

Housing Supply Coordination Task Force For Dublin

Quarter 3 2019 Returns



December 2019



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



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Executive Summary

The 2019 Quarter 3 Dublin Housing Taskforce returns indicate the following trends.

Planning Permissions

A 15% increase in the cumulative number of units permitted and units proposed within current planning applications (Tier 1 and Tier 2A respectively), when compared with the same period in 2018 (i.e. 52,285 in Q3 2018 vs 60,263 in Q3 2019). (Please refer to Appendix 1 for a definition of the different tiers.)

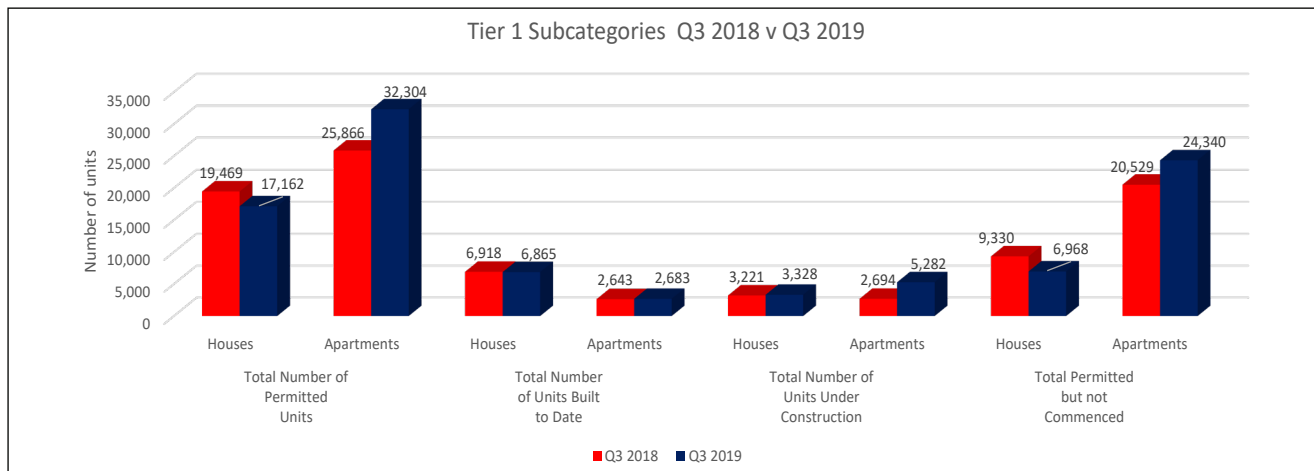


Table A: Tier 1 Subcategories Annual Comparative Analysis

Units Built to Date (ie. completed units on currently active sites)

In the analysis of construction activity, the total number of ‘units built to date’ showed a decrease of 0.1% during the year, i.e. 9,561 in Q3 2018 compared with 9,548 in Q3 2019. This decrease in the total number of residential units ‘built to date’ in Tier 1 is negligible at 13 no. units. Closer analysis of the figures indicates that the number of apartments ‘built to date’ showed an increase of 40 no. units (1.5%) while the number of houses ‘built to date’ decreased by 53 no. units (0.8%).

Units under Construction (ie. units being constructed on currently active sites)

There was a significant increase of 46% in the ‘total number of units under construction’ this quarter in a year on year comparison (i.e. from 5,915 in Q3 2018 to 8,610 in Q3 2019). The underlying trend over the 2016-19 period is illustrated in Figure 1 and this indicates a strong increase over time in the Dublin Region, particularly in the last year.

