme administration. There are eight types of visit conducted each year:

New applicants	Cyclical re-visits	New developments	Complaints
Existing members	Revisits	Change of operational management	Chairs' action

In 2023/24, 189 verification visits were completed, 184 of which resulted in actions and improvements. This is an increase of just 5 additional visits on 2022/23.

The proportion of visits which resulted in actions, however, rose from 92% in 2022/23 to 97% in 2023/24. This is the highest level on record in the Codes' seven-year dataset.

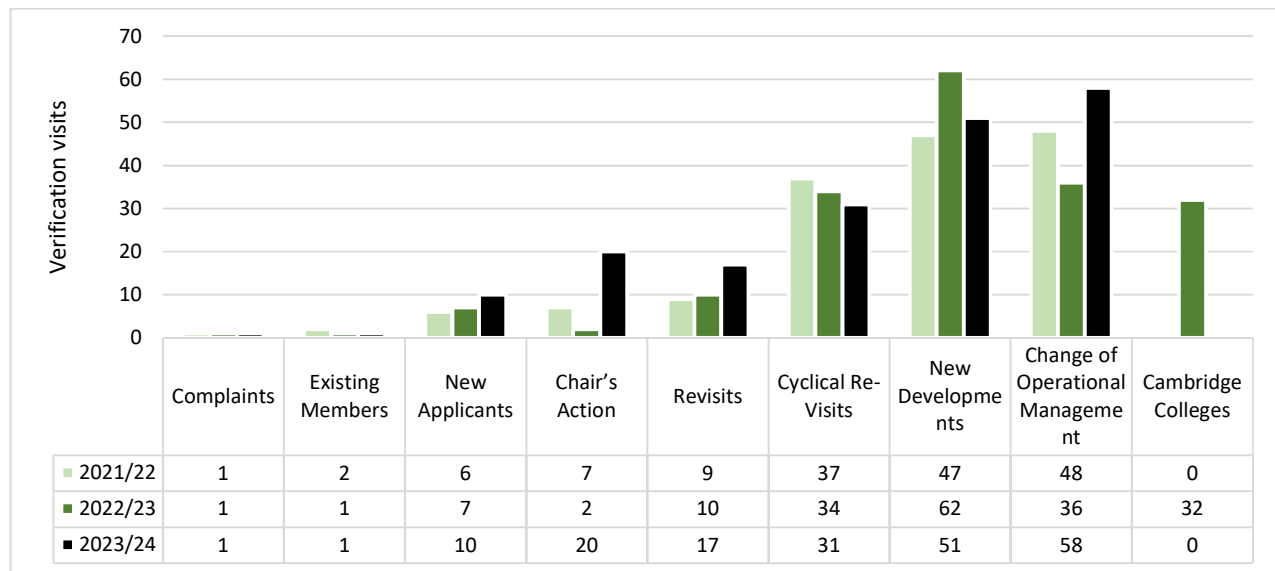
Figure 3: *Verification visits completed since 2016/17 by actions needed*



Since 2021/22, there has been a trend towards increasing the proportion of verification visits that result in actions, and this trend has resulted in only 5 visits reporting no actions.

The chart below highlights the nature of the visits for the past three years, and indicates that most of the verification activity in 2023/24 was due to new developments (continuing the pattern for the previous years) and also due to changes in operational management, which was a more regular occurrence in 2023/24 as compared to the previous year.

Figure 4: Verification visits by type



Each year, in addition to the visits triggered by sector activity, verifiers run a location-specific visit programme. In 2024, Cardiff was chosen for this purpose and 11 visits took place. The location-specific visit allows a team-based approach to verification and individual views can be moderated to ensure consistency in the verification programme.

Verification and Assessment System Update

Following recommendations made by the Audit Panel, some refinements to the verification visit process have been recommended. These changes will alter the way in which external verifiers approach visits, with an emphasis on greater consistence in how they are conducted, and how outcomes are reported.

The points of consistency to be introduced include:

- Circulation of standardised documents in advance of the visit;
- Standardising the format of the visit;
- Inclusion of the student voice;
- Review process at the end of the visit;
- Standardised training materials for verifiers.

These alterations to the system follow-on from the changes that were introduced in early 2023 with the introduction of the second self-assessment questionnaire that is specific to the development which is to be visited (known as the SSAQ). These are designed to be completed by the local management team and focus more directly on operations within the building itself – as opposed to back-office policies and procedures which the Operational Self-Assessment Questionnaire (OSAQ) concentrates on. A key feature of the SSAQ is that it enables the local managers to upload the most recent Fire Risk Assessment for the building, which is an annual requirement with respect to buildings of 18 meters or more in height.

Flagship National Codes Student Experience Conference

The inaugural National Codes Student Experience Conference was held at the Lowry, Manchester on 21st March 2024. The event sold out, attracting 117 attendees in total which included 80 paying delegates from 37 different organisations, plus 27 speakers, staff and exhibitors.

Training

A range of training is provided for members of the National Codes to support good practice and compliance.

Figure 5: National Code training course: members enrolled

	2020/21	2021/22	2022/23	2023/24
Members enrolled	1,251	1,617	1,502	1,388

In 2023/24, 26 Unipol training events were held, attracting 629 delegates, of which 19 were delivered online and attracted 309 (49%) delegates.

