

Housing Supply Coordination Task Force For Dublin

Quarter 4 2017 Returns



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



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Executive Summary

The 2017 Quarter 4 Dublin Housing Taskforce returns indicate a 6% increase in the cumulative number of units within tier 1 and tier 2A respectively, when compared with the same period in 2016 (i.e. 44,431 in Q4 2016 vs 47,073 in Q4 2017). This change was affected by a positive year-on-year increase in tier 1 houses under construction, with a 47% increase recorded in house construction activity (i.e. 2,429 in Q4 2016 vs 3,570 in Q4 2017).

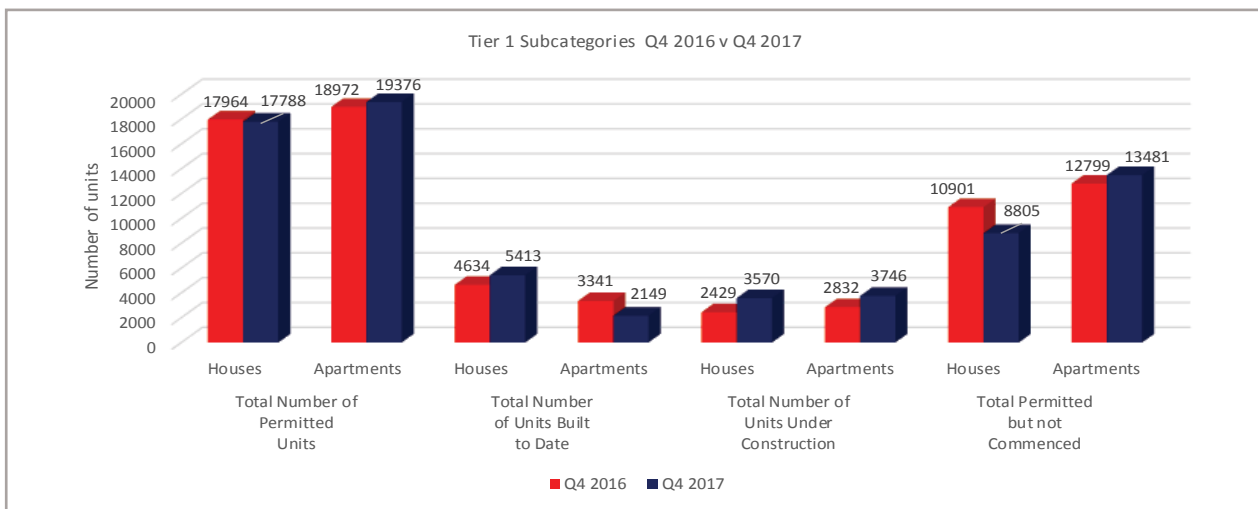


Table A: Tier 1 Subcategories Annual Comparative

In terms of construction activity, whilst the total number of residential units ‘built to date’ showed a decrease during the year (i.e. 7,975 in Q4 2016 compared with 7,562 in Q4 2017), the number of houses ‘built to date’ showed an increase of 779 residential dwellings when compared with the same period in 2016 i.e. (4,634 in Q4 2016 compared to 5,413 in Q4 2017). This is supported by a 39% increase in the ‘total number of units under construction’, from 5,261 in Q4 2016 to 7,316 in Q4 2017. In addition, there was a 47% increase in the total number of houses that were under construction, going from 2,429 units in Q4 2016 to 3,570 units in Q4 2017.

In reflecting on 2017 and looking at the total number of completions over the past 12 months, there has been a 135% increase in the output of housing supply, going from 1,646 residential dwelling completions for the entirety of 2016 compared to 3,864 for the full year in 2017. Within this, house completions have increased by 118% (i.e. 954 in 2016 compared with 2,079 in 2017) and apartment completions have increased by 158% (i.e. 692 in 2016 compared with 1,785 in 2017). Such statistics highlight a considerable level of growth in house construction activity within the Dublin region.