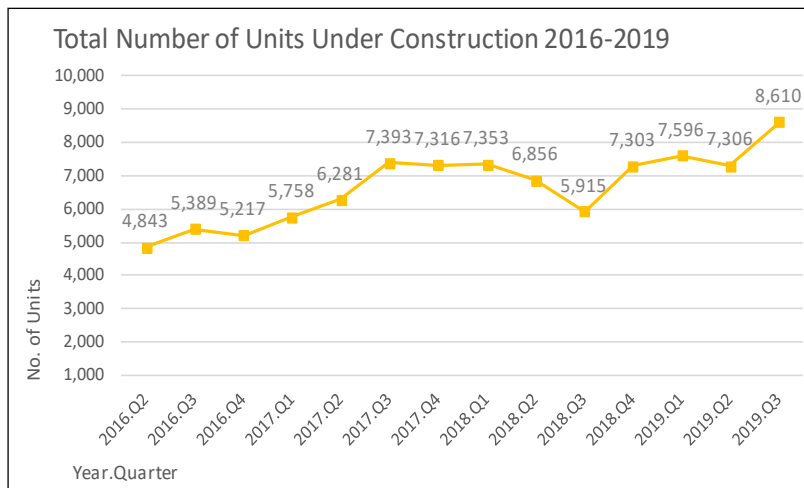


Figure 1

The majority of this comprised a 96% increase in apartments under construction from 2,694 in Q3 2018 to 5,282 in Q3 2019 which reflects a longer term shift towards apartment construction in Dublin over the last few years. The number of apartments under construction has now been greater than the number of houses under construction for four consecutive quarters across the Dublin region (see Figure 2).

There was a minor 3% increase in the number of houses under construction from 3,221 in Q3 2018 to 3,328 in Q3 2019.

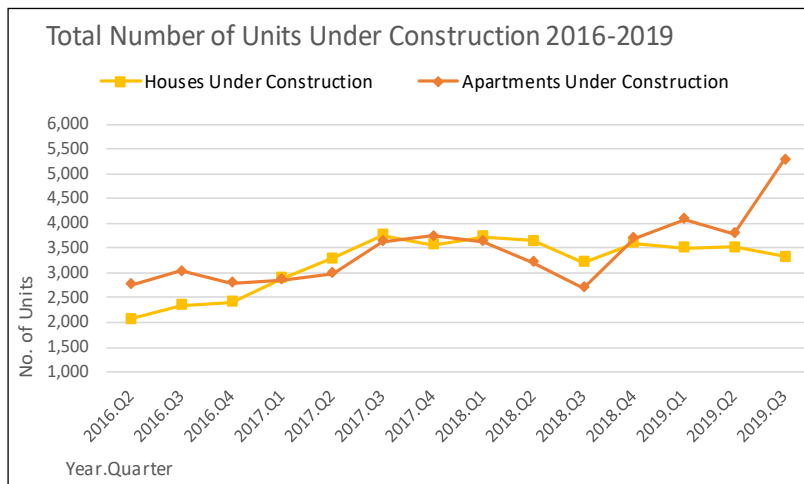


Figure 2

It had been considered in recent quarters that national policy updates (Ministerial Apartment Guidelines in March 2018 and Building Height Guidelines in December 2018) may have influenced the timing of commitments to apartment developments with a consistent increase in the number of units permitted but not commenced. This appears to have now translated into on-site activity with a significant increase in the number of apartments under construction this quarter compared to the same period last year, particularly in Dublin City (see Figure 3).

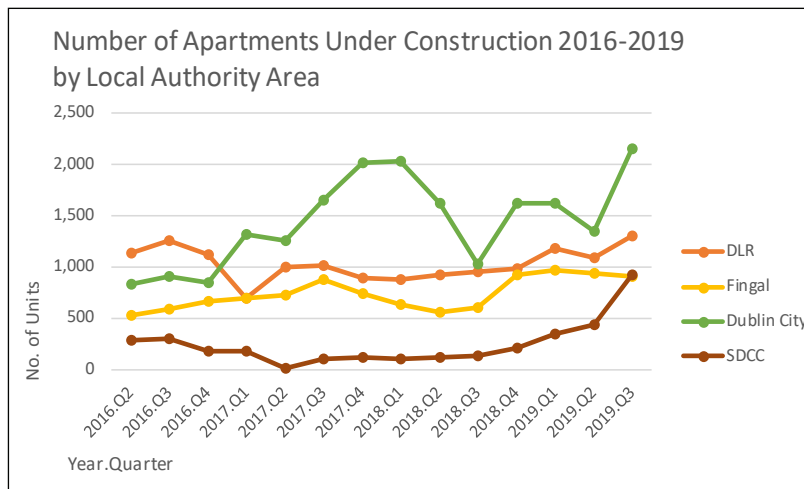


Figure 3

Strategic Housing Developments

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 into construction activity. Of the 8,506 no. residential units granted permission by An Bord Pleanála under the SHD process across the four local authorities, 102 no. residential units have been built to date and 1,064 no. units are currently under construction. This level of activity represents 14% of the overall number of units granted permission under the SHD process. This rate is significantly less than the overall level of activity for all of Tier 1 at 37% with a cumulative total of 18,158 no. units built to date and/or under construction out of a total of 49,502 no. permitted units in the Dublin region.