Figure 6: National Code training events

Month	Title
September	Mental Health First Aid (Online)
October	Tenancy Support and Student Wellbeing online forum (Bullying and Harassment)
	Ask Hilary (October) - Anti social behaviour
	Mental Health First Aid (Online)
	10 City Rent Survey Launch
November	Joint Codes Conference 2023 - Engaging with and Delivering for Students
December	Being Queer in Halls – Understanding LGBTQ+ issues in Student Accommodation
January	This is not what I signed up for: The anatomy of student complaints
	Ask Hilary (January) - Bullying and Harassment
	Mental Health First Aid (Online)
	Tenancy Support and Student Wellbeing online forum (Drugs)
February	Understanding the HHSRS
	Getting up to speed with the Building Safety Act
March	This is not what I signed up for: The anatomy of student complaints
	National PBSA Sector Briefing
	The National Code's Student Experience Conference 2024
April	Managing Early Termination of Tenancy: Tenancy Release and the Grounds for Eviction in Student Property
	Being Queer in Halls – Understanding LGBTQ+ issues in Student Accommodation
	The Law and Student Housing
	Tenancy Support and Student Wellbeing online forum (TBC)
May	Mental Health First Aid (Online)
	This is not what I signed up for: The anatomy of student complaints
June	Dealing with Angry Tenants: Conflict Management in Student Accommodation
July	Mental Health First Aid (Online)

Month	Title
August	Analysing HE Student Number Data: Insights for the 2024/2025 Academic Year

Advocacy and research

Unipol created several significant pieces of research work in 2023/24

- **[International Student Housing Survey, Unipol, June 2024](#)**

In 2023, Unipol conducted a study investigating the key issues experienced by international students in finding accommodation and in living in the UK. The study is based on results from 3,698 international students across 30 universities. The results were analysed in detail in November 2023. However, following changes to postgraduate taught visa regulations for students with dependents in January 2024, the dataset was reinvestigated to consider implications for students not affected by the new rules.

The research highlights that where students are living with the university or in private PBSA, overall experiences for international students are not positive, achieving an NPS score of -25.

The research made several policy recommendations:

- Provision of information improvements
- Managing Expectations
- Specialist Support for selected student groups including postgraduates and those arriving in January, whose housing options are particularly limited.

We encourage colleagues to read the briefing paper linked to this report for further details.

- **[Leeds Student Housing Research, February 2024](#)**

Unipol has produced an assessment of the Leeds student housing market.

The report was commissioned and funded by the Leeds Beckett University, the University of Leeds and Leeds City Council, and considers:

- The size, distribution and location of student residence in the city over time
- Current and future housing needs of students
- How student residential requirements interact with other tenures and renters in the city, particularly other young renters.

- **[The Ten Cities Rent Survey Unipol/Higher Education Policy Institute \(HEPI\), December 2023](#)**

This work is the latest in the Accommodation Costs Survey series of research reports conducted with rental data and views supplied directly by universities and private providers of accommodation.

The key findings of the report included that rents for student accommodation have increased by an average of 14.6% over the past two academic years, according to a new report from Unipol and HEPI, meaning they now swallow up nearly all of the average maintenance loan.

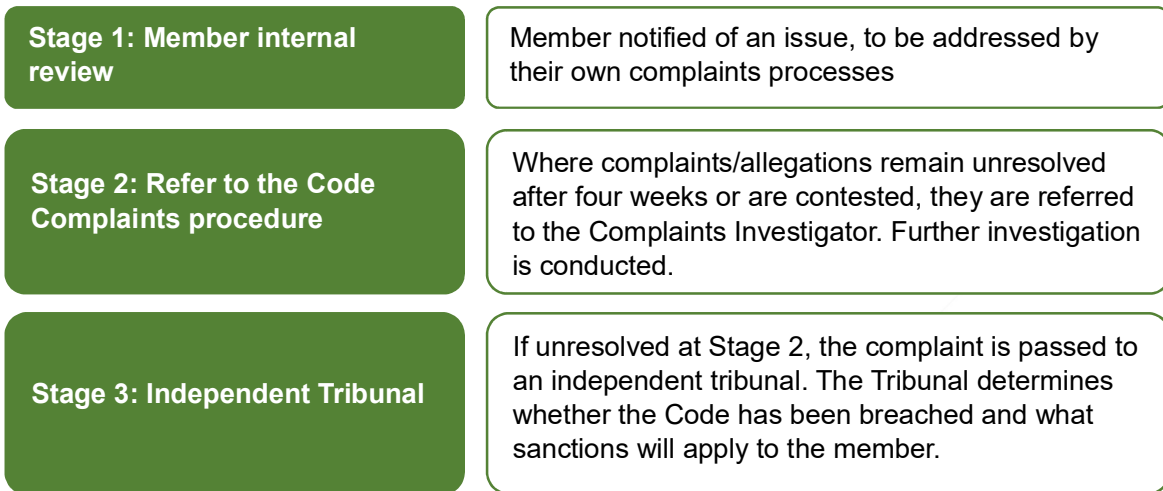
The report sets out a number of policy recommendations for the Government, universities and providers to consider:

- Major reform of the student maintenance system
- Financial support and introduction of affordable room options
- Facilitating more supply through active engagement with planning systems

Code complaints, investigations and tribunals

The Codes complaints procedure follows a three-stage process. This provides for cases to be escalated as necessary:

