

Housing Supply Coordination Task Force For Dublin

Quarter 2 2019 Returns



August 2019



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



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Executive Summary

The 2019 Quarter 2 Dublin Housing Taskforce returns indicate an 8% increase in the cumulative number of units within Tier 1 and Tier 2A respectively, when compared with the same period in 2018 (i.e. 51,289 in Q2 2018 vs 55,291 in Q2 2019).

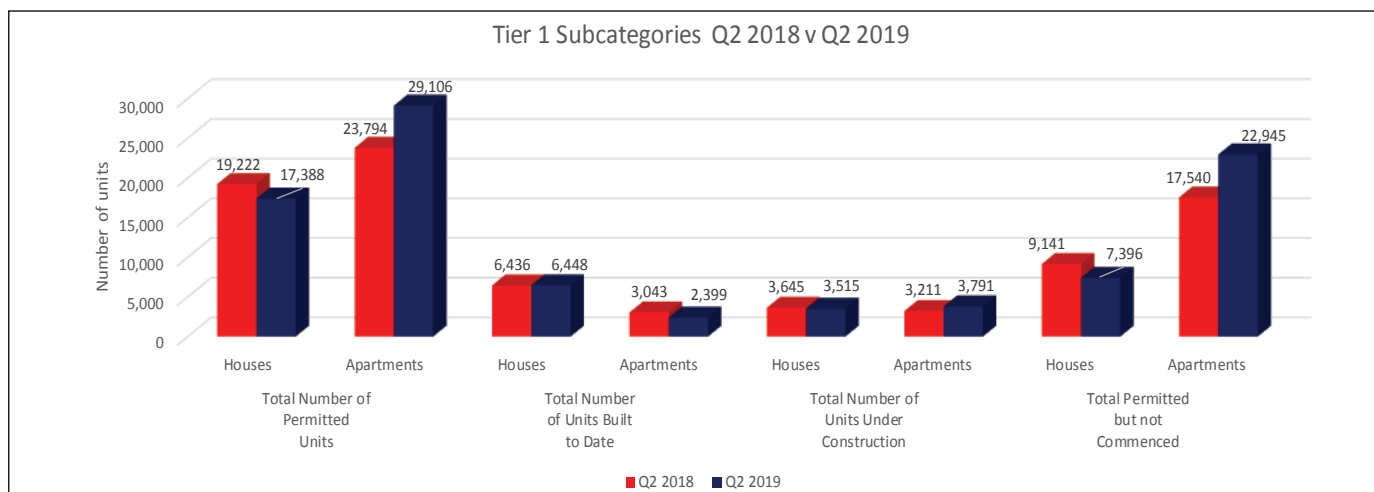


Table A: Tier 1 Subcategories Annual Comparative Analysis

In the analysis of construction activity, the total number of ‘units built to date’ showed a decrease of 7% during the year, i.e. 9,479 in Q2 2018 compared with 8,847 in Q2 2019. The decrease in the total number of residential units ‘built to date’ in Tier 1 is understandable in the context of the number of units in fully completed developments removed from Tier 1 to Tier 2C, discussed below, which has been consistently high in the last four quarters. The number of houses ‘built to date’ increased by 12no. units (0%) while the number of apartments ‘built to date’ showed a decrease of 644no. units (-21%).

There was an increase of 7% in the ‘total number of units under construction’ this quarter in a year on year comparison i.e. from 6,856 in Q2 2018 to 7,306 in Q2 2019. There was a decrease of 4% in the number of houses under construction from 3,645 in Q2 2018 to 3,515 in Q2 2019 which was made up for by an 18% increase in the number of apartments under construction from 3,211 in Q2 2018 to 3,791 in Q2 2019. The number of units under construction in Dublin City has declined in the year-on-year comparison of the last four quarters, while, from a housing supply capacity perspective, the number of units permitted but not commenced in Dublin City has increased consistently over the same period, currently standing at 9,476no. units. National policy updates (Ministerial Apartment Guidelines in March 2018 and Height Guidelines in December 2018) may have influenced the timing of commitments to apartment developments with a high number recently permitted or going through the planning process as represented in Tier 2A.

