

# Housing Supply Coordination Task Force For Dublin

*Quarter 4 2018 Returns*



*February 2019*



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



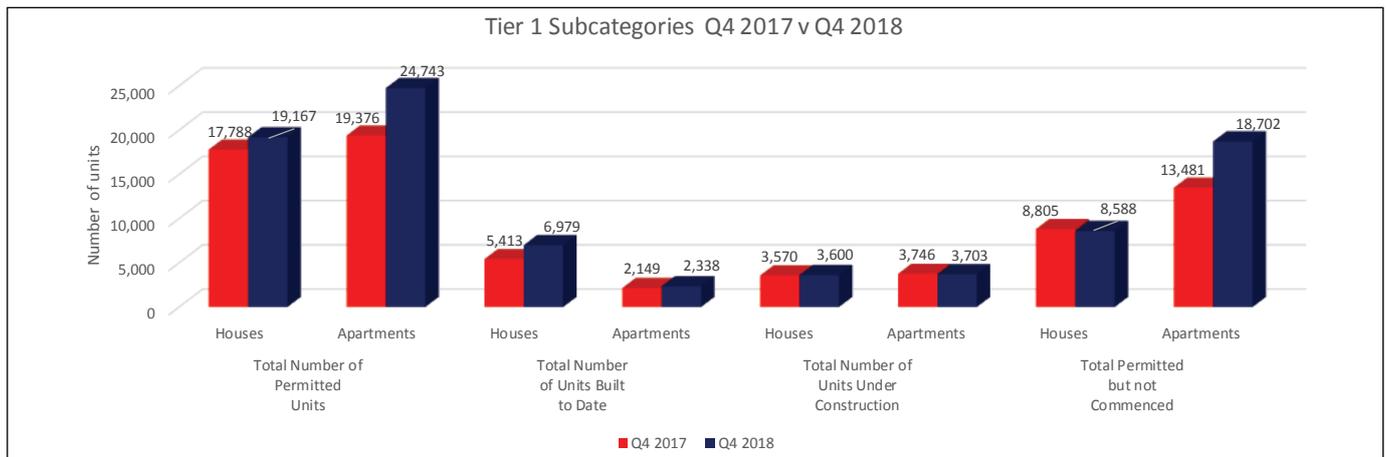


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## Executive Summary

The 2018 Quarter 4 Dublin Housing Taskforce returns indicate a 12% increase in the cumulative number of units within Tier 1 and Tier 2A respectively, when compared with the same period in 2017 (i.e. 47,073 in Q4 2017 vs 52,599 in Q4 2018).

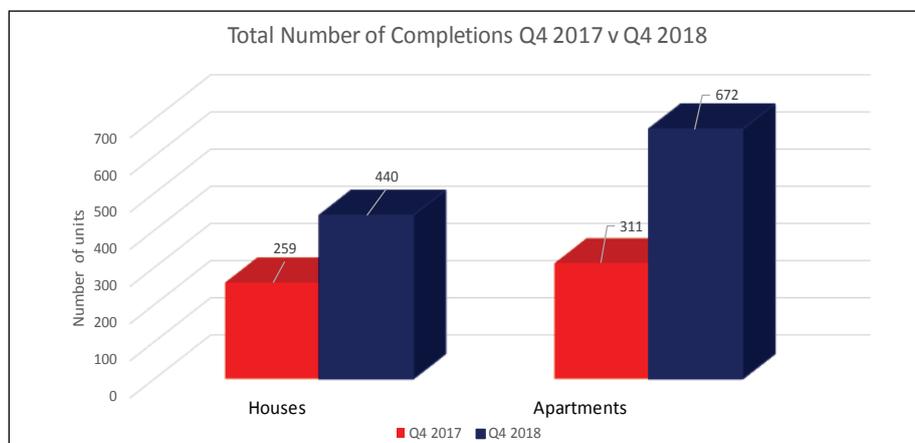


**Table A: Tier 1 Subcategories Annual Comparative Analysis**

In the analysis of construction activity, overall ongoing activity across development sites in the Dublin Region, reflected in the cumulative number of ‘units built to date’ and ‘units under construction’, is up 12% from 14,878 units in Q4 2017 to 16,620 units in Q4 2018.

