

Housing Supply Coordination Task Force For Dublin

Quarter 3 2017 Returns



November 2017



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



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Executive Summary

The 2017 Quarter 3 Dublin Housing Taskforce returns indicate a 7% increase in the cumulative number of units within tier 1 and tier 2A respectively, when compared with the same period in 2016 (i.e. 44,000 in Q3 2016 vs 47,108 in Q3 2017). This change was affected by a positive year-on-year increase in tier 1 houses under construction, with a 55% increase recorded in house construction activity (i.e. 2,429 in Q3 2016 vs 3,763 in Q3 2017).

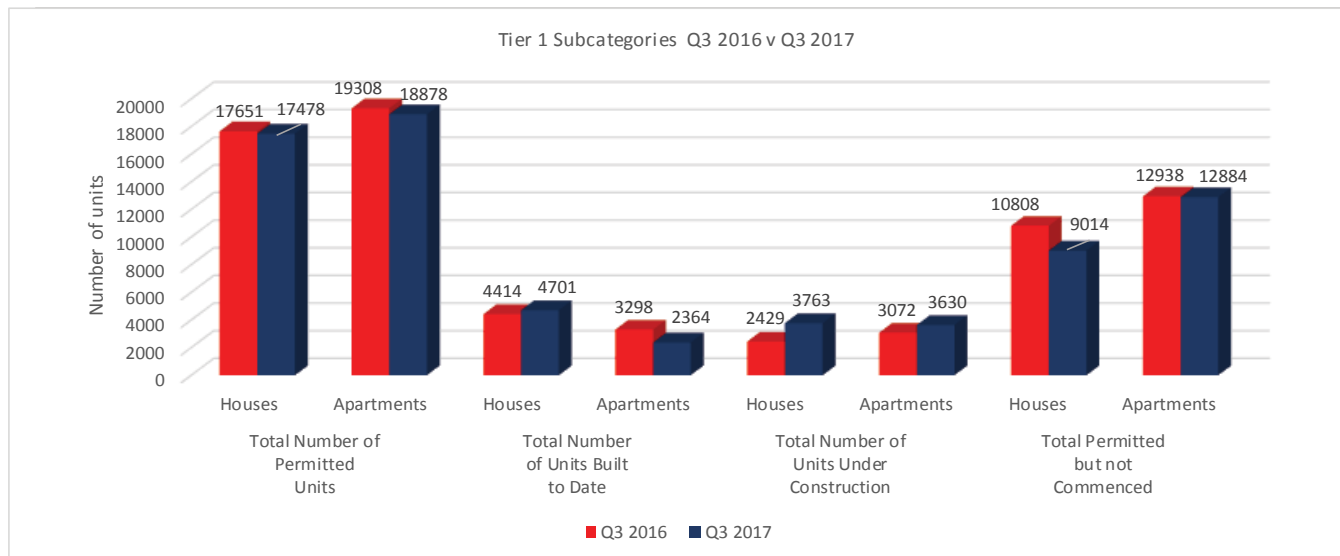


Table A: Tier 1 Subcategories Annual Comparative Analysis

In terms of construction activity, whilst the total number of residential units ‘built to date’ showed a decrease during the year (i.e. 7,065 in Q3 2017 compared with 7,712 in Q3 2016), the number of houses ‘built to date’ showed an increase of 287 residential dwellings when compared with the same period in 2016 (4,414 in Q3 2016 compared to 4,701 in Q3 2017). This is supported by a 34% increase in the ‘total number of units under construction’, from 5,501 in Q3 2016 to 7,393 in Q3 2017. In addition, there was a 55% increase in the total number of houses that were under construction, going from 2,429 units in Q3 2016 to 3,763 units in Q3 2017. Interestingly, while there was a decrease in the total number of houses completed (i.e. 265 in Q3 2017 compared with 273 in Q3 2016), there was a notable increase in the total number of apartments completed (i.e. 379 in Q3 2017 compared to 18 in Q3 2016).