The number of apartments under construction has now been greater than the number of houses under construction for three consecutive quarters across the Dublin region. There are variances between the local authorities with Dublin City and Dún Laoghaire Rathdown consistently showing significantly more activity in apartments under construction compared to houses. Apartment activity in Fingal and South Dublin has been growing and indicators for the future show a potential shift towards apartments as the predominant housing type to be provided, as demonstrated by the number of units permitted but not commenced as of Q2 2019 (1,362 houses : 2,023 apartments in South Dublin and 3,764 houses : 4,640 apartments in Fingal).

Analysis of Strategic Housing Developments (SHDs) in the Dublin region indicates that planning activity at various stages of the process is strong, however this has not yet translated to construction activity. Of the 6,012no. residential units granted permission by An Bord Pleanála under the SHD process across the four local authorities, no residential units have been built to date and 337no. units are currently under construction. This level of activity represents 6% of the overall number of units granted permission under the SHD process. While the SHD process has only been in place for 2 years, which may explain a lower than average rate, this is significantly less than the overall level of activity for all of Tier 1 at 35% with a cumulative total of 16,153no. units built to date and/or under construction out of a total of 46,494no. permitted units in the Dublin region.

Development sites which were fully completed this quarter comprised of 1,641no. residential units (923no. houses and 718no. apartments). This was distributed across the four local authorities, but most pronounced in the Fingal and Dublin City administrative areas where fully completed development sites comprised of 563no. units (495no. houses and 68no. apartments) and 467no. units (17no. houses and 450no. apartments), respectively.

This is the fourth consecutive quarter whereby development sites comprising of 1,000+ units were fully completed and moved to Tier 2C which represents a positive trend and may be an indicator for increased construction activity through 2019 as developments are finished and activity moves on to other sites with planning permission, but not yet commenced construction.

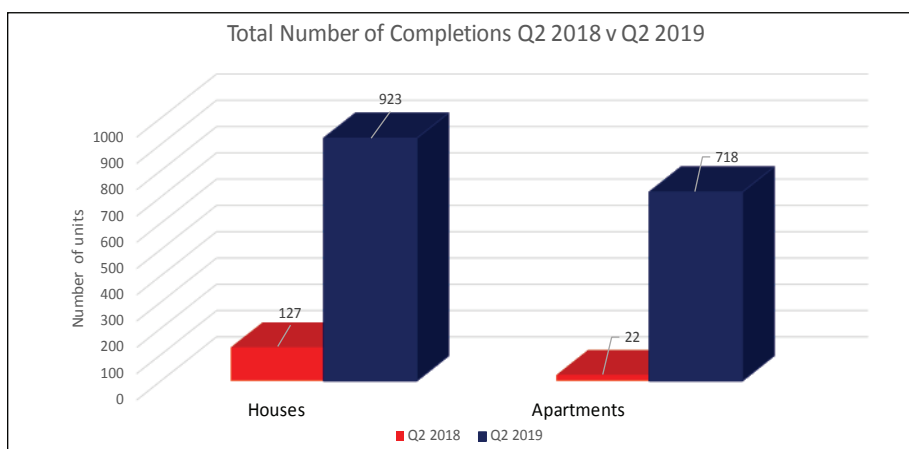


Table B: Residential Dwelling Completions Comparative Analysis

With regard to extant planning permissions which have yet to commence construction, the outlook is positive from a housing supply capacity perspective. Planning permission remains in place in the Dublin Region for the development of a combined total of 30,341no. residential units in Q2 2019, up from 26,681 in Q2 2018, which represents a 14% increase.

While a significant quantum of housing units are awaiting the commencement of construction, there has been a decrease (19%) in the 'total permitted but not commenced' number of houses from 9,141 in Q2 2018 to 7,396 in Q2 2019. However, there has been an increase (31%) in the number of apartment units permitted but not commenced from 17,540 units in Q2 2018 to 22,945 units in Q2 2019. This continues the 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 decreased by 5% from 178 sites in Q2 2018 to 169 sites in Q2 2019. The fact that the number of units under construction has risen in the same period by 7% from 6,856 to 7,306 units demonstrates that activity is more concentrated on a higher number of residential units on less sites, a likely result of the trend towards apartment construction which is more focussed and resource intensive, but provides for a higher number of units.