Developments Completed in Full (see Table 5 below)

Development sites which were fully completed this quarter comprised 489 no. residential units (332 no. houses and 157 no. apartments). This was most pronounced in the Dun Laoghaire Rathdown and Fingal County Council administrative areas where fully completed development sites comprised 166 no. units (101 no. houses and 65 no. apartments) and 275 no. units (220 no. houses and 55 no. apartments), respectively.

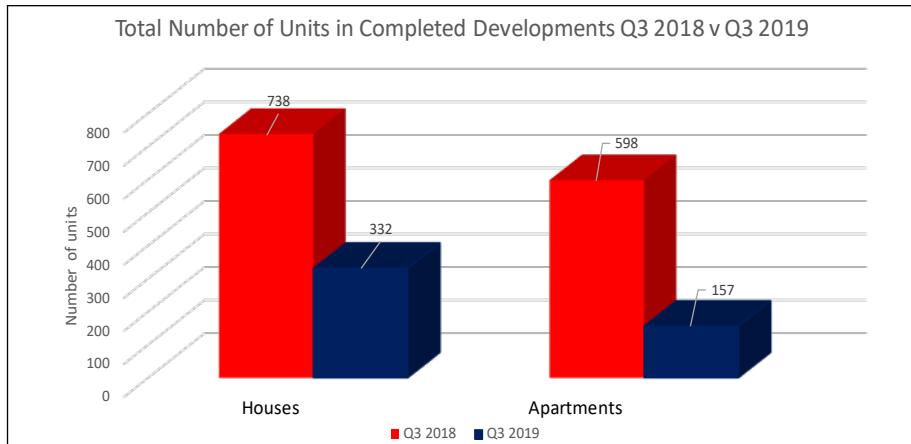


Table B: Residential Dwelling Completions Comparative Analysis

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 31,308 no. residential units in Q3 2019, up from 29,859 in Q3 2018, which represents a 5% increase.

While a significant quantum of housing units are awaiting the commencement of construction, there has been a decrease (25%) in the 'total permitted but not commenced' number of houses from 9,330 in Q3 2018 to 6,968 in Q3 2019. However, there has been an increase (19%) in the number of apartment units permitted but not commenced from 20,529 units in Q3 2018 to 24,340 units in Q3 2019. This continues the trend in recent quarters of an apparent change in housing typology with a shift towards higher density apartment developments.

Active Sites

With regard to the number of active sites in the Dublin region, on a year on year comparison, this has increased by 7% from 174 sites in Q3 2018 to 187 sites in Q3 2019. The number of units under construction has risen in the same period by 46% from 5,915 to 8,610 units, indicating the trend towards apartment construction, which is more focussed and resource intensive, but provides for a higher number of units.