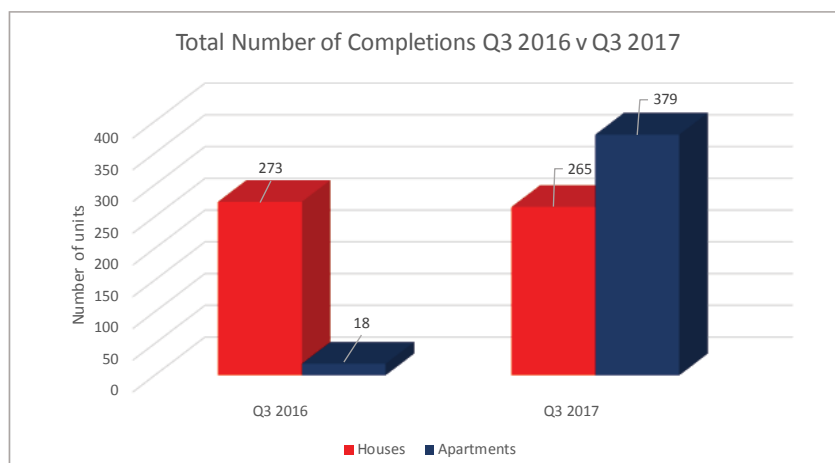


Table B: Annual Completions Comparison

With regard to extant planning permissions that have yet to commence construction, the outlook is relatively positive from a housing supply capacity perspective, whereby planning permission remains in place for the development of a combined total of 21,898 residential units in the Dublin region. While a significant quantum of housing units await the commencement of construction, there has been a reduction in the 'total permitted but not commenced' number of houses (i.e. 9,014 in Q3 2017 vs. 10,808 in Q3 2016) and apartments (i.e. 12,884 in Q3 2017 vs. 12,938 in Q3 2016). This indicates a higher level of construction activity in the past 12 months, which is further supported by an increase of 41 active construction sites (i.e. 167 in Q3 2017 vs. 126 in Q3 2016).

