

# Housing Supply Coordination Task Force For Dublin

## Quarter 3 2018 Returns



*November 2018*



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



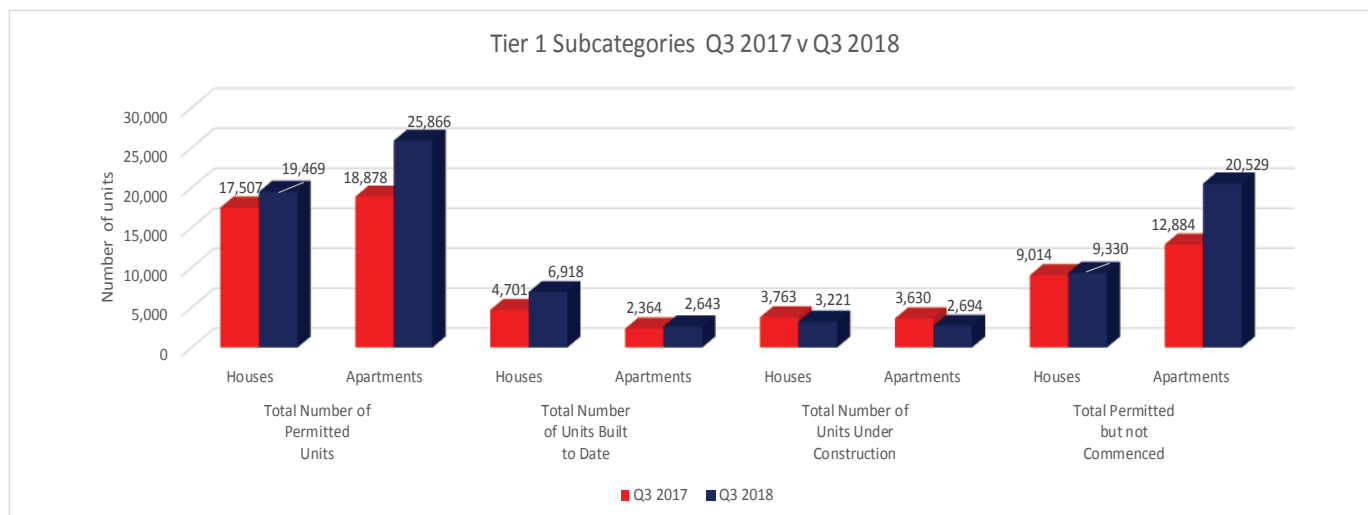


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## Executive Summary

The 2018 Quarter 3 Dublin Housing Taskforce returns indicate a 11% increase in the cumulative number of units within Tier 1 and Tier 2A respectively, when compared with the same period in 2017 (i.e. 47,108 in Q3 2017 vs 52,274 in Q3 2018).

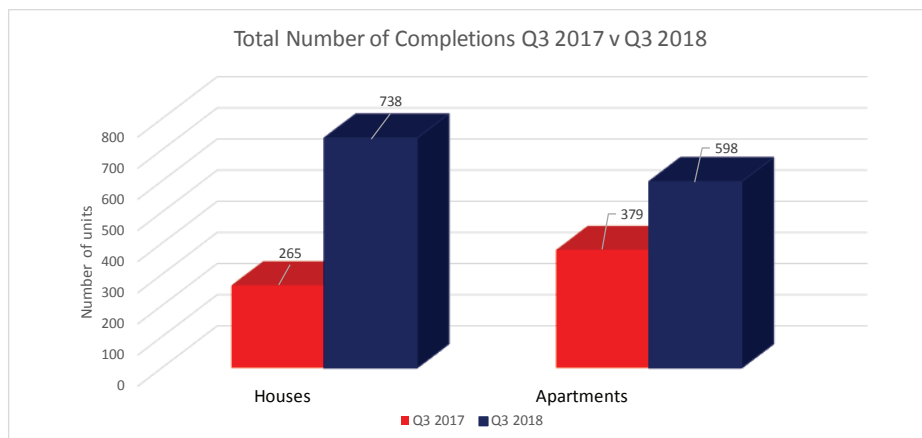


**Table A: Tier 1 Subcategories Annual Comparative**

In the analysis of construction activity, the total number of residential units ‘built to date’ showed an increase of 35% during the year (i.e. 7,065 in Q3 2017 compared with 9,561 in Q3 2018). The number of houses ‘built to date’ showed an increase of 2,217 (47%) when compared with the same period in 2017 (4,701 in Q3 2017 compared to 6,918 in Q3 2018).

It is noted that there was a 20% decrease in the ‘total number of units under construction’ this quarter in a year on year comparison i.e. from 7,393 in Q3 2017 to 5,915 in Q3 2018. However, in the context of overall construction activity, this decrease in housing under construction is offset by the significant increase in housing completions this quarter.