The total number of residential units ‘built to date’ showed an increase of 23% during the year (i.e. 7,562 in Q4 2017 compared with 9,317 in Q4 2018). The number of houses ‘built to date’ showed an increase of 1,566 (29%) while the number of apartments ‘built to date’ showed an increase of 189 (9%). There was a slight decrease in the ‘total number of units under construction’ this quarter in a year on year comparison i.e. from 7,316 in Q4 2017 to 7,303 in Q4 2018. However, in the context of overall increased construction activity, this may be explained by the increase in completions earlier in 2018 in comparison to the previous year, which is further reflected in a higher rate of fully completed development sites taken out of the Tier 1 figures, comprising of 1,336 units (738 houses and 598 apartments) in Q3 2018 and 1,112 units (440 houses and 672 apartments) in Q4 2018. Favourable weather conditions and a general increase in site activity may have contributed to this.

Development sites which were fully completed this quarter comprised of 1,112 residential units (440 houses and 672 apartments), with the most significant number of completions occurring in the Fingal County Council administrative area. In a year on year comparison, 570 residential units were completed in Q4 2017, which represented a 95% increase (or 542 units) in year on year comparison.



**Table B: Residential Dwelling Completions Comparative Analysis**

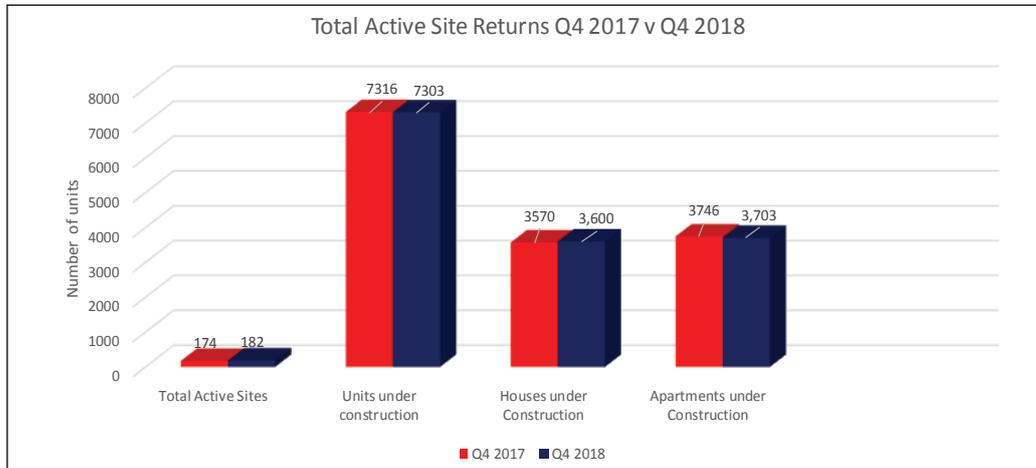
With regard to extant planning permissions which have yet to commence construction, the outlook is especially positive from a housing supply capacity perspective. Planning permission remains in place in the Dublin Region for the development of a combined total of 27,290 residential units in Q4 2018, up from 22,286 in Q4 2017, which represents a 22% increase.

While a significant quantum of housing units await the commencement of construction, there has been a marginal decrease (2%) in the ‘total permitted but not commenced’ number of houses (i.e. 8,805 in Q4 2017 vs. 8,588 in Q4 2018). However, there has been a significant increase (39%) in the number of apartment units permitted but not commenced i.e. 13,481 units in Q4 2017 to 18,702 units in Q4 2018. This change in housing typology is a significant departure from the trends of recent times where planning permission for houses were predominately sought, with an apparent shift towards higher density apartment developments now emerging.

With regards to the number of active sites in the Dublin region, on a year on year comparison, the number of sites has increased by 5% from 174 sites in Q4 2017 vs. 182 sites in Q4 2018.

The number of units in development sites which were fully completed in Q4 2018 stands at 1,112 units, while a reduction compared to Q3 2018 (1,336 units), represents the first time that fully completed development sites comprising of more than 1,000 units have been recorded for two consecutive quarters, since the recording of construction activity as part of the Dublin Housing Taskforce.