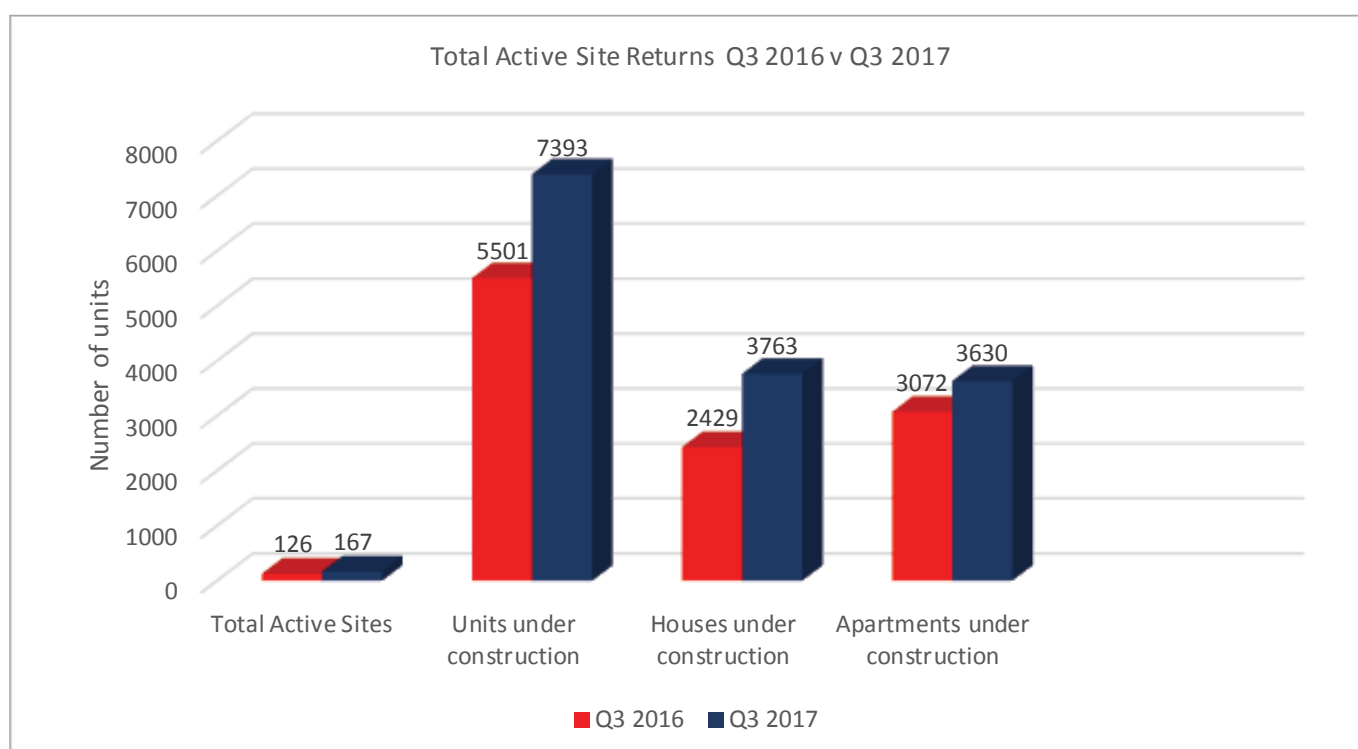


Table C: Active Sites Annual Comparative Analysis

Notably, there was a 53% increase in the overall tier 2A residential units from 7,041 in Q3 2016 to 10,752 in Q3 2017. The total number of houses recorded in the tier 2A return increased marginally by 5% (i.e. 3,288 in Q3 2017 vs. 3,128 in Q3 2016) and the total number of apartments recorded in tier 2A increased significantly by 91% (i.e. 7,464 in Q3 2017 vs. 3,913 in Q3 2016) in the same period. This highlights a substantial increase in the amount of apartments, which have been the subject of planning applications in comparison to 12 months ago.

1. Introduction

The Quarter 3 2017 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	1976	6196	120	3179	11471
DLRCC	2212	4559	710	2968	10449
SDCC	4228	1432	689	180	6529
FCC	9,062	6,691	1,769	1,137	18,659
Total	17478	18878	3288	7464	47108

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	1976	6196	289	48	682	1643	1005	4505
DLRCC	2212	4559	610	771	566	1004	1036	2784
SDCC	4228	1432	967	390	1046	104	2215	938
FCC	9062	6691	2835	1155	1469	879	4758	4657
Total	17478	18878	4701	2364	3763	3630	9014	12884

Table 3: Total Units in Houses & Apartments

	Tier 2A Subcategories	
	Total Number of Units	
	Houses	Apartments
DCC	120	3179
DLRCC	710	2968
SDCC	689	180
FCC	1,769	1,137
Total	3288	7464

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	52600	8756	6085	0
DLRCC	33600	7248	9609	4400
SDCC	40723	12467	0	0
FCC	49541	15551	13578	19980
Total	176464	44022	29272	24380

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	44	0	300	0	16	15		
DLRCC	14	510	45	0	19	17		
SDCC	0	0	500	278	0	0		
FCC	331	30	321	277	230	347		
Total	389	540	1166	555	265	379		

Note: 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

Dublin City Council Housing Supply Coordination Taskforce Q3 2017

Year on Year comparison

Q3 2017 compared with Q3 2016:

- 17.8% increase on the **number of sites** with planning permission from 101 sites to 119 sites.
- 20.6% increase in the **total number of units** with planning permission from 6777 to 8172 units.
- 73.9% increase in **active sites** from 23 sites to 40 sites.
- 95.5% increase in the number of **units under construction** from 1189 to 2325.



Total No. of Sites with Planning Permission

17.8% increase from 101 to 119



Total No. of Units with Planning Permission

20.6% increase from 6777 to 8172



Total No. of Active Sites

73.9% increase from 23 to 40



Total No. of Units Under Construction

95.5% increase from 1189 to 2325

Dun Laoghaire Rathdown Housing Supply Coordination Taskforce Q3 2017

Year on Year comparison

Q3 2017 compared with Q3 2016:

- 10% increase in the number of sites with planning permission from 73 sites to 80 sites.
- 7% decrease in the total number of units with planning permission from 7274 to 6771 units.
- 12% decrease in active sites from 42 sites to 37 sites.
- 22% decrease in the number of units under construction from 2003 to 1570.
- 8% decrease in the number of completions in this quarter from 156 to 143.

