

Housing Supply Coordination Task Force For Dublin

Quarter 1 2019 Returns



May 2019



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Pleanála agus Rialtais Áitiúil
Department of Housing,
Planning and Local Government



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Executive Summary

The 2019 Quarter 1 Dublin Housing Taskforce returns indicate a 10% increase in the cumulative number of units within Tier 1 and Tier 2A respectively, when compared with the same period in 2018 (i.e. 48,816 in Q1 2018 vs 53,586 in Q1 2019).

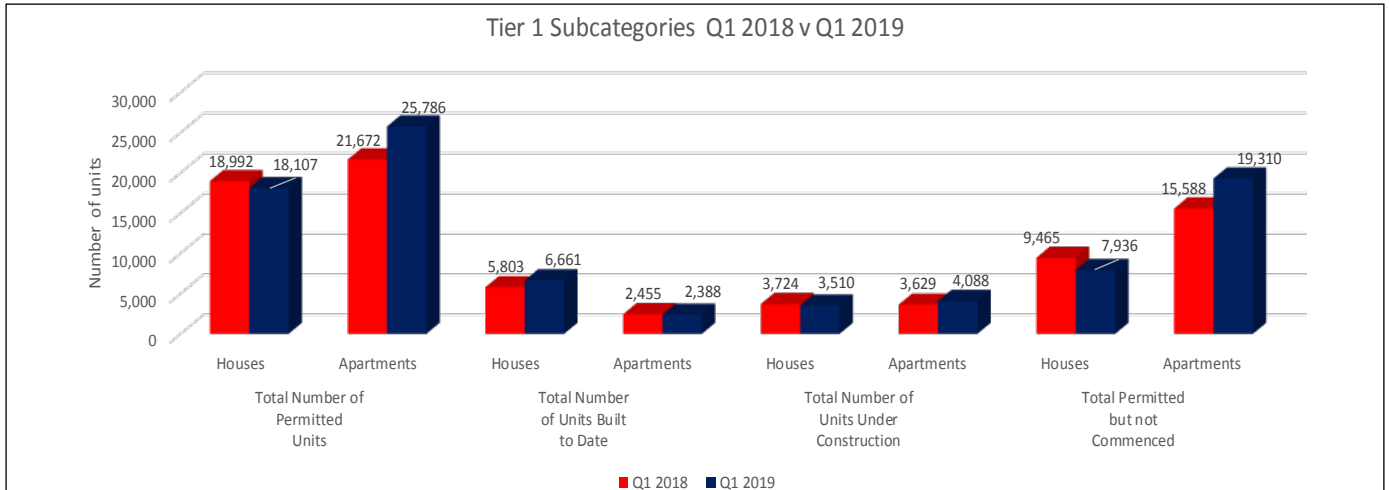


Table A: Tier 1 Subcategories Annual Comparative Analysis

In the analysis of construction activity, overall ongoing activity across development sites in the Dublin Region, reflected in the cumulative number of ‘units built to date’ and ‘units under construction’, is up 7% from 15,611 units in Q1 2018 to 16,647 units in Q1 2019.

The total number of residential units ‘built to date’ showed an increase of 10% during the year (i.e. 8,258 in Q1 2018 compared with 9,049 in Q1 2019). This increase is in spite of the number of units in fully completed developments removed from Tier 1 to Tier 2C, as discussed below, and appears to be a positive trend. The number of houses ‘built to date’ showed an increase of 858 (15%) while the number of apartments ‘built to date’ showed a slight decrease of 67 (-3%).

There was a slight increase in the ‘total number of units under construction’ this quarter in a year on year comparison i.e. from 7,353 in Q1 2018 to 7,598 in Q1 2019. While there was a decrease in the number of houses under construction from 3,724 in Q1 2018 to 3,510 in Q1 2019 (-6%), this was more than made up for by the increase in the number of apartments under construction from 3,629 in Q1 2018 to 4,088 in Q1 2019 (13%).

Development sites which were fully completed this quarter comprised of 1,243 residential units (1,146 houses and 97 apartments), with the most significant number of completions occurring in the South Dublin County Council administrative area where 8no. sites were fully completed comprising of 810 houses and 18 apartments. This is the third consecutive quarter whereby development sites comprising of 1,000+ units were fully completed and moved to Tier 2C.

This increase in fully completed development sites represents a positive trend and may be an indicator for increased construction activity through 2019, taking into consideration the increase in units with planning permission, but not yet commenced, (i.e. 27,246 units in Q1 2019 to 25,053 units in Q1 2018).