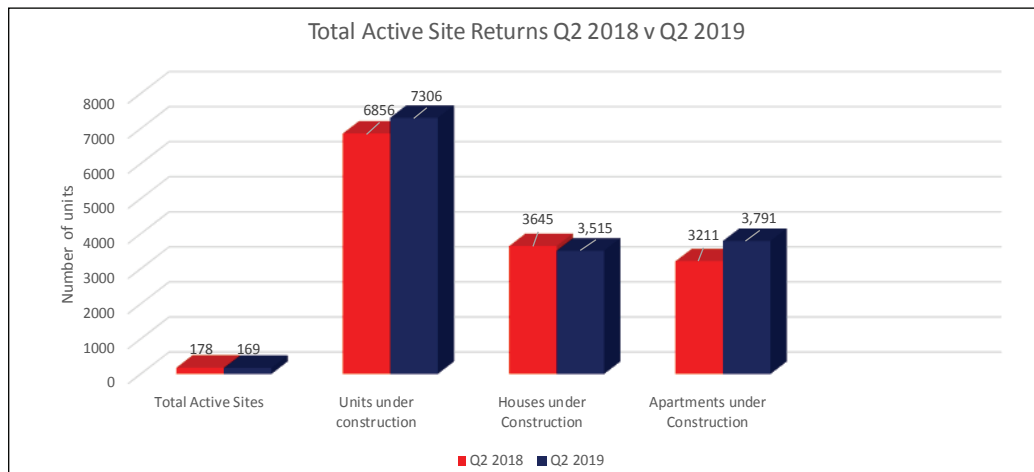


Table C: Active Sites Annual Comparative Analysis

In relation to planning applications awaiting decisions, there was a 6% increase in the overall number of Tier 2A residential units from 8,273 in Q2 2018 to 8,797 in Q2 2019. The total number of houses recorded in the Tier 2A return decreased by 47% (i.e. 2,607 in Q2 2018 to 1,380 in Q2 2019), while the total number of apartments recorded in Tier 2A increased by 31% (i.e. 5,666 in Q2 2018 to 7,417 in Q2 2019) for the same period. 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 (1,380 houses : 7,417 apartments).

1. Introduction

The Quarter 2 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	1,481	10,148	52	4,149	15,830
DLRCC	2,819	10,059	163	2,040	15,081
SDCC	3,865	2,472	479	408	7,224
FCC	9,223	6,427	686	820	17,156
Total	17,388	29,106	1,380	7,417	55,291

Table 2(a): 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	1,481	10,148	313	220	281	1,339	887	8,589
DLRCC	2,819	10,059	937	1,314	470	1,081	1,383	7,693
SDCC	3,865	2,472	1,407	16	1,096	433	1,362	2,023
FCC	9,223	6,427	3,791	849	1,668	938	3,764	4,640
Total	17,388	29,106	6,448	2,399	3,515	3,791	7,396	22,945

Table 2(b): Tier 1 Breakdown of Strategic Housing Developments Data

	Tier 1 Breakdown of SHDs			
	Total Number of Permitted Units	Total Number of Units Built to Date	Total Number of Units Under Construction	Total Permitted but not Commenced
	Total Units	Total Units	Total Units	Total Units
DCC	1,214	0	0	1,214
DLRCC	3,227	0	36	3,191
SDCC	1,421	0	166	1,255
FCC	150	0	135	15
Total	6,012	0	337	5,675

Note: The SHD figures are included in Table 2(a) and extracted here for information purposes.

Table 3: Tier 2A Total Units in Houses & Apartments

	Tier 2A Subcategories	
	Total Number of Units	
	Houses	Apartments
DCC	52	4,149
DLRCC	163	2,040
SDCC	479	408
FCC	686	820
Total	1,380	7,417

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	23,102	6,085	0
DLRCC	33,600	979	9,609	4,400
SDCC	37,707	10,642	0	0
FCC	49,541	15,551	13,578	19,980
Total	173,448	50,274	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	17	450				
DLRCC	149	38	142	100				
SDCC	810	18	269	100				
FCC	187	41	495	68				
Total	1,146	97	923	718				

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

Q2 2019 compared with Q2 2018:

- 4% increase on the **number of sites with planning permission** from 138 sites to 143 sites.
- 6% increase in the **total number of units with planning permission** from 10,906 to 11,629.
- 50% decrease in **active sites** from 42 sites to 21 sites.
- 25% decrease in the **number of units under construction** from 2,173 to 1,620.