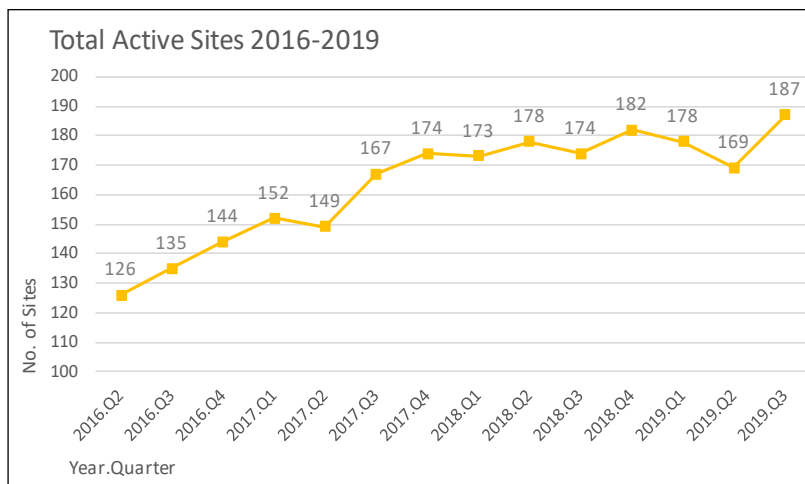


Figure 4

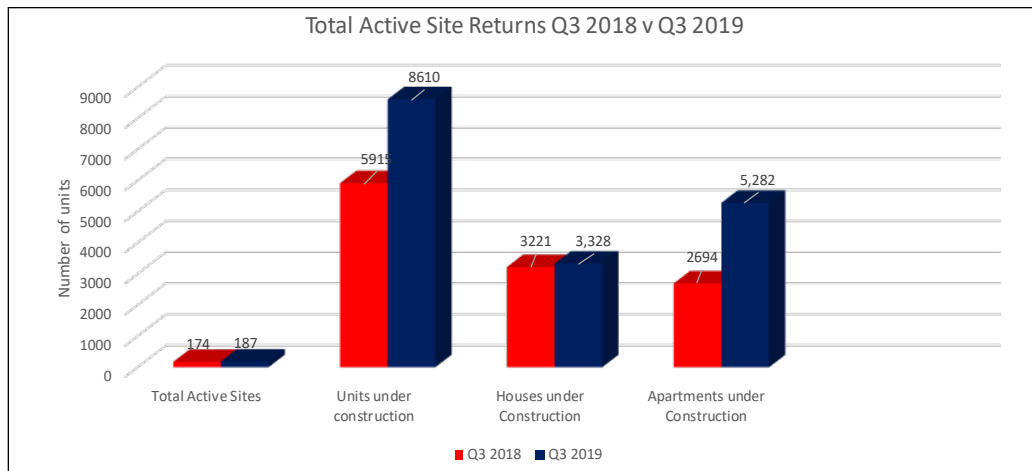


Table C: Active Sites Annual Comparative Analysis

Planning Applications

In relation to planning applications awaiting decisions, there was a 55% increase in the overall number of Tier 2A residential units from 6,950 in Q3 2018 to 10,797 in Q3 2019. The total number of houses recorded in the Tier 2A return increased by 28% (i.e. 1,772 in Q3 2018 to 2,275 in Q3 2019), while the total number of apartments recorded in Tier 2A increased by 65% (i.e. 5,178 in Q3 2018 to 8,522 in Q3 2019) for the same period. This further indicates that the evident shift towards higher density apartment developments is likely to continue; the ratio of houses to apartments in Tier 2A, for which planning permission is currently being sought, stands at almost 1:4 across the four Dublin local authorities (2,275 houses and 8,522 apartments, respectively).

1. Introduction

The Quarter 3 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 at Section 6.

2. Returns Tables

Table 1: Each Local Authority’s Cumulative Totals for Tiers 1 and 2A

	Tier 1		Tier 2A		Totals
	Tier 1 Totals		Tier 2A Totals		
	Houses	Apartments	Houses	Apartments	
DCC	1,463	11,861	18	4,861	18,203
DLRCC	2,731	11,372	185	1,475	15,763
SDCC	3,818	2,598	1,487	1,586	9,489
FCC	9,150	6,473	585	600	16,808
Total	17,162	32,304	2,275	8,522	60,263

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	1,463	11,861	323	223	293	2,154	847	9,484
DLRCC	2,731	11,372	949	1,503	493	1,304	1,288	8,566
SDCC	3,818	2,598	1,657	44	956	920	1,205	1,634
FCC	9,150	6,473	3,936	913	1,586	904	3,628	4,656
Total	17,162	32,304	6,865	2,683	3,328	5,282	6,968	24,340

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	2,598	0	454	2,144
DLRCC	4,337	0	60	4,277
SDCC	1,421	89	425	907
FCC	150	13	125	12
Total	8,506	102	1,064	7,340

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	18	4,861
DLRCC	185	1,475
SDCC	1,487	1,586
FCC	585	600
Total	2,275	8,522

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	18,997	6,085	0
DLRCC	33,600	979	9,609	4,400
SDCC	37,684	10,619	0	0
FCC	49,541	15,551	13,578	19,980
Total	173,425	46,146	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: Tier 2C 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	0	0		
DLRCC	149	38	142	100	101	65		
SDCC	810	18	269	100	11	37		
FCC	187	41	495	68	220	55		
Total	1,146	97	923	718	332	157		

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

Q3 2019 compared with Q3 2018:

- 15% increase on the number of sites with planning permission from 134 sites to 154 sites.
- 8% increase in the total number of units with planning permission from 12,298 to 13,324.
- 18% increase in active sites from 28 sites to 33 sites.
- 107% increase in the number of units under construction from 1,185 to 2,447.

Quarterly Highlights

- There was a **57% increase in the number of active sites** this quarter rising from 21 active sites in Q2 2019 to 33 active sites in Q3 2019.
- There were **2,323 residential units granted** planning permission this quarter under 17 no. separate planning applications.
- A further **19 no. planning applications are pending** decisions that have the potential to provide **3,286 no. residential units** in the city.