Complaints process: three-stage process

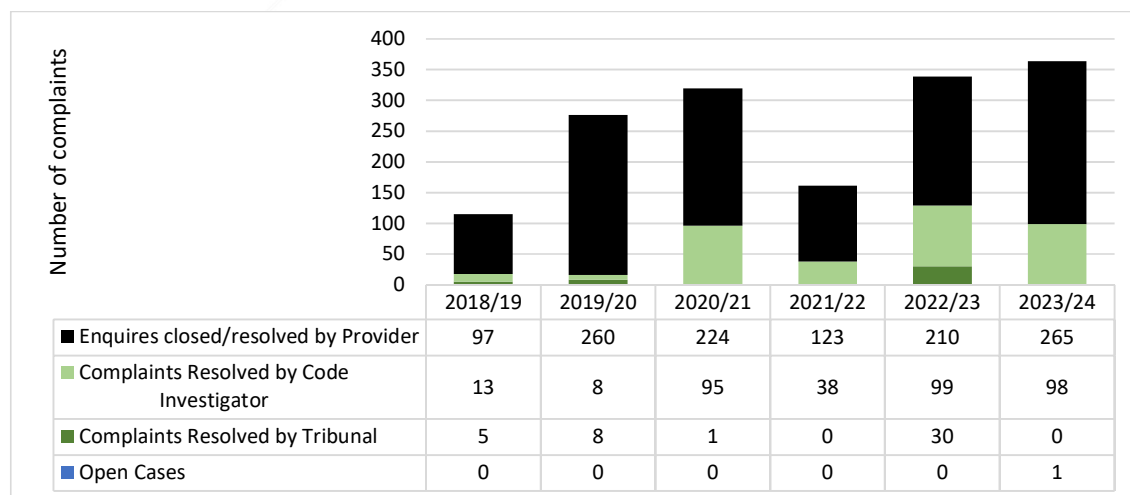


Complaints activity 2023/24

The number of complaints to the National Codes is at its highest level in 2023/24 at 364 cases, up from 339 in the previous year.

The Code Investigator resolved 98 cases, a similar number to the previous year, but significantly more than in 2021/22. Complaints escalated beyond the provider were at 27% in 2023/24, continuing a trend for just under 30% of cases to be resolved at this level since 2020/21. In 2022/23 thirty cases in total were referred to tribunal (this was multiple complaints about two main issues, one late building and one building that was served with a prohibition order, each which received 15 complaints). There were no cases resolved by tribunal during the period.

Figure 7: Complaints and investigations

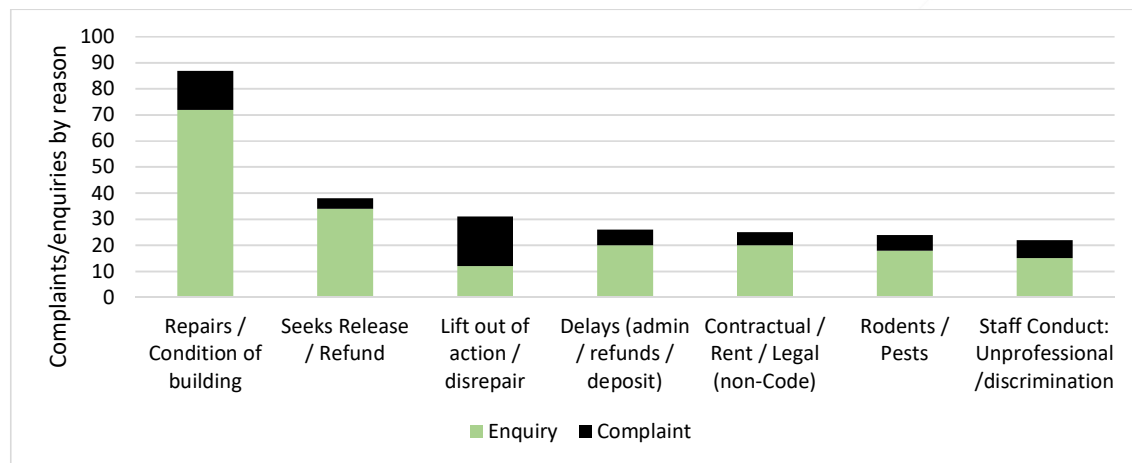


There are some possible reasons for the increase in complaints, which include:

- **greater awareness of complaints procedures** at a number of levels. The National Codes Complaints Process has been widely advertised by Students' Unions, and in addition, it has become a requirement of The Codes that members provide details of their complains processes on their websites, which includes a link to the National Code Complaints Processes. As the National Code is a trusted source of independent and impartial advice, the referral process is welcomed by the sector.
- **affordability concerns rising** as rents rise, tenants are becoming increasingly aware of value for money and potentially levels of dissatisfaction; or potentially utilising this route to exit contracts where affordability has become untenable.

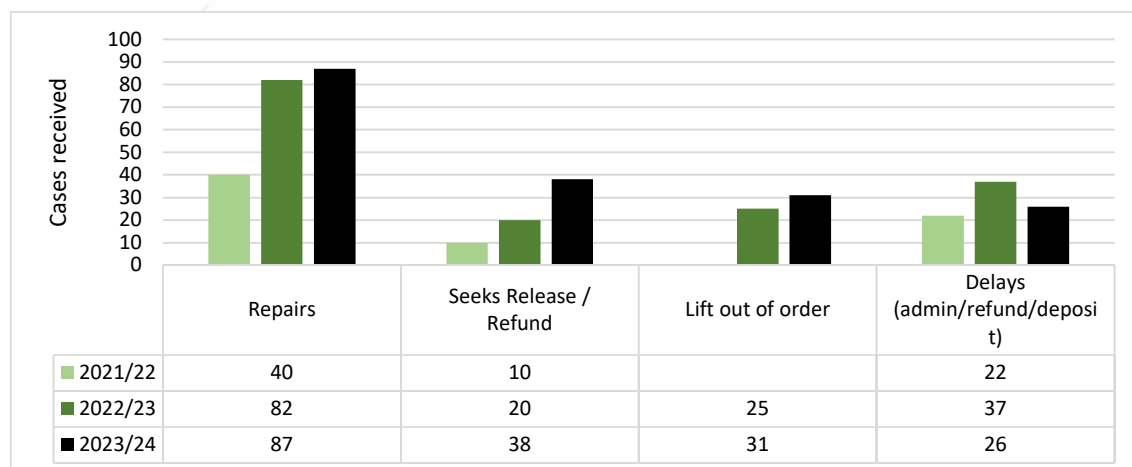
The top subjects of complaint and enquiry are shown in the chart below, where repairs/the condition of the building are by far the highest number of complaints, particularly when combined with lifts being out of order.

