

Housing Supply Coordination Task Force For Dublin

Quarter 1 2019 Returns



May 2019



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



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Executive Summary

The 2019 Quarter 1 Dublin Housing Taskforce returns indicate a 10% increase in the cumulative number of units within Tier 1 and Tier 2A respectively, when compared with the same period in 2018 (i.e. 48,816 in Q1 2018 vs 53,586 in Q1 2019).

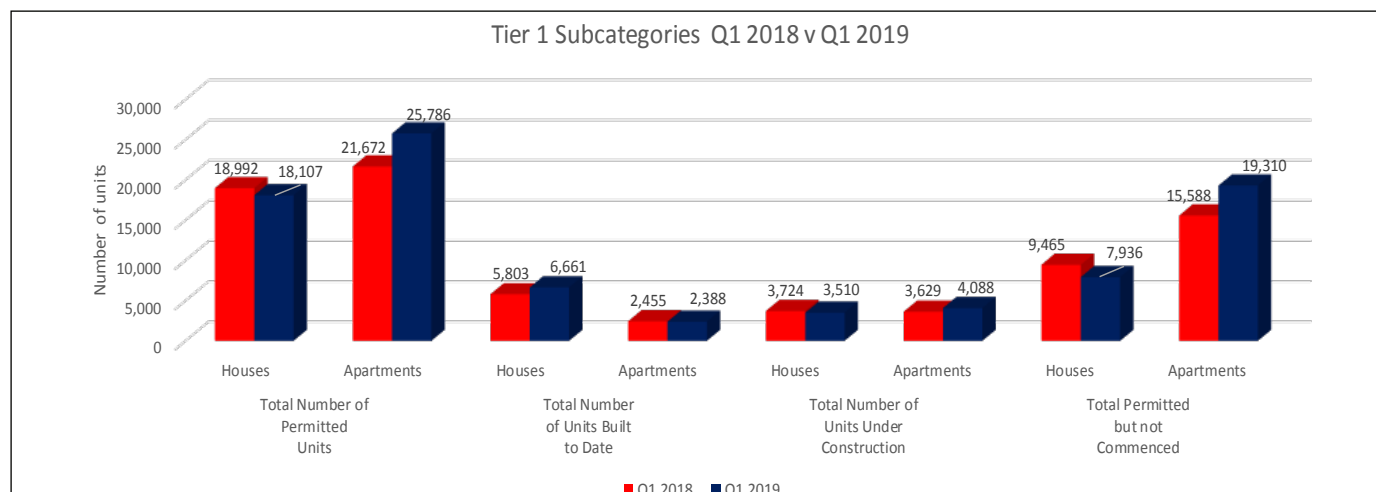


Table A: Tier 1 Subcategories Annual Comparative Analysis

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 7% from 15,611 units in Q1 2018 to 16,647 units in Q1 2019.

The total number of residential units 'built to date' showed an increase of 10% during the year (i.e. 8,258 in Q1 2018 compared with 9,049 in Q1 2019). This increase is in spite of the number of units in fully completed developments removed from Tier 1 to Tier 2C, as discussed below, and appears to be a positive trend. The number of houses 'built to date' showed an increase of 858 (15%) while the number of apartments 'built to date' showed a slight decrease of 67 (-3%).

There was a slight increase in the 'total number of units under construction' this quarter in a year on year comparison i.e. from 7,353 in Q1 2018 to 7,598 in Q1 2019. While there was a decrease in the number of houses under construction from 3,724 in Q1 2018 to 3,510 in Q1 2019 (-6%), this was more than made up for by the increase in the number of apartments under construction from 3,629 in Q1 2018 to 4,088 in Q1 2019 (13%).

Development sites which were fully completed this quarter comprised of 1,243 residential units (1,146 houses and 97 apartments), with the most significant number of completions occurring in the South Dublin County Council administrative area where 8 no. sites were fully completed comprising of 810 houses and 18 apartments. This is the third consecutive quarter whereby development sites comprising of 1,000+ units were fully completed and moved to Tier 2C.

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, but not yet commenced, (i.e. 27,246 units in Q1 2019 to 25,053 units in Q1 2018).

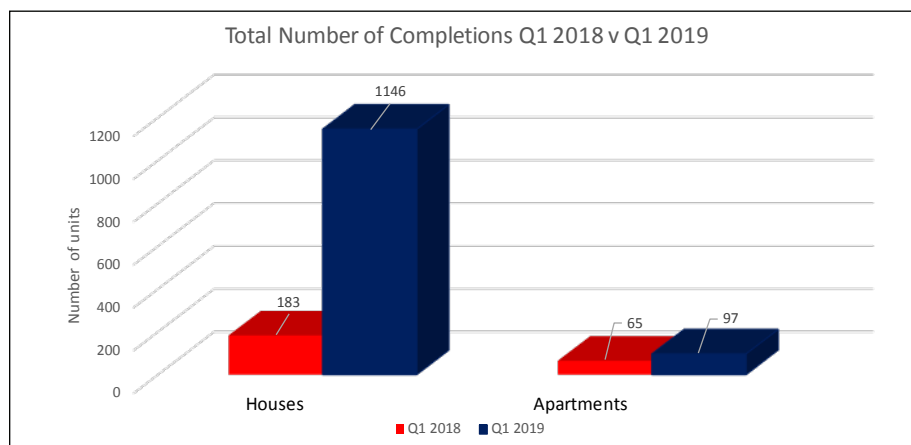


Table B: Residential Dwelling Completions Comparative Analysis

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 27,246 residential units in Q1 2019, up from 25,053 in Q1 2018, which represents a 9% increase.