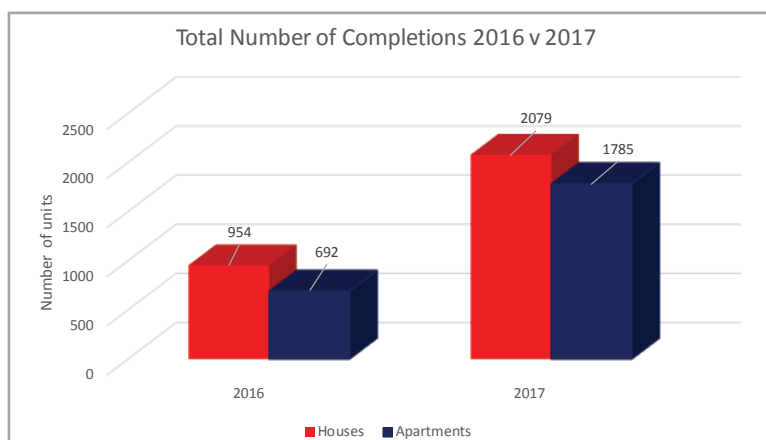


Table B: Residential Dwelling Completions Comparative

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 22,286 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. 8,805 in Q4 2017 vs. 10,901 in Q4 2016), which indicates a higher level of house construction activity in the past 12 months, which is further supported by an increase of 30 active construction sites (i.e. 174 in Q4 2017 vs. 144 in Q4 2016).