This increase in fully completed development sites represents a positive trend and may be an indicator for increased construction activity through 2019, taking into consideration the increase in units with planning permission (i.e. 27,290 units in Q4 2018 vs 22,286 units in Q4 2017).



**Table C: Active Sites Annual Comparative Analysis**

In relation to planning applications awaiting decisions, there was a 12% decrease in the overall number of Tier 2A residential units from 9,909 in Q4 2017 to 8,689 in Q4 2018. This represents an increase of 25% compared to Q3 2018 (6,950 units). The total number of houses recorded in the Tier 2A return decreased by 48% (i.e. 3,291 in Q4 2017 vs. 1,712 in Q4 2018), while the total number of apartments recorded in Tier 2A increased by 5% (i.e. 6,618 in Q4 2017 vs. 6,977 in Q4 2018) for the same period. This further supports the idea of a change in housing typology with an apparent shift towards higher density apartment developments now emerging. The adoption of Ministerial Apartment Guidelines (March) and building height guidelines (December) in 2018 may have influenced the timing of commitments to apartment developments with a high number currently going through the planning process or recently permitted but not commenced. It is anticipated that this will be reflected in apartment construction activity in 2019.



## 1. Introduction

The Quarter 4 2018 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	
<b>DCC</b>	1,510	9,556	143	2,064	<b>13,273</b>
<b>DLRCC</b>	2,798	8,240	341	1,943	<b>13,322</b>
<b>SDCC</b>	5,012	1,830	869	918	<b>8,629</b>
<b>FCC</b>	9,847	5,117	359	2,052	<b>17,375</b>
<b>Total</b>	<b>19,167</b>	<b>24,743</b>	<b>1,712</b>	<b>6,977</b>	<b>52,599</b>

**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
<b>DCC</b>	1,510	9,556	248	308	350	1,611	912	7,637
<b>DLRCC</b>	2,798	8,240	986	1,146	484	977	1,328	6,117
<b>SDCC</b>	5,012	1,830	1,877	26	1,152	202	1,983	1,602
<b>FCC</b>	9,847	5,117	3,868	858	1,614	913	4,365	3,346
<b>Total</b>	<b>19,167</b>	<b>24,743</b>	<b>6,979</b>	<b>2,338</b>	<b>3,600</b>	<b>3,703</b>	<b>8,588</b>	<b>18,702</b>

**Table 3: Total Units in Houses & Apartments**

	Tier 2A Subcategories	
	Total Number of Units	
	Houses	Apartments
<b>DCC</b>	143	2,064
<b>DLRCC</b>	341	1,943
<b>SDCC</b>	869	918
<b>FCC</b>	359	2,052
<b>Total</b>	<b>1,712</b>	<b>6,977</b>

**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
<b>DCC</b>	52,600	17,178	6,085	0
<b>DLRCC</b>	33,600	3,073	9,609	4,400
<b>SDCC</b>	38,583	11,518	0	0
<b>FCC</b>	49,541	15,551	13,578	19,980
<b>Total</b>	<b>174, 234</b>	<b>47,320</b>	<b>29,272</b>	<b>24,380</b>

**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
<b>DCC</b>	12	0	0	0	306	316	135	68
<b>DLRCC</b>	13	0	18	14	0	0	17	2
<b>SDCC</b>	72	65	82	0	134	0	16	0
<b>FCC</b>	86	0	27	8	298	282	272	602
<b>Total</b>	<b>183</b>	<b>65</b>	<b>127</b>	<b>22</b>	<b>738</b>	<b>598</b>	<b>440</b>	<b>672</b>

**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

##### Q4 2018 compared with Q4 2017:

- 11% increase on the **number of sites with planning permission** from 124 sites to 138 sites.
- 24% increase in the **total number of units with planning permission** from 8,962 units to 11,090 units.
- 36% decrease in **active sites** from 39 sites to 25 sites.
- 25% decrease in the **number of units under construction** from 2,603 to 1,961.