Quarter Highlights

- Strategic Housing Development (SHD) application for 927 dwelling units (365 houses + 562 apartments) at Clay Farm in Ballyogan was lodged with An Bord Pleanála during this quarter.
- Cherrywood Strategic Development Zone (SDZ) Town Centre application including 1,269 apartments was lodged with DLR during this quarter.
- An infill scheme of 97 dwelling units (69 houses + 28 apartments) was completed at Hazelbrook Square in Churchtown during this quarter.
- A high profile scheme of 492 apartments at Rockbrook in Sandyford was refused by An Bord Pleanála on appeal (First Party) during this quarter.
- Completions for this quarter running at approximately 1:2 houses: apartments (45:98).
- The Year on Year (YoY) comparison analysis show a 12% decrease in the number of active sites. In this regard, it should be noted that 24% of the active sites identified in Q3 2016 are now completed developments, supplying c.977 dwelling units.



Total No. of Sites with Planning Permission

**10% increase
from 73 to 80**



Total No. of Units with Planning Permission

**7% decrease
from 7174 to 6771**



Total No. of Active Sites

**12% decrease
from 42 to 37**



Total No. of Units Under Construction

**22% decrease
from 2003 to 1570**

South Dublin County Council Housing Supply Coordination Taskforce Q2 2017

Year on Year comparison

Q3 2017 compared with Q3 2016:

- 0 units completed, compared to 35 units.
- 34% increase in the number of houses built to date from 723 to 967.
- 40% increase in number of active sites from 20 sites to 28 sites.
- 69% increase in the number of units under construction from 679 to 1,150.
- 6% decrease in the total number of units with planning permission from 6,026 to 5,660.
- 19% increase in total number of sites with planning permission from 47 to 56.

Quarter Highlights

- Planning permission granted for 27 residential units under SD16A/0249 at Coldcut Road, Liffey Valley.
- Planning permission granted for new link road in Ballycullen LAP, which will assist in delivery of c.1,000 residential units. This application is subject to an appeal to An Bord Pleanála.
- Planning permission granted under SD17A/0121 for 133 dwellings at Ballycullen. This application is subject to an appeal to An Bord Pleanála.



Total No. of Sites with Planning Permission

**19% increase
from 47 to 56**



Total No. of Units with Planning Permission

**6% decrease
from 6026 to 5660**



Total No. of Active Sites

**40% increase
from 20 to 28**



Total No. of Units Under Construction

**69% increase
from 679 to 1150**

Fingal County Council Housing Supply Coordination Taskforce Q2 2017

Year on Year comparison

Q3 2017 compared with Q3 2016:

- 1.8% decrease in the number of sites with planning permission in Tier 1 from 110 to 108.
- 6.7% decrease in the number of units with planning permission from 16,882 to 15,753.
- 18% increase in active sites from 50 to 59 sites.
- 44% increase in the number of units under construction from 1,630 to 2,348 units.
- 4% increase in the number of units completed and occupied in 12 month period to end Q3 2017 (1,166 units) compared to the 12 months to end Q3 2016 (1,120 units).

Quarter Highlights

- Hansfield SDZ continues to progress well with 90 units completed in this Quarter and 119 more units under construction.
- Planning permission granted by An Bord Pleanála for a development of 176 residential units at Belcamp Hall (FCC Reg Ref No. F15A/0609, ABP Ref. PL06F.248052).
- 18% increase in construction activity between Q2 and Q3 with 2,348 units currently under construction.
- 5 more active sites in Q3.



Total No. of Sites with Planning Permission

**1.8% decrease
from 110 to 108**



Total No. of Units with Planning Permission

**6.7% decrease
from 16882 to 15753**



Total No. of Active Sites

**18% increase
from 50 to 59**



Total No. of Units Under Construction

**44% increase
from 1630 to 2348**

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.**