Figure 8: Top reasons for complaints/enquiries 2023/24



The top three categories of complaints have been rising in number over time. Complaints about repairs have more than doubled in three years. The number of complaints received in relation to release from contract or refund of rent was 38 in 2023/24 which is a rise from the previous two years – in 2022/23 there were 20 such complaints and in 2021/22 there were just 5.

Figure 9: Change in number of cases received by category over time



The Complaints Tribunal: decisions and audit outcomes

The National Codes website contains details of the cases which have been upheld through the Tribunal and Audit Panel processes. Details of all upheld decisions are posted on the [Tribunal and audit outcome web pages](#), and remain there for three years. The Tribunal upheld no complaints in the 2023/4 academic year.

Looking forward: opportunities and challenges in 2024/25 and beyond

Renters' Rights Bill

Following the 2024 General Election, the incoming Government announced that it intended to press ahead with introducing legislation encompassing tenure reforms within the private rented sector, and renamed the previous Government's version of this (Renters Reform Bill) to Renters' Rights.

In the original version of the legislation PBSA providers were to be regarded as being outside of the tenure reforms, and when the revised legislation was published in September 2024 this same commitment was included. However, whilst the intentions of the revised Bill are that PBSA providers who are members of a Government approved Code of Practice will be deemed as being outside of the scope of the tenure reforms, the proposals made clear that the new Government expected residents living in such buildings would be able to enjoy similar rights as those conferred on others living in the PRS.

In response to this the National Codes have embarked on a rapid review of the content of its Code for non-educational establishments, focusing on the rights of residents as well as updating the health and safety requirements so that they align with recent legislative and regulatory changes with respect to fire and building safety. In addition, the Codes' governance arrangements are under review, with particular emphasis being placed on ensuring that they are robust enough to cope with the transition from a purely voluntary process to a more regulatory role.

National Codes Five-year Strategy

Following a period of relative political and legislative stability, the post-Covid landscape has forced the sector to adapt to multiple new challenges. Alongside the new Government, there remain a set of key issues affecting the future health of the student accommodation sector. Key challenges include:

- A more costly and heavily regulated development/ construction process. The Building Safety Act in particular is impacting the speed at which new student accommodation schemes will be delivered and subjecting developers and operators to additional risk.
- International student recruitment is more uncertain; however, the Labour administration has signalled its intent to launch an International Student Strategy to regain some of the goodwill lost in recent years through visa policy change.
- Rising rents and concerns over widening participation for UK domiciled students, in line with rising tuition fees and changes to the payment profile of Student Loans.

These changes mean that The Codes are operating within a much faster-changing market. It is therefore considered that now is a prudent point to undertake a strategic review of the National Codes to build firm foundations for their continued future sustainability over the period 2025 – 2030. The objective of the review will be to confirm a clear mission, direction and set of strategic priorities for the National Codes.

The decision that was taken at the July 2024 Committee of Management meeting to develop a five-year strategy for the Codes, Richard Kington – the newly appointed Chair of the Committee of Management – has agreed to take on the role of co-ordinating this work, which it is hoped will be concluded by mid-2025.

The London Rent Survey 2024

Following the success of the HEPI/Unipol 10 report Student accommodation costs across 10 cities in the UK, Unipol has conducted an additional piece of research for 2024, focusing on the London student accommodation market to track costs and rent setting since the last full edition of the Accommodation Costs Survey (ACS) in 2021. Coverage of the London market was at 80%, or 76,000 rooms.

The report found that the gap between the average rent in London and the average maintenance loan paid to English students from non-London domiciles studying in London was £2,890, double the gap just two years prior.

The report makes several key recommendations to help address the growing affordability issue and ensure the future sustainability of student accommodation in London:

1. **Support the London Plan:** The report urges the Government and universities to uphold and support the principles behind the London Plan, which emphasize affordability and sustainable development. Allowing supply to meet demand will help bring rent levels down and ease the pressure on students.
2. **Prioritise financial support for students:** Universities and private accommodation providers should increase efforts to offer financial incentives, bursaries and support to students, helping to attract and retain talent in London.
3. **Fix the student maintenance system:** A key recommendation is for the Government to overhaul the student maintenance loan system, which currently leaves many students unable to cover their basic living costs. This includes renewing calls for more information, advice, and guidance for students navigating the accommodation market.

Accommodation Costs Survey 2025

The ACS is a longitudinal dataset that analyses trends in the provision of student accommodation and its cost, and captures the strategic direction and key issues facing student accommodation providers in the UK. There is a proposal to undertake the full UK-wide survey in 2025, one year later than it would normally have taken place due to the London Rent Survey. It is likely that Unipol will continue to partner with the Higher Education Policy Institute once again for this project.

Accredited Training

As the PBSA sector has expanded over the last three decades, there is growing recognition of the impact of highly skilled building managers on business performance including income maximisation, retention and customer satisfaction. As the need for skills has formalised, major operators in the PBSA sector have invested heavily in internal skills and development for their own teams, but there is also recognition that externally validated qualifications could play a significant role in retention and improving business performance.