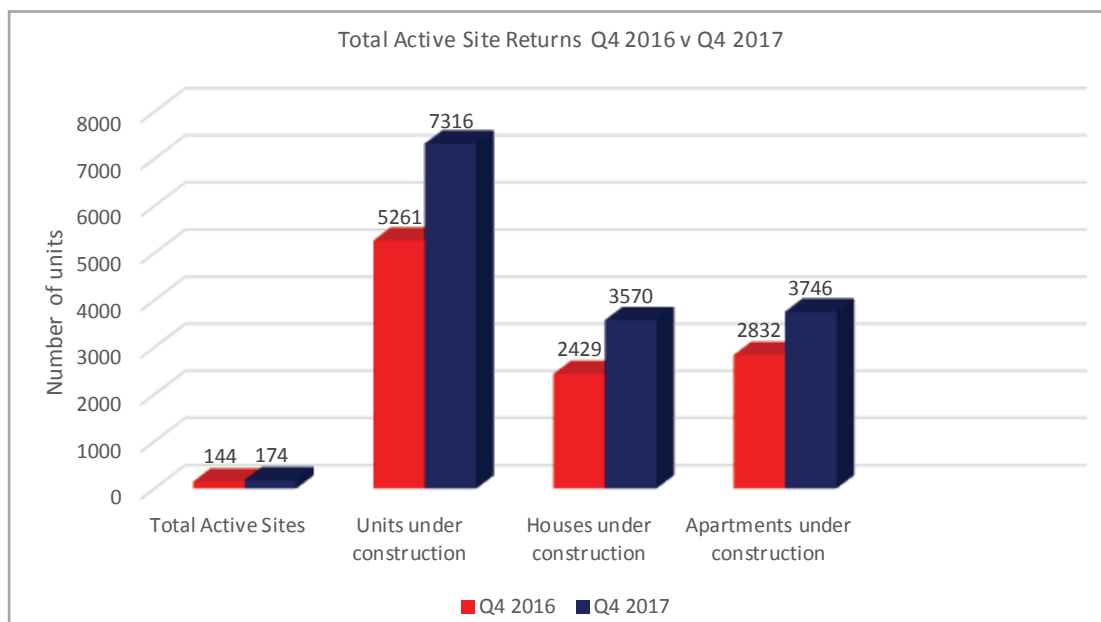


Table C: Active Sites Annual Comparative Analysis

Notably, there was a 32% increase in the overall tier 2A residential units from 7,495 in Q4 2016 to 9,909 in Q4 2017. The total number of houses recorded in the tier 2A return increased marginally by 1.5% (i.e. 3,291 in Q4 2017 vs. 3,241 in Q4 2016), while the total number of apartments recorded in tier 2A increased significantly by 56% (i.e. 6,618 in Q4 2017 vs. 4,254 in Q4 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 4 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	1,911	7,051	134	2,497	11,593
DLRCC	2,207	4,401	667	2,926	10,201
SDCC	3,719	834	1,003	397	5,953
FCC	9,951	7,090	1,487	798	19,326
Total	17,788	19,376	3,291	6,618	47,073

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	1,911	7,051	365	48	599	2,004	947	4,999
DLRCC	2,207	4,401	779	776	544	886	884	2,739
SDCC	3,719	834	1,109	14	968	115	1,642	705
FCC	9,951	7,090	3,160	1,311	1,459	741	5,332	5,038
Total	17,788	19,376	5,413	2,149	3,570	3,746	8,805	13,481

Table 3: Total Units in Houses & Apartments

	Tier 2A Subcategories	
	Total Number of Units	
	Houses	Apartments
DCC	134	2,497
DLRCC	667	2,926
SDCC	1,003	397
FCC	1,487	798
Total	3,291	6,618

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	7,025	6,085	0
DLRCC	33,600	7,149	9,609	4,400
SDCC	40,723	12,829	0	0
FCC	49,541	15,551	13,578	19,980
Total	176,464	42,554	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	44	0	300	0	16	15	61	14
DLRCC	14	510	45	0	19	17	14	65
SDCC	0	0	500	278	0	0	184	232
FCC	331	30	321	277	230	347	0	0
Total	389	540	1166	555	265	379	259	311

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 Housing Supply Coordination Taskforce Q4 2018

Year on Year comparison

Q4 2017 compared with Q4 2016:

- 15.8% increase on the **number of sites** with planning permission from 107 sites to 124 sites.
- 22.8% increase in the **total number of units** with planning permission from 7,296 to 8,962 units.
- 39.2% increase in **active sites** from 28 sites to 39 sites.
- 220% increase in the number of **units under construction** from 1,184 to 2,603.



Total No. of Sites with Planning Permission

15.8% increase from 107 to 124



Total No. of Units with Planning Permission

22.8% increase from 7,296 to 8,962



Total No. of Active Sites

39.2% increase from 28 to 39



Total No. of Units Under Construction

220% increase from 1,184 to 2,603

3.2 Dun Laoghaire Rathdown Housing Supply Coordination Taskforce Q3 2017

Year on Year comparison

Q4 2017 compared with Q4 2016:

- 4% increase in the **number of sites** with planning permission from 76 sites to 79 sites.
- 1% decrease in the total **number of units** with planning permission from 6,659 to 6,608 units.
- **10%** decrease in **active sites** from 41 sites to 37 sites.
- **17%** decrease in the number of **units under construction** from 1,729 to 1,430.
- **17%** decrease in the number of **completions** in this quarter from 420 to 347.

Quarter Highlights

- This quarter sees 7 new sites enter Tier 1, which will supply 226 residential units (22 houses and 204 apartments).
- There is a 117% increase Year on Year (YoY) in the number of residential units in Tier 2A.
- There is a 22% decrease YoY in the number of completions this quarter. However, there has been a 143% increase in the number of completions in Q4 2017 from Q3 2017, going from 143 to 347.
- While the number of active sites has decreased by 10% this quarter YoY, four sites were completed this quarter, supplying a total of 272 units.
- Completions for this quarter are running at approximately 1:2 houses: apartments (103:244).