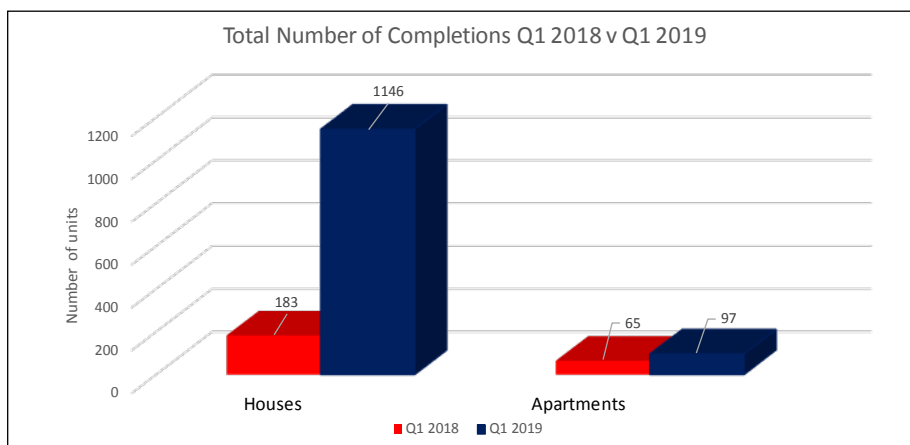


Table B: Residential Dwelling Completions Comparative Analysis

With regard to extant planning permissions which have yet to commence construction, the outlook is especially positive from a housing supply capacity perspective. Planning permission remains in place in the Dublin Region for the development of a combined total of 27,246 residential units in Q1 2019, up from 25,053 in Q1 2018, which represents a 9% increase.

While a significant quantum of housing units are awaiting the commencement of construction, there has been a decrease (16%) in the ‘total permitted but not commenced’ number of houses (i.e. 9,465 in Q1 2018 to 7,936 in Q1 2019). However, there has been an increase (24%) in the number of apartment units permitted but not commenced i.e. 15,588 units in Q1 2018 to 19,310 units in Q1 2019. This continues the emerging trend of recent quarters of an apparent change in housing typology with a shift towards higher density apartment developments.

With regards to the number of active sites in the Dublin region, on a year on year comparison, the number of sites has increased by 3% from 173 sites in Q1 2018 to 178 sites in Q1 2019.

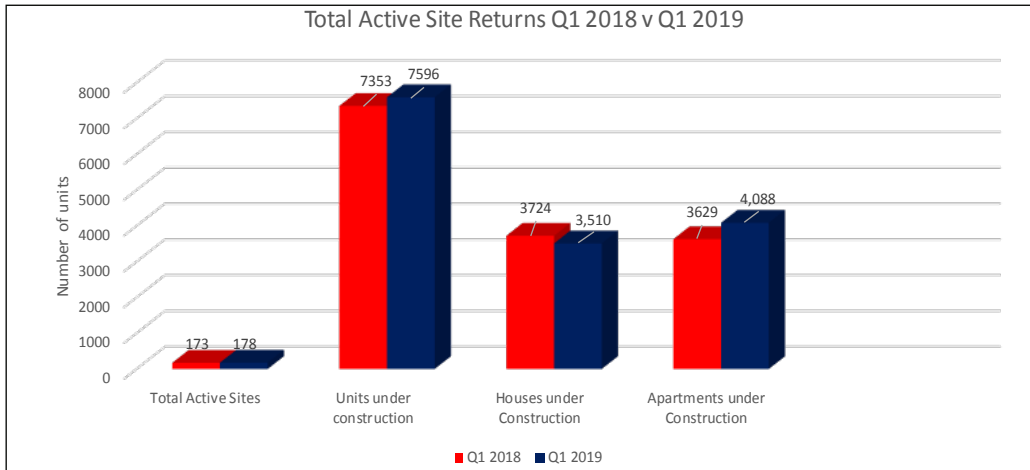


Table C: Active Sites Annual Comparative Analysis

In relation to planning applications awaiting decisions, there was a 19% increase in the overall number of Tier 2A residential units from 8,152 in Q1 2018 to 9,693 in Q1 2019. This represents an increase of 12% compared from Q4 2018 when the total was 8,689 units. The total number of houses recorded in the Tier 2A return decreased by 44% (i.e. 2,750 in Q1 2018 to 1,539 in Q1 2019), while the total number of apartments recorded in Tier 2A increased by 51% (i.e. 5,402 in Q1 2018 to 8,154 in Q1 2019) for the same period, including a significant increase of 17% from 6,977 in Q4 2018. This further supports the evident shift towards higher density apartment developments as likely to continue as the ratio of houses to apartments in Tier 2A, for which planning permission is currently being sought, stands at 1:5 across the four Dublin local authorities (1,539 houses : 8,154 apartments).