A total of 1,336 residential units were completed this quarter, an increase of 1,187 units from Q2 2018, with the most significant number of completions occurring in the Dublin City Council administrative area. In a year on year comparison, 644 residential units were completed in Q3 2017, which represented a 107% increase (or 692 additional units) in this quarter.



**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 29,859 residential units (Q3 in 2018), up from 21,898 (Q3 in 2017) residential units, which represents a 36% increase.

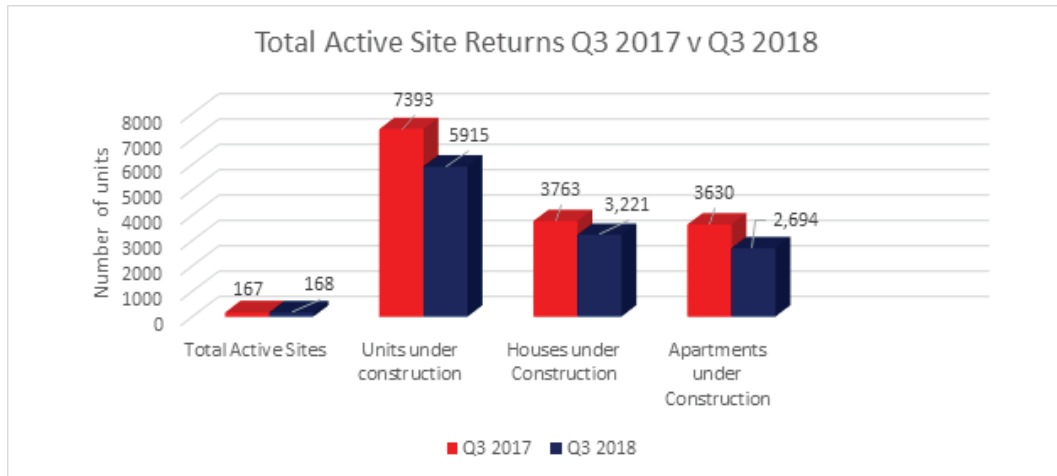
While a significant quantum of housing units await the commencement of construction, there has been a marginal increase (4%) in the 'total permitted but not commenced' number of houses (i.e. 9,014 in Q3 2017 vs. 9,330 in Q3 2018).

However, there has been a significant increase (59%) in the number of apartment units permitted but not commenced i.e. 12,884 units in Q3 2017 to 20,529 units in Q3 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 remain steady i.e. 167 sites in Q3 2017 vs. 168 sites in Q3 2018.

However when compared on a quarterly basis, Q3 2018 has seen the largest number of sites completed between quarters since Q3 2017 e.g. completion of 10 sites between Q2 and Q3 2018 compared to the completion of 5 sites between Q1 and Q2 2018 or the completion of 1 site between Q1 2018 and Q4 2017 and the completion of 7 sites between Q3 2017 to Q4 2017.

This increase in sites completed represents both a seasonal construction trend for the time of year, as well as forecasting increased construction activity through 2019, taking into consideration the increase in units with planning permission (i.e. 29,859 units in Q3 2018 vs 21,898 units in Q3 2017).



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

Notably, there was a 35% decrease in the overall number of Tier 2A residential units from 10,752 in Q3 2017 to 6,950 in Q3 2018. The total number of houses recorded in the Tier 2A return decreased by 46% (i.e. 3,288 in Q3 2017 vs. 1,772 in Q3 2018), while the total number of apartments recorded in Tier 2A decreased by 30% (i.e. 7,464 in Q3 2017 vs. 5,178 in Q3 2018) in the same period. This reduction is seen to be a knock on effect from the number of completions this quarter alongside the overall increase in number of units within Tier 1.





## 1. Introduction

The Quarter 3 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>	1,711	9,400	73	1,114	<b>12,298</b>
<b>DLRCC</b>	2,843	7,971	407	1,827	<b>13,048</b>
<b>SDCC</b>	4,604	1,324	288	432	<b>6,648</b>
<b>FCC</b>	10,311	7,171	1,004	1,805	<b>20,291</b>
<b>Total</b>	<b>19,469</b>	<b>25,866</b>	<b>1,772</b>	<b>5,178</b>	<b>52,285</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>	1,711	9,400	325	93	155	1,030	1,231	8,277
<b>DLRCC</b>	2,843	7,971	1,039	1,105	388	944	1,416	5,922
<b>SDCC</b>	4,604	1,324	1,729	20	1,014	124	1,861	1,180
<b>FCC</b>	10,311	7,171	3,825	1,425	1,664	596	4,822	5,150
<b>Total</b>	<b>19,469</b>	<b>25,866</b>	<b>6,918</b>	<b>2,643</b>	<b>3,221</b>	<b>2,694</b>	<b>9,330</b>	<b>20,529</b>