##### Quarterly Highlights

- There were planning permissions **granted** for **1,096 units** this quarter under 16 separate planning applications.
- A further **15 applications are pending** decisions that have the potential to provide **906 residential units** in the city.

##### Strategic Housing Developments (SHD)

- There are **2 no. SHD applications** with An Bord Pleanála that would provide a total of **492 residential units**, located at Rathgar, Dublin 6 and Marino, Dublin 9 under ABP case 303133 and ABP case no. 303296 respectively.
- There is **1 no. SHD application** for student accommodation with An Bord Pleanála that would provide **261 no. student accommodation bed spaces** at Nolan Seafoods Ltd, Rathdown Road, Dublin 7 under ABP no. 302164.
- In addition to the above, there are a further **8 no. SHD applications** between DCC and An Bord Pleanála under consideration.



**Total No. of Sites with Planning Permission**

11% increase  
from 124 to 138



**Total No. of Units with Planning Permission**

24% increase  
from 8,962 to 11,090



**Total No. of Active Sites**

36% decrease  
from 39 to 25



**Total No. of Units Under Construction**

25% decrease  
from 2,603 to 1,256

### 3.2 Dun Laoghaire Rathdown County Council

#### Year on Year comparison

##### Q4 2018 compared with Q4 2017:

- 28% increase in the number of sites with planning permission from 79 sites to 101 sites.
- 67% increase in the total number of units with planning permission from 6,608 to 11,038.
- 24% increase in active sites from 37 sites to 46 sites.
- 2% increase in the number of units under construction from 1,430 to 1,461.
- 20% decrease in the number of completions in this quarter from 347 to 276.

#### Quarter Highlights

- **Planning permission granted** by DLR for 80 units (21 houses + 59 apartments) under Phase 2 of the residential development at Knockrabo in Goatstown.
- **Planning application** lodged for mixed-use scheme at The Park, Carrickmines which includes 130 apartments.
- **Planning application** lodged for a Build to Rent scheme comprising of 68 apartments at site located at the junction of Fleurville Road and Newtownpark Avenue in Blackrock.
- **2 no. applications were granted** on appeal by An Bord Pleanála this quarter totalling 99 apartment units. The average number of weeks these applications were with the Board is 22 weeks.
- The sum total of units with planning permission this quarter is running at approximately 1:2 **houses:apartments**. Units in the planning system awaiting final determination this quarter are running 1:5 houses:apartments.

#### Strategic Housing Developments (SHD)

- Planning permission **granted** by An Bord Pleanála for **341 units** (98 houses + 243 apartments) at Glencairn House Lands, Murphystown Way in Leopardstown.
- An **SHD application for 221 units** (7 houses + 214 apartments) at Chesterfield on Cross Avenue in Blackrock was lodged with An Bord Pleanála.
- Planning permission was **refused** by An Bord Pleanála for a SHD application for 250 apartment units at Golf Lane in Carrickmines. The reasons for refusal cited insufficient height.
- By the end of this quarter, there were a total of **31no. sites** at preplanning Stage 1 and Stage 2 of the **Strategic Housing Development** planning process within DLR with the potential to provide circa 6,381 residential units.



**Total No. of Sites with Planning Permission**  
28% increase  
from 79 to 101



**Total No. of Units with Planning Permission**  
67% increase  
from 6,608 to 11,038



**Total No. of Active Sites**  
24% increase  
from 37 to 46



**Total No. of Units Under Construction**  
2% increase  
from 1,430 to 1,461

### 3.3 South Dublin County Council

#### Year on Year comparison

##### Q4 2018 compared with Q4 2017:

- 27% increase in the **number of sites with planning permission** from 51 sites to 65 sites.
- 50% increase in the **total number of units with planning permission** from 4,553 to 6,842.
- 19% increase in the **number of active sites** from 27 sites to 32 sites.
- 25% increase in the **number of units under construction** from 1,083 to 1,354.
- 45% increase in the **number of units completed** in the 12 month period to end Q4 2018 (1,149no. units) compared to the 12 month period to end Q4 2017 (792no. units).