The adoption of Ministerial Apartment Guidelines (March) and Building Height Guidelines (December) in 2018 may have influenced the timing of commitments to apartment developments with a high number currently going through the planning process or recently permitted but not commenced. It is anticipated that this will be reflected in apartment construction activity through 2019.

1. Introduction

The Quarter 1 2019 Housing Task Force returns for the 4 Dublin local authorities are provided below. In support of the submitted tables and in the interests of clarity, a definition of each of the Tiers is also provided.

2. Returns Tables

Table 1: Each Local Authorities Cumulative Totals for Tiers 1 and 2A

	Tier 1		Tier 2A		Totals
	Tier 1 Totals		Tier 2A Totals		
	Houses	Apartments	Houses	Apartments	
DCC	1,605	9,861	85	2,084	13,635
DLRCC	2,685	8,603	333	2,528	14,203
SDCC	4,106	2,044	380	1,407	7,937
FCC	9,711	5,278	741	2,135	17,865
Total	18,107	25,786	1,539	8,154	53,640

Table 2: Tier 1 Subcategories Data

	Tier 1 Subcategories							
	Total Number of Permitted Units		Total Number of Units Built to Date		Total Number of Units Under Construction		Total Permitted but not Commenced	
	Houses	Apartments	Houses	Apartments	Houses	Apartments	Houses	Apartments
DCC	1,605	9,861	295	304	304	1,610	1,006	7,947
DLRCC	2,685	8,603	1,035	1,165	357	1,176	1,293	6,262
SDCC	4,106	2,044	1,383	24	1,106	340	1,617	1,680
FCC	9,711	5,278	3,948	895	1,743	962	4,020	3,421
Total	18,107	25,786	6,661	2,388	3,510	4,088	7,936	19,310

Table 3: Total Units in Houses & Apartments

	Tier 2A Subcategories	
	Total Number of Units	
	Houses	Apartments
DCC	85	2,084
DLRCC	333	2,528
SDCC	380	1,407
FCC	741	2,135
Total	1,539	8,154

Note: Please be advised that this figure is subject to change and represents a 'snapshot' in time.

Table 4: Tier 2B Data Subcategories

	Tier 2B Subcategories			
	Core Strategy Potential Residential Yield	Units on Serviced Land & Ready to be Developed	Units Requiring Infrastructure & Investment	Number of Units Dependent on Irish Water Investment
	Total Units	Total Units	Total Units	Total Units
DCC	52,600	23,621	6,085	0
DLRCC	33,600	2,080	9,609	4,400
SDCC	37,809	10,744	0	0
FCC	49,541	15,551	13,578	19,980
Total	173,550	51,996	29,272	24,380

Note 1: The subcategory, as titled 'Core Strategy Potential Residential Yield' does not form part of any calculation of the overall figure for Tier 2B.

Note 2: The core strategy figure is not limited to developments of 10 or more units.

Table 5: Total Number of Units Completed per Quarter

	Tier 2C Subcategories							
	Total Number of Units		Total Number of Units		Total Number of Units		Total Number of Units	
	Quarter 1		Quarter 2		Quarter 3		Quarter 4	
	Houses	Apartments	Houses	Apartments	Houses	Apartments	Houses	Apartments
DCC	0	0						
DLRCC	149	38						
SDCC	810	18						
FCC	187	41						
Total	1,146	97						

Note 3: Table 5 provides the total number of units completed, whereby an entire development has been completed. Please be advised that this table is for information purposes only and does not form part of the calculation of the overall figure for Tier 1.

3. Quarterly Highlight Reports

3.1 Dublin City Council

Year on Year comparison

Q1 2019 compared with Q1 2018:

- 5% increase on the **number of sites with planning permission** from 132 sites to 139 sites.
- 5% increase in the **total number of units with planning permission** from 10,927 to 11,466.
- 39% decrease in **active sites** from 41 sites to 25 sites.
- 29% decrease in the **number of units under construction** from 2,695 to 1,914.