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

	Tier 2A Subcategories	
	Total Number of Units	
	Houses	Apartments
<b>DCC</b>	73	1,114
<b>DLRCC</b>	407	1,827
<b>SDCC</b>	288	432
<b>FCC</b>	1,004	1,805
<b>Total</b>	<b>1,772</b>	<b>5,178</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	16,328	6,085	0
<b>DLRCC</b>	33,600	3,623	9,609	4,400
<b>SDCC</b>	40,723	11,551	0	0
<b>FCC</b>	49,541	15,551	13,578	19,980
<b>Total</b>	<b>176,464</b>	<b>47,053</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		
<b>DLRCC</b>	13	0	18	14	0	0		
<b>SDCC</b>	72	65	82	0	134	0		
<b>FCC</b>	86	0	27	8	298	282		
<b>Total</b>	<b>183</b>	<b>65</b>	<b>127</b>	<b>22</b>	<b>738</b>	<b>598</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.

# Quarterly Highlight Reports

### 3. Quarterly Highlight Reports

#### 3.1 Dublin City Council

##### Year on Year comparison

##### Q3 2018 compared with Q3 2017:

- 13% increase on the **number of sites** with planning permission from 119 sites to 134 sites.
- 36% increase in the **total number of units with planning permission** from 8,172 units to 11,111 units.
- 30% decrease in **active sites** from 40 sites to 28 sites. (Note: The sharp decrease in active sites year on year is largely caused by the increase of completed sites as 12 sites were deemed completed this quarter comprising 622 no. units divided between 306 houses and 316 apartments.)
- 49% decrease in the number of **units under construction** from 2,325 to 1,185.

##### Quarterly Highlights

- There were planning permissions **granted** for 746 units this quarter under 11 separate planning applications.
- A further 18 applications are **pending decisions** that have the potential to provide 881 residential units in the City.

##### Strategic Housing Developments (SHD)

- There were two consultations for SHD with An Bord Pleánála during this quarter:
- The prospective applicant, Cairn Homes Properties Limited has proposed, inter alia, **354 no. residential units** (347 no. apartments and 7 no. houses) at Griffith Avenue, Marino, Dublin 9 under ABP no. 301680.
- The prospective applicant, NTM ROI Seed Capital LP has proposed, inter alia, **261 no. student accommodation bed spaces** at Nolan Seafoods Ltd, Rathdown Road, Dublin 7 under ABP no. 302164.
- There are **12 no. SHDs** applications being preliminary assessed by Dublin City Council during this quarter, amounting to 3368 potential units, one of which is applying for 948 units.



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

13% increase  
from 119 to 134



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

36% increase  
from 8,172 to 11,111



**Total No. of Active Sites**

30% decrease  
from 40 to 28



**Total No. of Units Under Construction**

49% decrease  
from 2,325 to 1,185

### 3.2 Dun Laoghaire Rathdown County Council

#### Year on Year comparison

##### Q3 2018 compared with Q3 2017:

- **26%** increase in the **number of sites with planning permission** from 80 sites to 101 sites.
- **59%** increase in the **total number of units with planning permission** from 6,800 to 10,814 units.
- **19%** increase in **active sites** from 37 sites to 44 sites.
- **15%** decrease in the **number of units under construction** from 1,570 to 1,332.
- **113%** increase in the **number of completions** in this quarter from 143 to 304.

#### Quarter Highlights

- Permission was **granted** by DLR for 240 units (80 houses + 160 apartments) at the Domville site in the Cherrywood SDZ.
- Six residential schemes on appeal were **granted by An Bord Pleanala (ABP)** this quarter providing a total of 237 units. The average number of weeks these appeals were with ABP is 35 weeks.
- There are **two SHD applications** awaiting final determination by ABP: Glencairn, Murphystown Way and Golf Lane, Carrickmines. These sites have the potential to deliver 591 units. (
- Also awaiting final determination is an application for 146 apartments in the **Cherrywood SDZ** and an application for 84 units at Beacon South Quarter in Sandyford Business District.
- This quarter sees a **113% year-on-year increase** in the number of completed units. 58% of the units completed this quarter were houses. 29% of all units currently under construction are houses. 19% of all units permitted but not commenced are houses.

#### Strategic Housing Developments (SHD)

- This quarter sees **4 no. SHD applications** granted by An Bord Pleanála (ABP) enter Tier 1: Clay Farm Phase 2, Ballyogan Road; Brennanstown Wood, Carrickmines; Kylemore, Church Road, Killiney and the former Aldi Site, Sandyford Business District. Collectively, these sites provide a total of 1624 units (414 houses + 1210 apartments).