Strategic Housing Developments (SHD)

- 4 No. **SHD applications** were granted permission by An Bord Pleanála this quarter that would provide a total of **1,272 no. Build to Rent apartments**. These are located at: 1) Chivers, Coolock Drive, Dublin 17 under ABP case no. 304346. 2) Clare Hall, Malahide Road, Dublin 17 under ABP case No. 304196. 3) Concorde Industrial Estate, Naas Road, Walkinstown, Dublin 12 under ABP no. 304383. 4) lands immediately east of the Assumption National School, Long Mile Road, Walkinstown, Dublin 12 under ABP No. 304686.
- There were no **SHD applications** for student accommodation granted permission by An Bord Pleanála within this quarter.
- There are **6 no. SHD applications** awaiting decisions of An Bord Pleanála that would potentially provide a cumulative total of **1,326 no. residential units**.



Total No. of Sites with Planning Permission

15% increase
from 134 to 154



Total No. of Units with Planning Permission

8% increase
from 12,298 to 13,324



Total No. of Active Sites

18% increase
from 28 to 33



Total No. of Units Under Construction

107% decrease
from 1,185 to 2,447

3.2 Dun Laoghaire Rathdown County Council

Year on Year comparison

Q3 2019 compared with Q3 2018:

- **22% increase in the number of sites with planning permission** from 101 sites to 123 sites.
- **30% increase in the total number of units with planning permission** from 10,814 to 14,103.
- **2% decrease in the number of active sites** from 44 sites to 43 sites.
- **35% increase in the number of units under construction** from 1,332 to 1,797.
- **23% increase in the number of completions** in this quarter from 304 to 374.

Quarterly Highlights

- **10% increase** in the **total number of residential units with planning permission** this quarter at 14,103 from 12,878 in previous quarter.
- There were **5 no. development sites fully completed** and moved to Tier 2C this quarter comprising of a total of **166 no. residential units** (101 no. houses and 65 no. apartments).
- The sum total of units with planning permission this quarter is running at approximately **1:4 houses:apartments**. Units in the planning system awaiting final determination this quarter are running at nearly **1:8 houses:apartments**.

Strategic Housing Developments (SHD)

- **Planning permission granted** by An Bord Pleanála for: (1) **192 no. apartments units** at Clay Farm, Ballyogan Road, Dublin 18; (2) **132 no. units (113 no. apartments and 19 no. houses)** at Our lady's grove, Goatstown Road, Goatstown, Dublin 14; (3) **428 no. apartments at Rockbrook**, Carmanhall Road, Sandyford Business District, Sandyford, Dublin 18; (4) **116 no. apartments** at walled Garden, Gort Mhuire, Dundrum, Dublin 14; (5) **253 no. apartments** at Greenacres, Longacre and Drumahill House, Upper Kilmacud Road, Dundrum, Dublin 14 and (6) **210 no. apartments** at Churchview Road and Church Road.
- **Planning permission was granted** by An Bord Pleanála for **208 no. Build-to-Rent Shared Living Residential units** at Old School House, Eblana avenue, Dun Laoghaire.
- **SHD Applications lodged** with An Bord Pleanála for: 1. **232 no. Build-to-Rent apartments** at Stillorgan Leisureplex, Old Dublin Road, Stillorgan, Co. Dublin; 2. **107 no. apartments** at Building 5, Dundrum Town Centre, Sandyford Road, Dublin 18 and 3. **287 no. Build-to-Rent apartments** at Lands Adjacent to 'The Grange', Stillorgan, Co. Dublin.
- Combined total of residential units in **SHDs in Tiers 1 and 2A** currently stands at 5,013 no.units of which houses account for only 623 no. (12%).



Total No. of Sites with Planning Permission
22% increase
from 101 to 123



Total No. of Units with Planning Permission
30% increase
from 10,814 to 14,103



Total No. of Active Sites
2% decrease
from 44 to 43



Total No. of Units Under Construction
35% increase
from 1,332 to 1,797

3.3 South Dublin County Council

Year on Year comparison

Q3 2019 compared with Q3 2018:

- 2% decrease in the **number of sites with planning permission** from 61 sites to 60 sites.
- 8% increase in the **total number of units with planning permission** from 5,928 to 6,416.
- 3% increase in the **number of active sites** from 29 sites to 30 sites.
- 65% increase in the **number of units under construction** from 1,138 to 1,876.
- 4% increase in the **number of units completed** in the 12-month period to end Q3 2019 (1,213 units) compared to the 12-month period to end Q3 2018 (1,161 units).