Quarterly Highlights

- There were **1,450 residential units granted** planning permission this quarter under 14no. separate planning applications.
- A further **9 applications are pending** decisions that have the potential to provide 627 residential units in the city.

Strategic Housing Developments (SHD)

- There were **2 SHD applications** with granted permission by An Bord Pleanála this quarter that would provide a total of **492 residential units**, located at Rathgar, Dublin 6 and Marino, Dublin 9 under ABP case no. 303133 and ABP case no. 303296 respectively.
- There is **1 SHD application** for student accommodation granted by An Bord Pleanála that would provide **289 student accommodation bed spaces** at Nolan Seafoods Ltd, Rathdown Road, Dublin 7 under ABP no. 302164.
- There are **4 SHD applications** awaiting decisions of An Bord Pleanála that would potentially provide a cumulative total of **693 residential units**, one of which includes **235 student bedspaces**.



Total No. of Sites with Planning Permission

5% increase
from 132 to 139



Total No. of Units with Planning Permission

5% increase
from 10,927 to 11,466



Total No. of Active Sites

39% decrease
from 41 to 25



Total No. of Units Under Construction

29% decrease
from 2,695 to 1,914

3.2 Dun Laoghaire Rathdown County Council

Year on Year comparison

Q1 2019 compared with Q1 2018:

- 18% increase in the number of sites with planning permission from 83 sites to 98 sites.
- 65% increase in the total number of units with planning permission from 6,849 to 11,288.
- 8% increase in active sites from 38 sites to 41 sites.
- 11% increase in the number of units under construction from 1,377 to 1,533.
- 120% increase in the number of completions in this quarter from 13 to 156.

Quarter Highlights

- **3,733 residential units built to date or under construction** in Q1 2019 reflecting a slight increase in overall activity of 4%, up from 3,593 units in previous Q4 2018.
- **28% increase** in the total number of residential units in **Tier 2A** seeking planning permission this quarter at 2,915 units from 2,284 units in previous quarter, primarily made up of an increase in the number of apartments from 1,943 units to 2,582 units.
- **Construction commenced** on **Cherrywood Town Centre** development site in the Cherrywood SDZ permitted by DLR under DZ17A/0862, including **1200+** units.
- The sum total of units with planning permission this quarter is running at approximately **1:3 houses:apartments**. Units in the planning system awaiting final determination this quarter are running at nearly **1:8 houses:apartments**.

Strategic Housing Developments (SHD)

- **Construction commenced** on **900+ unit SHD** site at **Clay Farm, Ballyogan** granted permission under ABP ref. 301522-18.
- Planning permission granted for **184 units** in parcel TC6 of Cherrywood Town Centre.
- In the last weeks of **Q1 4 new SHD applications** were lodged for a total of **731 units**.
- Combined total of residential units in **SHDs in Tiers 1 and 2A** currently stands at **3,324 units** – of which houses account for only 764 (23%).



Total No. of Sites with Planning Permission

18% increase from 83 to 98



Total No. of Units with Planning Permission

65% increase from 6,849 to 11,288



Total No. of Active Sites

8% increase from 38 to 41



Total No. of Units Under Construction

11% increase from 1,377 to 1,533

3.3 South Dublin County Council

Year on Year comparison

Q1 2019 compared with Q1 2018:

- 13% increase in the **number of sites with planning permission** from 53 sites to 60 sites.
- 15% increase in the **total number of units with planning permission** from 5,368 to 6,150.
- 16% increase in the **number of active sites** from 25 sites to 29 sites.
- 44% increase in the **number of units under construction** from 1,001 to 1,446.
- 52% increase in the **number of units completed** in the 12 month period to end Q1 2019 (1,303 units) compared to the 12 month period to end Q1 2018 (857 units).

Quarter Highlights

- 10% decrease in the **total number of residential units with planning permission** this quarter at 6,150 from 6,842 in previous quarter reflecting the significant number of houses moved to Tier 2C.
- **8 development sites fully completed** and moved to Tier 2C this quarter providing for a total of **828 units** (810 houses and 18 apartments).
- 7% increase in the **total number of residential units under construction** this quarter at 1,446 from 1,354 in previous quarter, primarily made up in increase in apartment construction from 202 units to 340.
- **Adamstown SDZ** (LIHAF/MUHDS) continues to progress steadily overall in terms of construction activity. The rate of construction has increased with 624 units under construction this quarter, as opposed to 578 units in Q4 2018. The rate of completions of residential units decreased this quarter with 103 units completed, compared to 59 units in Q4 2018.