Unipol has had initial conversations with Leeds Beckett University about developing a degree apprenticeship, or similar, in PBSA management. The intention is that the programme would be funded by the apprenticeship levy, and that the course content would be developed in collaboration with Code Members. Further work on this proposal will take place in 2025.

Student Engagement

The Summer of 2024 saw the re-building of a closer working relationship with the National Union of Students' (NUS). The administrators of the Code met with representatives of NUS to discuss strategic priorities, Governance and joint areas of working.

As a result, NUS has fully nominated representatives into their allocated places in the National Codes Governance structure, ensuring student representation at every level. NUS sabbatical officers now serve two-year terms which adds consistency in engagement.

For 2025, NUS and Unipol will work collectively to bring engaged sabbatical officers from Students' Unions across the country together via the Student Advisory Group, the next meeting of which is scheduled to take place in early 2025. The key areas of focus will be the impacts of the Renters' Rights Bill and the review of the Non-educational Code.

Looking further ahead

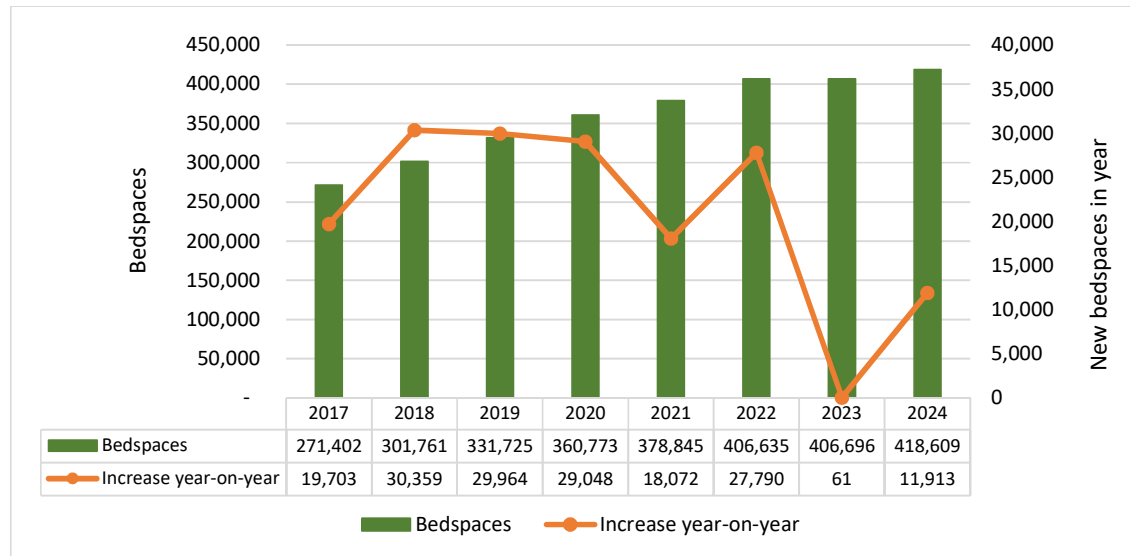
It will take two to three years for the changes in the Renters; Rights Bill to fully bed in for both the PBSA and off-street housing markets, and the National Codes will support members to adapt. It will also monitor the impact on the cost, affordability and availability of student housing and what impact the legislation may have.

In the light of the growing accommodation shortages across the UK, over the next year, it is hoped that a 'traffic light' system can be developed to tell students where there are shortages and how it might affect them across a letting year.

The National Codes: Membership

There are 418,609 bed spaces covered by the Codes and membership has risen in 2024 by 11,913 bed spaces or 2.9% on the previous year. Prior to 2022, membership had been rising steadily, however in the past two years, economic turbulence and changes to planning systems has resulted in a slowdown in the delivery of beds. In 2023 there were only 61 new bed spaces delivered – virtually no change on the previous year. This is the first time in the history of the record that this has occurred.

Figure 10: volume of bed spaces covered by the Codes since 2017



Membership Profile

Of the bed spaces covered by both National Codes, 91 per cent (381,457) fall within the Code for Private Providers. Private sector provision of bed spaces continues to be the driver of bed spaces in the market overall. The figure below illustrates just how vigorous expansion is in the private sector: an increase of 62 per cent (or 145,373 additional bed spaces) since 2017/18.

The number of bed spaces in the Code for Educational Providers has changed very little in the seven-year period of the data (1,834 bed spaces or 5 per cent change).