Total No. of Sites with Planning Permission

4% increase from 76 to 79



Total No. of Units with Planning Permission

1% decrease from 6,659 to 6,608



Total No. of Active Sites

10% decrease from 41 to 37



Total No. of Units Under Construction

17% decrease from 1,729 to 1,430

3.3 South Dublin County Council Housing Supply Coordination Taskforce Q2 2017

Year on Year comparison

Q4 2017 compared with Q4 2016:

- 416 units completed, compared to 0 units.
- **36%** increase in the **number of houses** built to date from 813 to 1,109.
- **8%** increase in **number of active sites** from 25 sites to 27 sites.
- **86%** increase in the **number of units under construction** from 581 to 1,083.
- **27%** decrease in the total number of **units with planning permission** from 6,226 to 4,553.

Quarter Highlights

- Planning application and Part 8 lodged for new Celbridge Link Road in Adamstown SDZ.
- 200 residential units constructed in Adamstown over the course of 2017, with 148 dwelling sales closed.
- Planning application lodged under Reg. Ref. SD17A/0397 at Cloverhill Road, Raheen for 85 dwellings.
- Planning application lodged under Reg. Ref. SD17A/0468 at Oldcourt for 64 dwellings.



Total No. of Sites with Planning Permission

0% increase from 51 to 51



Total No. of Units with Planning Permission

27% decrease from 6,226 to 4,553



Total No. of Active Sites

8% increase from 25 to 27



Total No. of Units Under Construction

86% increase from 581 to 1,083

3.4 Fingal County Council Housing Supply Coordination Taskforce Q2 2017

Year on Year comparison

Q3 2017 compared with Q3 2016:

- 3% increase in the **number of sites** with planning permission in Tier 1 from 114 to 118.
- 1.7% increase in the **number of units** with planning permission from 16,755 to 17,041.
- 39% increase in **active sites** from 51 to 71 sites.
- 24.5% increase in the number of **units under construction** from 1,767 to 2,200 units.
- 34% increase in the number of units **completed and occupied** in 12 month period to end of Q4 2017 (1,378 units) compared to the 12 months to end of Q4 2016 (1,026 units).

Quarter Highlights

- Hansfield SDZ continues to progress well, with 89 units completed and 292 units under construction in Q4. The rate of construction activity has accelerated in Q4, up from 119 units under construction in Q3. The rate of completions are on a par with the previous Q3, where 90 units were completed.
- Oldtown/Mooretown (MUHDS) lands continue to progress with 20 units completed in Q4 and 121 units under construction. These lands have seen a significant rise in planning permissions sought in Q4. Specifically, Reg. Ref. F17A/0666: Permission was sought for 42 houses and 54 apartments – Oldtown lands, Reg. Ref. F17A/0677: Permission was sought for 98 houses – Oldtown lands and Reg. Ref. F17A/0687: Permission was sought for 92 houses – Oldtown lands (LIHAF Sites). Decisions pending.
- Donabate (MUHDS) has 156 units under construction during Q4, up from 119 in Q3. A decision to Grant Permission under Reg. Ref. F17A/0113 (LIHAF Site) was issued by FCC in Q4 for the construction of 196 houses and 62 apartments. Final Grant of Permission issued by FCC Q1. 2018.
- Phoenix Park Racecourse development F02A/1255/E1 - construction activity continues at a consistent pace in Q4, with 64 units under construction.
- 6.7% decrease in ‘under construction’ activity between Q3 (2,348 units) and Q4 (2,200 units). This decrease during Q4 is however off-set by the high rate of completed developments in Q2 and Q3 2017 and by the number of units completed in Q4 (481 units).
- 12 more Active Sites in Q4 (*This fig. includes 3 former dormant sites that have now become active in Q4).



Total No. of Sites with Planning Permission

3% increase from 114 to 118



Total No. of Units with Planning Permission

1.7% increase from 16,755 to 17,041



Total No. of Active Sites

39% increase from 51 to 71



Total No. of Units Under Construction

44% increase from 1,767 to 2,200

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.**