Strategic Housing Developments (SHD)

- Permission **granted** by An Bord Pleanála for a SHD of **526 residential units** in Fortunestown.
- **Construction commenced** on 2 SHD sites in Fortunestown with permission for cumulative total of **1,000+ units** under ABP Ref Nos. 302398-18 and 300555-18
- 2 SHD applications **lodged** with An Bord Pleanála for a cumulative total of 346 build to rent apartments and 222 shared accommodation bedspaces, both in Cookstown, Tallaght.
- 9 SHD applications are currently at **pre-planning** with An Bord Pleanála and SDCC with potential for **4,896 units**.
- 18 SHD applications are currently at **preliminary stage** of pre-planning with SDCC with potential for **6,161 units**.



Total No. of Sites with Planning Permission
13% increase
from 53 to 60



Total No. of Units with Planning Permission
15% increase
from 5,368 to 6,150



Total No. of Active Sites
16% increase
from 25 to 29



Total No. of Units Under Construction
44% increase
from 1,001 to 1,446

3.4 Fingal County Council

Year on Year comparison

Q1 2019 compared with Q1 2018:

- 8% increase in the number of sites with planning permission from 124 to 134;
- 14% decrease in the number of units with planning permission from 17,522 to 14,989;
- 22% increase in number of active sites from 68 to 83 sites;
- 19% increase in the number of units under construction from 2,280 to 2,705 units;
- 36% increase in the number of units completed and occupied in 12 month period to end Q1 2019 (1,754 units) compared to the 12 months to end Q1 2018 (1,294 units).

Quarter Highlights

- 7% increase in the number of units 'Under Construction' with 2,708 units this quarter up from 2,527 in Q4 2018.
- 5% increase in the number of active sites with 83 sites active this quarter from 79 in Q4 2018.
- **Hansfield SDZ** construction continues to progress. There is a consistent rate of construction activity in this quarter with 196 units under construction. Rate of completions in this quarter is consistent with 54 units completed, from 51 units in the previous quarter. There are 5no. active permissions. There is a total of 912 completions to date. Permission was granted for 213 units under FW17A/0234. There are currently 3no. applications under consideration (c.900 Units).
- **Oldtown/Mooretown (LIHAF/MUHDS)** lands continue to progress with 22 units completed in this quarter compared to 22 units in the previous quarter. The rate of construction activity has slightly increased, with 101 units under construction compared to 94 units in the previous quarter. 5no. sites are currently active on these lands.
- **Donabate (LIHAF/MUHDS)** continues to progress however at a slower rate of completions in this quarter, 32 units completed, down from 49 units in the previous quarter. The rate of construction activity, however, has increased significantly this quarter with 300 units under construction, up from 186 units in the previous quarter.



Total No. of Sites with Planning Permission
8% increase
from 124 to 134



Total No. of Units with Planning Permission
14% decrease
from 17,522 to 14,989



Total No. of Active Sites
22% increase
from 68 to 83



Total No. of Units Under Construction
19% increase
from 2,280 to 2,705

Appendix 1

Appendix 1: Data Submission Parameters

The following parameters apply to the Housing Task Force Returns data:

1. All of the housing categories contained within the Housing Task Force Returns are based on the inclusion of planning applications with a threshold of 10 or more units, with the exception of the Core Strategy figure, which corresponds to the overall potential residential yield, as per each Planning Authority's Development Plan.
2. The Housing Task Force Returns exclude all social housing units. In the interest of clarity, all Part V residential units are included in the Housing Task Force Returns.
3. The Housing Returns exclude all Part 8 planning applications.
4. The Housing Returns exclude all student accommodation (both on-campus and off-campus).

Tier Definitions

Tier 1

This tier relates to sites where a final grant of planning permission has been obtained and the permission can be implemented immediately. This tier includes some developments that have commenced, but does not include developments that have been completed. This tier does not include phasing.