Quarterly Highlights

- There were **4no. development sites fully completed** and moved to Tier 2C this quarter comprising a total of **450 residential units** (17no. houses and 450no. apartments).
- There were **1,821 residential units granted** planning permission this quarter under 12no. separate planning applications.
- A further **16no. planning applications are pending** decisions that have the potential to provide **3,102no. residential units** in the city.

Strategic Housing Developments (SHD)

- A **SHD application** was granted permission by An Bord Pleanála this quarter that would provide a total of **265no. Build to Rent apartments**, located on Davitt Road, Dublin 12 under ABP case no. 303435. Part of SHD ABP no. 303436, described hereunder with student accommodation, also included 37no. Build to Rent apartments.
- There were **2no. SHD applications** for student accommodation granted permission by An Bord Pleanála that would provide for a cumulative total of **492no. student accommodation bed spaces** at Parnell St, Dublin 1 and Mill Street, Dublin 8 under ABP case nos. 303615 and 303436 respectively.
- There are **5no. SHD applications** awaiting decisions of An Bord Pleanála that would potentially provide a cumulative total of **1,826no. residential units**.



Total No. of Sites with Planning Permission

4% increase
from 138 to 143



Total No. of Units with Planning Permission

6% increase
from 10,906 to 11,629



Total No. of Active Sites

50% decrease
from 42 to 21



Total No. of Units Under Construction

25% decrease
from 2,173 to 1,620

3.2 Dun Laoghaire Rathdown County Council

Year on Year comparison

Q2 2019 compared with Q2 2018:

- **30% increase** in the **number of sites with planning permission** from 87 sites to 113 sites.
- **49% increase** in the **total number of units with planning permission** from 8,642 to 12,878.
- **No change** in the **number of active sites** at 41 sites.
- **12% increase** in the **number of units under construction** from 1,388 to 1,551.
- **69% increase** in the **number of completions** in this quarter from 198 to 335.

Quarterly Highlights

- **14% increase** in the **total number of residential units with planning permission** this quarter at 12,878 from 11,288 in previous quarter.
- There were **5no. development sites fully completed** and moved to Tier 2C this quarter comprising of a total of **242no. residential units** (142no. houses and 100no. apartments).
- 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 **1:12 houses:apartments**.

Strategic Housing Developments (SHD)

- **Planning permission granted** by An Bord Pleanála for: 1. **221no. units** (211 apartments and 10 houses) at Chesterfield, Cross Avenue, Blackrock; 2. **291no. units** at St Theresa’s House/ Centre and St Teresa’s Lodge, Temple Hill, Blackrock; 3. **142no. Build-to-Rent apartments** at Roselawn and Aberdour, Stillorgan Road, Foxrock; and 4. **817no. student bed spaces** at Avid Technology International, Carmanhall Road, Sandyford Industrial Estate.
- **Planning permission refused** by An Bord Pleanála for **123no. Build-to-Rent apartments** at Fosters Avenue, Mount Merrion.
- **SHD Applications lodged** with An Bord Pleanála for: 1. **192no. units** was lodged at Clay Farm, Ballyogan Road; 2. **428no. units** at Rockbrook, Carmanhall Road, Sandyford Business District; 3. **208no. unit Build-to-Rent Shared Living Residential** scheme at The Old School House, Eblana Avenue, Dun Laoghaire.
- Combined total of residential units in **SHDs in Tiers 1 and 2A** currently stands at **3,961no. units** – of which houses account for only 597no. (15%).



Total No. of Sites with Planning Permission

30% increase
from 87 to 113



Total No. of Units with Planning Permission

49% increase
from 8,642 to 12,878.



Total No. of Active Sites

No Change
41



Total No. of Units Under Construction

12% increase
from 1,388 to 1,551

3.3 South Dublin County Council

Year on Year comparison

Q2 2019 compared with Q2 2018:

- 7% increase in the **number of sites with planning permission** from 57 sites to 61 sites.
- 10% increase in the **total number of units with planning permission** from 5,735 to 6,337.
- 22% increase in the **number of active sites** from 23 sites to 28 sites.
- 48% increase in the **number of units under construction** from 1,033 to 1,529.
- 91% increase in the **number of units completed** in the 12-month period to end Q2 2019 (1,400 units) compared to the 12-month period to end Q2 2018 (733 units).