Figure 11: *Bed spaces by Code (Educational and Non-Educational)*

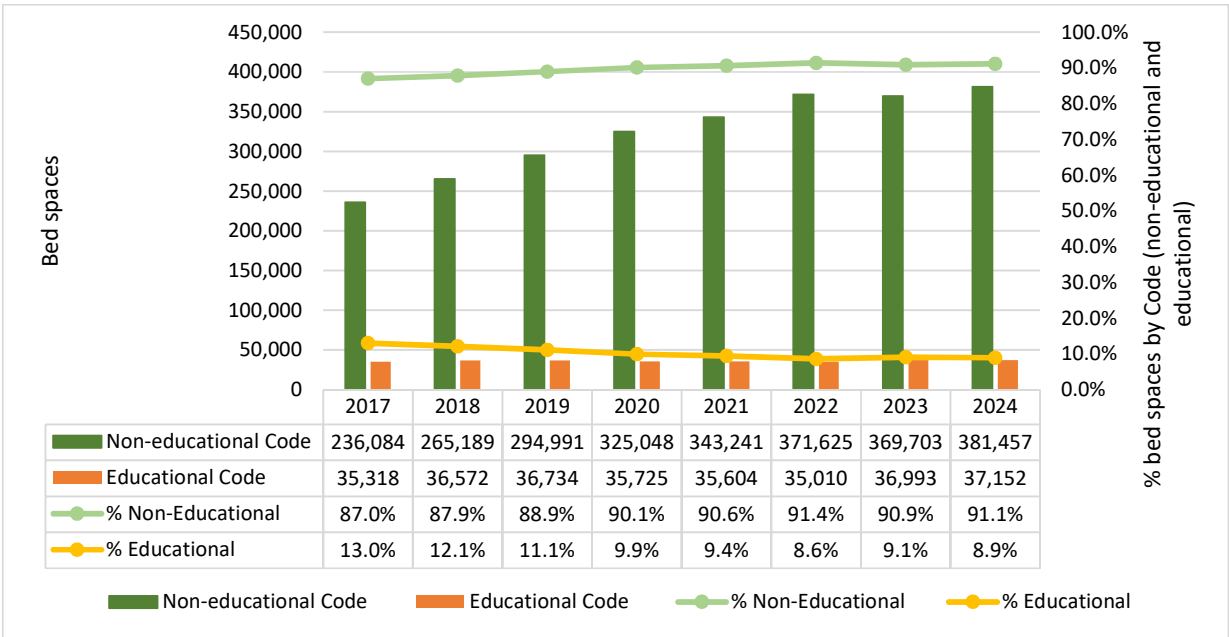
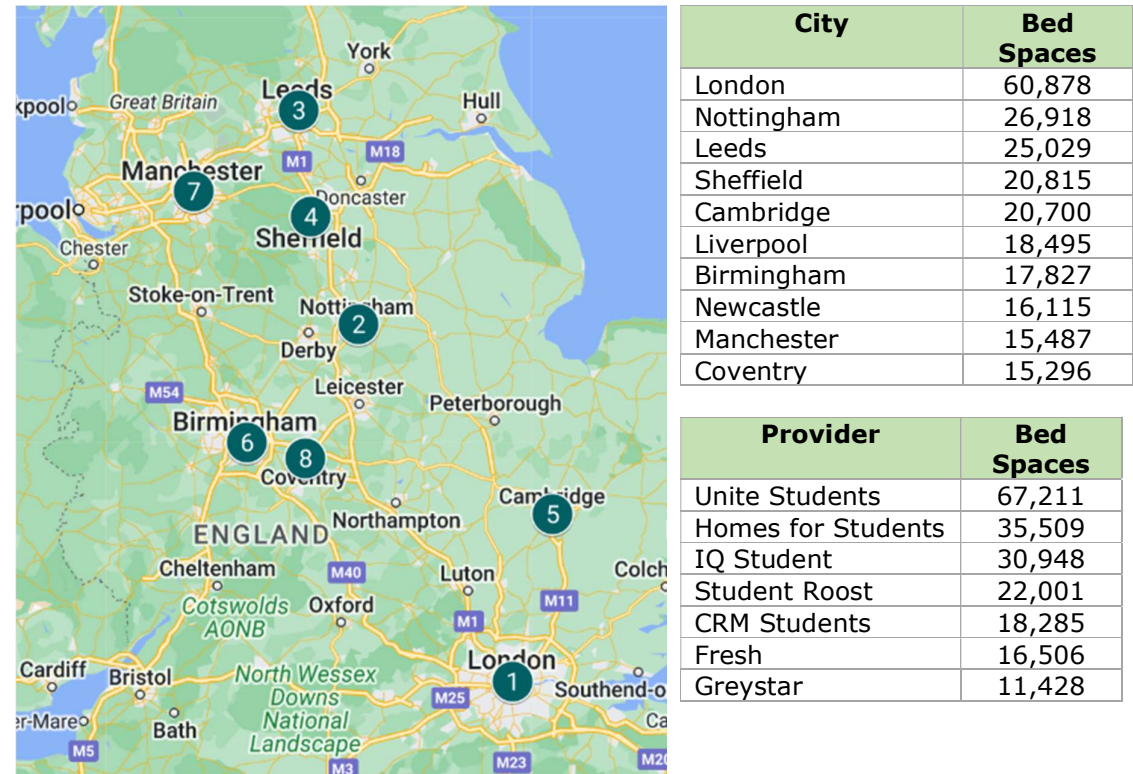


Figure 12: *Top locations for Code bedspaces, top providers 2024*



Changes in Membership

A total of 5,152 bedspaces were admitted to the Codes in 2023/24 from five new members. Five existing members withdrew or were removed from the Codes, meaning that 4,282 bed spaces left the Codes. The net impact of these changes was to increase the number of bed spaces covered by the Codes by 870.

Figure 13: Change in membership 2023/24

New members	Bed spaces	Withdrawal/removal of members	Bed spaces
Equans E&S Ltd	2,066	Amro Property Management	54
Future Generation AM	2,741	Campbell Property	298
My Student Living	79	Digs Student	2,059
Warehouse Student Ltd	234	Nido Student	1,695
Williams College	32	Yara Capital Limited	176

Only one of the five providers listed as withdrawn/removed was removed as a result of a failure to comply with Code requirements, all of the others ceased operating student accommodation

A full list of members is attached as Appendix 1.

New Developments and Late Construction

Members of the Code have informed the Code administrators that 36 new developments were initially scheduled to be opening for the start of the 2024/2025 academic year, however, 12 of these have been notified as either having slight delays in opening OR the move-in date has been delayed until the beginning of 2025.

These 36 new developments have added an additional 10,449 beds to the overall total of 417,919, for both Codes.