Within this tier a series of subcategories exist, which are characterised as follows:

- a) **Total Number of Permitted Units:** This is based on the number of units permitted in the relevant Tier 1 planning permissions. These figures include developments in which some housing units have already been completed, or are currently underway, as indicated in Table 2 under the columns, as titled 'Total Number of Units Built to Date' and 'Number of Units Under Construction'. The totals for the three columns in Tier 1, as titled 'Total Number of Units Built to Date', 'Total Number of Units Under Construction' and 'Total Permitted but not Commenced' together should equate to the figure in 'Number of Permitted Units'.
- b) **Total Number of Units Built to Date:** This figure should demonstrate how many units have been completed to date in the relevant Tier 1 sites, and does not relate to how many units have been completed during a particular quarter. Developments which have been completed should be subsequently removed from this subcategory and captured in the subcategory, as titled 'Total Number of Units Completed'. In order to illustrate the type of information that should be included in this category, the following example applies: *where planning permission has been granted for 100 units on a particular site and only 60 have been built to date, a figure of 60 units should be included in this category.*
- c) **Total Number of Units Under Construction:** This subcategory should show how many units are under construction within a given quarter, and, in conjunction with the previous two columns (subcategories a & b above), to also calculate how many units remain to be constructed i.e. to identify the current quantum of potential housing supply, as indicated in the column, as titled 'Total Permitted but not Commenced'.

Tier 2 (a)

This tier relates to sites where a planning application has been lodged with a planning authority, or is within the appeal period of 4 weeks of the date of the decision of the planning authority, or is the subject of an appeal to An Bord Pleanála. In the interests of clarity, this figure should include any applications that have been refused or granted planning permission by the Local Authority but are the subject of an appeal to An Bord Pleanála. Please be advised that this figure is subject to change and represents a 'snapshot' in time.

Tier 2 (b)

This tier consists of lands which are zoned and where there is an appropriate planning policy in place or being put in place, for example, lands as contained within a Development Plan, a Local Area Plan, and/or a Strategic Development Zone. The overall figure for Tier 2 (b) is representative of the cumulative total of the following subcategories: 'Units on Serviced Land & Ready to be Developed', 'Units Requiring Infrastructure & Investment' and the 'Number of Units Dependent on Irish Water Investment'. In the interests of clarity, these subcategories are characterised as follows:

- a) Development Plan Core Strategy Residential Development: This figure provides for the overall potential residential yield, as per each Planning Authority's Development Plan core strategy. Please note that this figure does not form part of the calculation of the overall quantum for Tier 2B.
- b) Units on Serviced Land & Ready to be Developed: This figure demonstrates the total number of units that are developable without the requirement of additional infrastructural investment on the part of state, semi-state and local authority bodies, and/or other parties acting on their behalf.
- c) Units Requiring Infrastructural Investment: These sites represent those that are subject to constraint and require significant investment in infrastructure on the part of state, semi-state and local authority bodies, and/or other parties acting on their behalf.
- d) Number of Units Dependent on Irish Water Investment: This figure is based on the total number of residential units that are dependent on the provision of infrastructure, as referred to under the Irish Water Investment Programme. Please note that following the provision of this infrastructure, the total number of units formerly dependent on Irish Water Investment will then be reallocated to the subcategory, as titled 'Units on Serviced Land & Ready to be Developed'.

Tier 2 (c)

This table is provided for information purposes only and should not be used to calculate the overall figure for Tier 1. This table should provide information on the total number of units that are completed within a completed development, per quarter, with a starting point based on the Q1 2016 figures. In order to illustrate the type of information that should be included in this category, the following example applies: *where planning permission has been granted for 100 units on a particular site, and 100 units have been built and completed, a figure of 100 units should be included in this category. Only instances when the overall quantum of development that relates to a site has been fully completed, will those number of residential units be included in this category.*

Other Data Returns & Definitions

Active Sites

Active sites are defined as any site that is subject to construction activity, which directly relates to the provision of housing. It is recognised that a commencement notice could be issued for a certain quantum of housing, which will also include the delivery of ancillary infrastructure e.g. access roads and underground utilities. In this regard, once construction activity has commenced on a site that relates to the delivery of housing, inclusive of all supporting physical infrastructure, this will be considered an active site under the meaning of these guidelines.

Quarter Highlights

As part of the quarterly returns, each local authority shall provide a highlight report, which will consist of a brief narrative of any significant housing related activity or developments that may have occurred in each Local Authority's administrative area during the relevant reporting period e.g. the granting of planning permission for a significant development or a decision issued by An Bord Pleanála for a large housing scheme. In addition to this, the highlight report should also capture the following indicators that relate to each **Local Authority**:

- Year on Year (YoY) comparative analysis of the total number of sites with planning permission within a Local Authority's administrative area;
- YoY comparison of the total number of units with planning permission;
- YoY comparison of 'active' site's construction activity;
- YoY comparative analysis of the total number of units under construction;
- YoY comparison of the total number of housing completions.