**Total No. of Sites with Planning Permission**  
**26% increase**  
**from 80 to 101**



**Total No. of Units with Planning Permission**  
**59% increase**  
**from 6,800 to 10,814**



**Total No. of Active Sites**  
**19% increase**  
**from 37 to 44**



**Total No. of Units Under Construction**  
**15% decrease**  
**from 1,570 to 1,332**

### 3.3 South Dublin County Council

#### Year on Year comparison

##### Q3 2018 compared with Q3 2017:

- Increase in **number of units completed this quarter** from 0 units in 2017 to 134 units in 2018.
- **9%** increase in the **number of sites with planning permission** from 56 in 2017 to 61 in 2018.
- **5%** increase the **total number of units with planning permission** from 5,660 in 2017 to 5,928 in 2018
- **21%** decrease in the number of **active sites** from 28 in 2017 to 23 in 2018.
- **12%** decrease in the number of **units under construction** from 1,150 in 2017 to 1,138 in 2018.

#### Quarter Highlights

- Planning permission **lodged** under SD18A/0310, at Ardeevin Avenue, Lucan, for 25 dwelling units.
- Planning permission **granted** under SD17A/0468 for 64 dwelling units in Firhouse.
- **Adamstown SDZ** (LIHAF/MUHDS site) continues to progress steadily overall in terms of construction activity; development commenced on a new site this quarter for 237 units (151 houses, 86 apartments). The rate of construction has increased with 453 units under construction this quarter, as opposed to 380 units in Q2 2018. The rate of completions of residential units in Adamstown has significantly increased with 229 units completed this quarter, compared to 69 units in Q2 2018.

#### Strategic Housing Developments (SHD)

- **2 no. SHD** applications were lodged with An Bord Pleanála this quarter; in August, 459 no. residential units in Fortunestown, Citywest and in September, 303 no. units at Palmerstown.
- **4 no. additional applications** were also at preliminary preplanning this quarter.
- This brings the total to date of SHD applications in South Dublin to 17; a potential of 6,820 residential units.



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

**9% increase**  
from 56 to 61



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

**5% increase**  
from 5,660 to 5,928



**Total No. of Active Sites**

**21% decrease**  
from 28 to 23



**Total No. of Units Under Construction**

**12% decrease**  
from 1,150 to 1,138

### 3.4 Fingal County Council

#### Year on Year comparison

##### Q3 2018 compared with Q3 2017:

- 21% increase in the number of sites with planning permission in Tier 1 from 108 to 131;
- 11% increase in the number of units with planning permission from 15,753 to 17,482;
- 24% increase in number of active sites from 59 to 73 sites;
- 68% increase in the number of units completed and occupied in 12 month period to end Q3 2018 (1,961 units) compared to the 12 months to end Q3 2017 (1,166 units).

#### Quarter Highlights

- **Hansfield SDZ** continues to progress with a high rate of completions in this quarter, 137 units completed, up from 117 units in the previous quarter(17% increase). The rate of construction activity continues to decrease in this quarter with 204 units under construction. This reduction, however, has to be considered in the context of the high rate of completions (137 Units). Works have started on a new site for 95 Apartments.
- **Oldtown/Mooretown (MUHDS)** lands continue to progress but at a slower rate of completions, with 6 units completed in this quarter compared to 42 units in the previous quarter. The rate of construction activity however, has increased from the previous quarter, with 108 units under construction compared to 85 units in the previous quarter (27%). Also permission granted in this quarter for a further 98 units on the Oldtown lands (LIHAF Sites) under Reg Refs F17A/0735.
- **Donabate (MUHDS)** continues to progress with 62 units completed in this quarter, up from 22 units in the previous quarter [181% increase]. The rate of construction activity, however, has decreased in this quarter with 175 units under construction, down from 206 units in the previous quarter.
- Overall, there continues to be a **consistent rate of ‘under construction’ activity** between Q2 2018 (2,262 units) and Q3 2018 (2,260 units).
- The total number of Complete and Occupied Units (554) in Q3 2018 is the highest Completion rate per quarter since 2016.
- The number of Pending Applications (Tier 2A) has increased this quarter from 26, (Q2 2018) to 44, (Q3 2018) with total pending units increasing from 1573 (Q2 2018) to 2809 (Q3 2018).



**Total No. of Sites with Planning Permission**  
21% increase from 108 to 131



**Total No. of Units with Planning Permission**  
11% increase from 15,753 to 17,482



**Total No. of Active Sites**  
24% increase from 59 to 73



**Total No. of Units Under Construction**  
4% increase from 2,260 to 2,348

# 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.