Figure 14: Locations of new bed spaces 2023/24

Location	Number of Developments	Number of Providers	Number of Bed Spaces
Aldershot	1	1	128
Bath	1	1	335
Belfast	3	3	1,237
Birmingham	1	1	167
Brighton	1	1	156
Bristol	3	2	1,410
Cambridge	1	1	90
Dundee	3	2	367
Glasgow	1	1	169
Leeds	4	3	1,349
Leicester	2	2	533
London	2	2	1,206

Location (Cont....)	Number of Developments	Number of Providers	Number of Bed Spaces
Newcastle Under Lyme	1	1	273
Northampton	1	1	203
Nottingham	8	6	2,464
Oxford	1	1	164
Salford	1	1	24
Stoke-on-Trent	1	1	174

The number of new development visits is significantly less than in previous years, and this in part reflects various challenges that the sector is facing. From a verification perspective, these visits can be problematic if delays occur to the opening of the site and/or a phased opening is required. Providers are required to notify the Code administrators where delays are expected and, when this is the case, the verifiers allocated such visits are made aware of this, and this year the Code was notified of 13 buildings which experienced a delay of one type or another.

Nine out of the thirteen delayed new buildings won't be opening until January 2025 at the earliest, and in each case the provider concerned has notified the Code of what action has been taken with respect to both notifying the students of the delay in advance and offering alternative accommodation/release from agreements.

Two sites were delayed opening until either mid/late September or early October and one of those is subject to phased openings. However, the provider is supplying regular updates on progress with these.

In the case of one of the buildings in Nottingham, it was delayed opening as the provider was awaiting certification from the local authority, so although the building was ready to open, they were not able to do so until Nottingham City Council let them do so.

The remaining delayed building is in Salford and the provider is in discussions with the Codes about the reasons for this.

Governance

The Codes Consortium

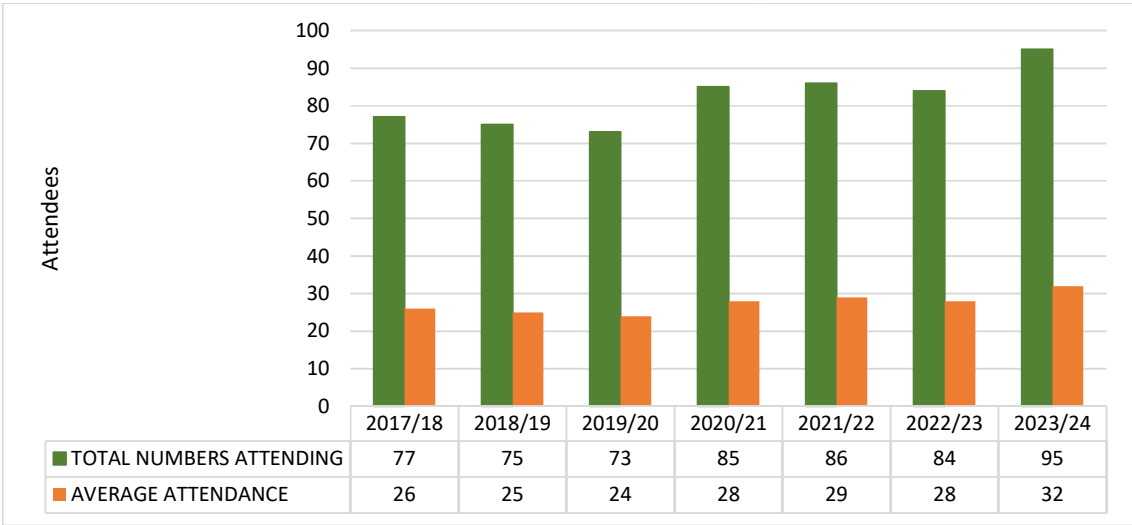
The [Codes Consortium](#) has joint ownership of the Codes and includes Unipol, the Accreditation Network UK and the NUS. The Consortium is responsible for the overall governance and operations of the Codes, and appoints the Chairs of the Tribunal and Audit Panel.

In 2023, the Consortium proposed a number of potential changes to the content of the Code for Educational Establishments and discussed possible candidates for the position of Committee of Management Chair. In July 2024 Richard Kington was appointed to the post.

Committee of Management

The [Committee of Management](#) has overall operational responsibility for the functioning of the Codes. Three meetings are held each year. Attendance has improved significantly since 2019-2020, and in 2023/24 attendance was the highest on record at 95 attendees, and an average attendance per meeting of 32.

Figure 15: Attendance at Committee of Management meetings



At the July 2024 meeting, the Committee approved the appointment of Richard Kington as its new Chair.

Audit Panel

The National Codes [Audit Panel](#) includes the current members of the verification team, each of whom either has direct experience of managing student accommodation or is a former environmental health officer. The Audit Panel, which met on five occasions between the start of July 2023 and the end of June 2024, had two independent co-chairs, but this changes in July 2024 to one.

Figure 16: Audit Panel: current membership

Panel Member	Credentials of the Audit Panel
Ms Claire Baxter - Chair	- two former Environmental Health Officers (Richard Lord, Andrew Luck and Philip Moxon) - two have previously been regional managers or directors involved in the management of privately-operated PBSA developments (Sam Bailey-Watts, Rachel Campey and Beth Raine) - five have been heads of service of university-owned and -operated accommodation (Derek Goss, David Robertson and William Wilson) - one currently manages PBSA developments for a housing charity (Jakub Pietruszewski)
Mr Sam Bailey-Watts - verifier	
Andrew Luck - verifier	
Rachel Campey - verifier	
Ms Wendy Evans & Mr Darren Smith - Cambridge Colleges	
Mr Derek Goss – verifier	
Mr Richard Lord – verifier	
Mr Philip Moxon – verifier	
Mr Jakub Pietruszewski – verifier	
Ms Beth Raine - verifier	
Mr David Robertson – verifier	
Ms Victoria Tolmie-Loverseed – Unipol	
Mr William Wilson – verifier	
Vacancy – NUS	

Two members of the verification team stood down in August 2023 and have since been replaced for the start of the 2024/25 verification visits programme.