Quarter Highlights

- There were **2 no. development sites fully completed** and moved to Tier 2C this quarter comprising of a total of **48 no. residential units** (11 no. houses and 37 no. apartments).
- **23% increase** in the total **number of residential units under construction** this quarter at 1,876 from 1,529 in previous quarter, made up by an increase in apartment construction from 433 units to 920.
- **Adamstown SDZ** (LIHAF/MUHDS) continues to progress steadily overall in terms of construction activity. 621 no. units are currently under construction, slightly up from 604 no. units at end of Q2 2019.

Strategic Housing Developments (SHD)

- **Two SHD decisions** were issued by An Bord Pleanála this quarter: Permission **Refused** for **609 no. residential units (267 no. houses and 342 no. apartments)** in Boherboy, Saggart under ABP Ref No. 304828. Permission **Granted** for **196 no. units (all apartments)** at Second Avenue Cookstown Industrial Estate, Tallaght under ABP Ref No. 303803.
- **425 no. houses are currently under construction** on two SHD sites in Fortunestown, under ABP Ref Nos. 302398 and 300555.
- **8 no. SHD applications** were lodged with An Bord Pleanála (**i.e. at the third stage of the process**) during Q3, with potential for **3,633 units**.
- **5 no. SHD applications** were at the **second stage of the process** at pre-planning with An Bord Pleanála and SDCC during Q3 with potential for **2,319 units**.
- **20 no. SHD applications** were at the **first stage of the process** at pre-planning with SDCC during Q3 with potential for **5,684 no. units**.



Total No. of Sites with Planning Permission
2% decrease
from 61 to 60



Total No. of Units with Planning Permission
8% increase
from 5,928 to 6,416



Total No. of Active Sites
3% increase
from 29 to 30



Total No. of Units Under Construction
65% increase
from 1,138 to 1,876

3.4 Fingal County Council

Year on Year comparison

Q3 2019 compared with Q3 2018:

- 2.3% increase in the number of sites with planning permission from 131 sites to 134 sites.
- 10.6% decrease in the total number of units with planning permission from 17,482 to 15,623.
- 11% increase in the number of active sites from 73 sites to 81 sites.
- 10.2% increase in the number of units under construction from 2,260 to 2,490.
- 21.5% decrease in the number of units completed in the 12-month period to end Q3 2019 (1,539 units) compared to the 12-month period to end Q3 2018 (1,961 units),

Quarter Highlights

- There was **1 no. development site fully completed** and removed from Tier 1 and three new planning applications were added in Q3 2019. There is a slight increase in the number of active sites from 79 in Q2 2019 to 81 in Q3. The rate of activity remains steady in the 'Under Construction' category between Q2 2019 (2,604 units) and Q3 (2,490 units).
- **Hansfield SDZ** construction continues to progress. There is a consistent rate of construction activity in this quarter with 142 no. units under construction. The number of completions in this quarter is up slightly to 45 units from 41 no. units in the previous quarter. There are 10 no. active permissions on the SDZ lands. There is a total of 997 occupied/ Completed units to date on the overall SDZ lands.
- **Oldtown/Mooretown** (LIHAF/MUHDS). The rate of construction activity has increased with 200 no. units currently under construction compared to 150 no. units in the previous quarter, which is an increase of 33%. Six of the eight sites on these lands are now active. There are 4 Newly Occupied units in this quarter.
- **Donabate** (LIHAF/MUHDS) continues to progress. 263 No. units under construction in Q3 2019 compared to 276 no. units in Q2 2019. The rate of construction activity has increased within this quarter with an additional 82 no. units completed in this quarter compared to 39 no. units in Q2 2019.
- **Northwood-Santry** Construction continues to progress in three active sites. 311 no. units are under construction this quarter compared to 395 no. units in Q2 2019. However, the completion rate has increased significantly with 161 no. units Newly Occupied in Q3 2019 compared to 77 no. units in Q2 2019.



Total No. of Sites with Planning Permission
2.3% increase
from 131 to 134



Total No. of Units with Planning Permission
10.6% decrease
from 17,482 to 15,623



Total No. of Active Sites
11% increase
from 73 to 81



Total No. of Units Under Construction
10.2% increase
from 2,260 to 2,490

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.