Quarter Highlights

- There were **4no. development sites fully completed** and moved to Tier 2C this quarter comprising of a total of **369no. residential units** (269no. houses and 100no. apartments).
- **6% increase** in the **total number of residential units under construction** this quarter at 1,529 from 1,446 in previous quarter, made up by an increase in apartment construction from 340 units to 433.
- **Adamstown SDZ** (LIHAF/MUHDS) continues to progress steadily overall in terms of construction activity. 604no. units are currently under construction, slightly down from 624no. units at end of Q1 2019. There were 172no. units completed this quarter, up from 103no. units in Q1 2019.

Strategic Housing Developments (SHD)

- **Two SHD decisions** issued by An Bord Pleanála this quarter: 1. Permission **granted** for **438no. apartments and 403no. student bedspaces** in Tallaght under ABP Ref No. 303306, and 2. Permission **refused** for **150no. apartments and 222no. shared living bedspaces** in Cookstown under ABP Ref No. 303911.
- **166no. houses currently under construction** on two SHD sites in Fortunestown, under ABP Ref Nos. 302398 and 300555.
- A SHD for **196no. build to rent apartments** in Cookstown awaiting decision of An Bord Pleanála.
- 12no. SHD applications are currently at the **second stage of the process** at pre-planning with An Bord Pleanála and SDCC with potential for **5,460no. units**.
- **23no. SHD applications** are currently at the **first stage of the process** at pre-planning with SDCC with potential for **7,032no. units**.



Total No. of Sites with Planning Permission
7% increase
from 57 to 61



Total No. of Units with Planning Permission
10% increase
from 5,735 to 6,337



Total No. of Active Sites
22% increase
from 23 to 28



Total No. of Units Under Construction
48% increase
from 1,033 to 1,529

3.4 Fingal County Council

Year on Year comparison

Q2 2019 compared with Q2 2018:

- 6% increase in the number of sites with planning permission from 127 sites to 135 sites.
- 12% decrease in the total number of units with planning permission from 17,733 to 15,650.
- 10% increase in the number of active sites from 72 sites to 79 sites.
- 15% increase in the number of units under construction from 2,262 to 2,606.
- 8% decrease in the number of units completed in the 12-month period to end Q2 2019 (1,609 units) compared to the 12-month period to end Q2 2018 (1,758 units).

Quarter Highlights

- There were **7no. development sites fully completed** and moved to Tier 2C this quarter comprising of a total of **563no. residential units** (495no. houses and 68no. apartments), resulting in a reduction in the number of active sites from 83 in Q1 2019 to 79 in Q2.
- **Hansfield SDZ** construction continues to progress. There is a consistent rate of construction activity in this quarter with 156no. units under construction. The number of completions in this quarter is down from 54 units in the previous quarter to 40 units this quarter, giving a total of 912 completions to date. There are 5no. active permissions on the SDZ lands. Permission was granted this quarter for 616no. units under FW18A/0110 and 247no. units under FW18A/0161.
- **Oldtown/Mooretown** (LIHAF/MUHDS). The rate of construction activity has increased with 150no. units currently under construction compared to 101no. units in the previous quarter.
- **Donabate** (LIHAF/MUHDS) continues to progress. The rate of construction activity has increased within this quarter with an additional 69no. units under construction giving a total of 276no. units under construction. There is a consistent rate of completions, with 39no. new units completed in this quarter compared to 32no. in Q1 2019.
- **Northwood-Santry:** Over the last two quarters, there has been an increase in construction activity as well as an increase in the number of planning permissions granted. There are currently 6 extant permissions with 3 sites active. Within these active sites, there are 77no. units occupied and a total of 395no. units under construction.



Total No. of Sites with Planning Permission
6% increase
from 127 to 135



Total No. of Units with Planning Permission
12% decrease
from 17,733 to 15,650



Total No. of Active Sites
10% increase
from 72 to 79



Total No. of Units Under Construction
15% increase
from 2,262 to 2,606

Appendix 1

Appendix 1: Data Submission Parameters

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

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) and shared living accommodation.

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.