#### Quarter Highlights

- **3,257 dwelling units built to date or under construction** in Q4 2018 reflecting a general trend in increased activity, up from 2,887 units in previous Q3, 2,403 units in Q2, 2,167 units in Q1 and 2,206 units in Q4 2017
- **15% increase in the total number of units with planning permission** this quarter at 6,842 dwelling units from 5,928 dwelling units in previous quarter.
- Planning application **lodged** under SD18A/0413 at Rathcoole for **93 dwelling units**.
- Planning permission **granted** under SD17A/0356 for **75 dwelling units** in Rathcoole following appeal.
- **Adamstown SDZ** (LIHAF/MUHDS) continues to progress steadily overall in terms of construction activity. The rate of construction has increased with 510 units under construction this quarter, as opposed to 453 units in Q3 2018. The rate of completions of residential units decreased this quarter with 59 units completed, compared to 227 units in Q3 2018.
- Planning permission **granted** under SDZ18A/0011 in Adamstown SDZ for 343 dwelling units.

#### Strategic Housing Developments (SHD)

- Permission **granted** by An Bord Pleanála for a SHD of **459 dwelling units** in Fortunestown.
- A SHD application **lodged** with An Bord Pleanála for **438 dwelling units** (all apartments) in Tallaght
- 8no. SHD applications are currently at Stage 1 of **pre-planning** with An Bord Pleanála and South Dublin County Council with potential for **3,050 dwelling units**.
- 12no. SHD applications are currently at **preliminary stage** of pre-planning with South Dublin County Council with potential for **4,837 dwelling units**.



**Total No. of Sites with Planning Permission**

27% increase  
from 51 to 65



**Total No. of Units with Planning Permission**

50% increase  
from 4,553 to 6,842



**Total No. of Active Sites**

19% increase  
from 27 to 32



**Total No. of Units Under Construction**

25% increase  
from 1,083 to 1,354

### 3.4 Fingal County Council

#### Year on Year comparison

##### Q4 2018 compared with Q4 2017:

- 14% increase in the number of sites with planning permission from 118 sites to 134 sites.
- 12% decrease in the total number of units with planning permission from 17,041 to 14,964\*.
- 11% increase in the number of active sites from 71 sites to 79 sites.
- 15% increase in the number of units under construction from 2,200 to 2,527.
- 33% increase in the number of units completed in the 12 month period to end Q4 2018 (1,830no. units) compared to the 12 month period to end Q4 2017 (1,378no. units).

*\*This reduction is due to six sites that have expired permissions totalling 2,104 Units and sixteen sites that have been fully completed totalling 1,575 Units*

#### Quarter Highlights

- The total number of **units in fully completed developments** is up to 874 units this quarter from 580 units in Q3 2018.
- **Hansfield SDZ** construction continues to progress. There is a consistent rate of construction activity in this quarter with 175 units under construction. Rate of completions in this quarter is slower, with 51 units completed, down from 137 units in the previous quarter. There are 6no. active permissions. There is a total of 858 completions to date. Permission was granted for 213 units under FW17A/0234. There are currently 3no. applications under consideration (c.900 Units).
- **Oldtown/Mooretown** (LIHAF/MUHDS) lands continue to progress with a higher rate of completions, with 34 units completed in this quarter compared to 6 units in the previous quarter. However, the rate of construction activity has decreased, with 94 units under construction compared to 108 units in the previous quarter. Permission was granted for a further 187 units under Planning Refs F17A/0687 (92 houses) and F17A/0666 (41 houses and 54 Apartments).
- **Donabate** (LIHAF/MUHDS) continues to progress however at a slower rate of completions in this quarter, 49 units completed, down from 63 units in the previous quarter. The rate of construction activity, however, has increased slightly in this quarter with 186 units under construction, up from 175 units in the previous quarter.



**Total No. of Sites with Planning Permission**  
14% increase  
from 118 to 134



**Total No. of Units with Planning Permission**  
12% decrease  
from 17,041 to 14,964



**Total No. of Active Sites**  
11% increase  
from 71 to 79



**Total No. of Units Under Construction**  
15% increase  
from 2,200 to 2,527



# 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.