Tribunal membership

The Tribunal membership is made up of a Chair, two Vice-Chairs, and representatives of the Codes Consortium and Committee of Management. Referrals are made initially to the Chair of the Tribunal, who has the power to determine whether to involve the Vice-Chairs and/or request a hearing of the full Tribunal. Hearing proceedings formally provide for the participation of representatives from the relevant students' unions, educational establishments and local authorities.

The current Tribunal Chair, Mr John Martin (a barrister and acknowledged expert in the field of housing law) has occupied the office since the Tribunal first came into operation.

The Chair is supported by two Vice-Chairs, who are reappointed on a regular basis. Usually, one of these posts is nominated by the NUS, whilst the other is nominated from the provider members on the Committee of Management.

The Tribunal provides for a further six members, nominated by provider members of the Committee of Management and by the Codes Consortium. Current members serving in this category are:

John Martin (Chair)
 Keith White (Vice Chair)
 Victoria Tolmie-Loverseed (ANUK)
 Nikki Verity (Unipol)
 Jane Crouch (Owner Community Rep)
 Allan Hilton (Owner Community Rep)
 Silke Dent (Owner Community Rep)

Further consideration is being given to the most appropriate and effective means of recruitment to help fill the vacant posts.

Appendix 1: List of members 2023/24

The Code for Educational Establishments (37,152 beds)

Backstage Academy	Nottingham Trent University
Belfast Bible College	Pembroke College, Cambridge
Blackpool and Fylde College	Peterhouse, Cambridge
Chichester College	Queens' College, Cambridge
Christ's College, Cambridge	Robinson College, Cambridge
Churchill College, Cambridge	The Royal Veterinary College
Clare College, Cambridge	SCIO
Clare Hall College, Cambridge	Selwyn College, Cambridge
Corpus Christi College, Cambridge	Sidney Sussex College, Cambridge
Darwin College, Cambridge	Stranmillis University College
Downing College, Cambridge	St Catharine's College, Cambridge
Emmanuel College, Cambridge	St Edmund's College, Cambridge
Fitzwilliam College Cambridge	St John's College, Cambridge
Foundation for International Education	Trinity College, Cambridge
Girton College, Cambridge	Trinity Hall, Cambridge
Gonville & Caius, Cambridge	University of the Arts, London
Homerton College, Cambridge	University of Chichester
Hughes Hall, Cambridge	University of Greenwich
Jesus College, Cambridge	University of Hertfordshire
King's College, Cambridge	University of Leeds
Leeds Beckett University	Warwickshire College
Loughborough College	West Dean College
Lucy Cavendish College, Cambridge	Westminster College, Cambridge
Magdalene College, Cambridge	Williams College
Murray Edwards College, Cambridge	Wolfson College, Cambridge
Newnham College, Cambridge	

The Code for Non-Educational Providers (381,457 beds)

A2 Dominion Group Ltd	Kaplan NT Ltd
Abodus	Kexgill
Acis Group Ltd	Lee Abbey London
Affordable Accommodation for Students	LIV Student
Almero Student	Luna Students
Aparto	Manor Villages
Ashwell House	Mansion Property Management
ASN Capital Lettings Ltd	McComb (Bolton)
Axo Student Living	McComb Students
Baaz Properties	Megaclose Ltd
Beyond the Box Student Limited	Mezzino
Boudicca One Ltd	My Student Living
BPS Developments	Njoy Student Accommodation
Campus Living Villages	Novel Student
Carter Jonas	Now Student Living
Catavyst	Nurtur Student Living
City Block Ltd	Parklane Properties
Cityheart Living (Scotland) Limited	Portergate Property Management
Cloud Homes	Prime Student Living
Code Student Accommodation	Primo Property Management
Collegiate AC Ltd	Realstar Management (UK) Limited
Congregational Federation	Reed Residential Ltd
CRM Students	Sanctuary Students
Derwent Students	Scape Student Living Ltd
Downing Students	Southern Housing
Dwell Student Living	The Stay Club Limited
Equans E&S Ltd	Student Beehive
Fawleybridge Student Accommodation	Student Castle Ltd
FHP Student Living	Student Cribs
FD Asset Management Ltd	Student Facility Management Limited
Flare	Student Living by Sodexo
Fresh Student Living	Student Roost
Future Generation AM	Study Inn
Gather Students Ltd	SuperUni Housing
Get Living	TJ Thomas
GLSP	True Student Limited
Goodenough College	U Student Group Ltd
Graysons Properties	Unilife
Greystar Europe Holdings Ltd	Uni2rent Ltd
Guy Chester Centre	Union House Management Co
Hamstead Campus	Unipol Student Homes
S Harrison Group Ltd	UNITE
Hello Student Management	Universal Student Living
Herbal Hill Ltd	UPP Broadgate Park Ltd
Homelets Bath	UPP Nottingham Ltd
Homes for Students	Urbanest UK Ltd
Host Student	Vita Student Management Ltd
Iconinc	Warehouse Student Ltd
Infrastructure Investments Ltd	West One Student Accommodation
INTO Newcastle University	Yugo
IQ Student Accommodation Services Ltd	Zebra Housing Association
	Zone Management