While a significant quantum of housing units are awaiting the commencement of construction, there has been a decrease (16%) in the 'total permitted but not commenced' number of houses (i.e. 9,465 in Q1 2018 to 7,936 in Q1 2019). However, there has been an increase (24%) in the number of apartment units permitted but not commenced i.e. 15,588 units in Q1 2018 to 19,310 units in Q1 2019. This continues the emerging trend of recent quarters of an apparent change in housing typology with a shift towards higher density apartment developments.

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 3% from 173 sites in Q1 2018 to 178 sites in Q1 2019.

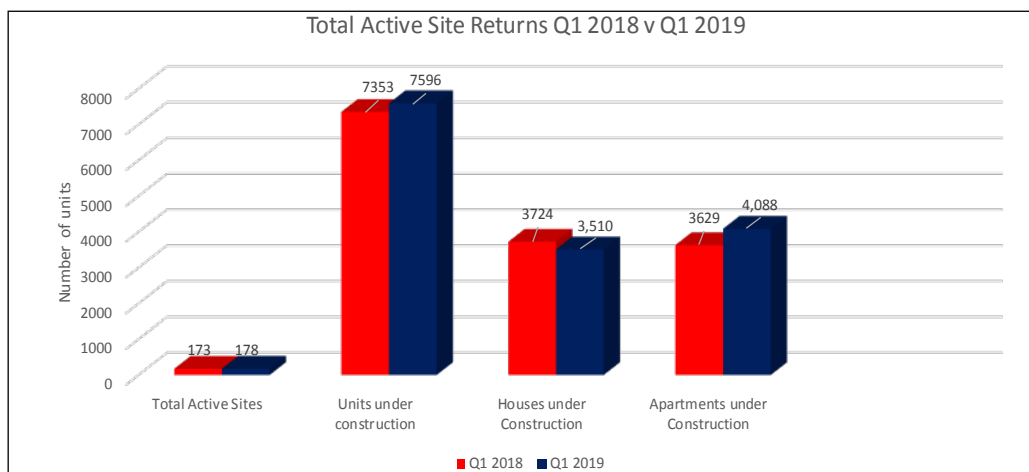


Table C: Active Sites Annual Comparative Analysis

In relation to planning applications awaiting decisions, there was a 19% increase in the overall number of Tier 2A residential units from 8,152 in Q1 2018 to 9,693 in Q1 2019. This represents an increase of 12% compared from Q4 2018 when the total was 8,689 units. The total number of houses recorded in the Tier 2A return decreased by 44% (i.e. 2,750 in Q1 2018 to 1,539 in Q1 2019), while the total number of apartments recorded in Tier 2A increased by 51% (i.e. 5,402 in Q1 2018 to 8,154 in Q1 2019) for the same period, including a significant increase of 17% from 6,977 in Q4 2018. This further supports the evident shift towards higher density apartment developments as likely to continue as the ratio of houses to apartments in Tier 2A, for which planning permission is currently being sought, stands at 1:5 across the four Dublin local authorities (1,539 houses : 8,154 apartments).

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 through 2019.

1. Introduction

The Quarter 1 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.

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	1,605	9,861	85	2,084	13,635
DLRCC	2,685	8,603	333	2,528	14,203
SDCC	4,106	2,044	380	1,407	7,937
FCC	9,711	5,278	741	2,135	17,865
Total	18.107	25.786	1,539	8,154	53.640

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	1,605	9,861	295	304	304	1,610	1,006	7,947
DLRCC	2,685	8,603	1,035	1,165	357	1,176	1,293	6,262
SDCC	4,106	2,044	1,383	24	1,106	340	1,617	1,680
FCC	9,711	5,278	3,948	895	1,743	962	4,020	3,421
Total	18,107	25,786	6,661	2,388	3,510	4,088	7,936	19,310

Table 3: Total Units in Houses & Apartments

	Tier 2A Subcategories	
	Total Number of Units	
	Houses	Apartments
DCC	85	2,084
DLRCC	333	2,528
SDCC	380	1,407
FCC	741	2,135
Total	1,539	8,154

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	23,621	6,085	0
DLRCC	33,600	2,080	9,609	4,400
SDCC	37,809	10,744	0	0
FCC	49,541	15,551	13,578	19,980
Total	173,550	51,996	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	0	0						
DLRCC	149	38						
SDCC	810	18						
FCC	187	41						
Total	1,146	97						

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

Q1 2019 compared with Q1 2018:

- 5% increase on the **number of sites with planning permission** from 132 sites to 139 sites.
- 5% increase in the **total number of units with planning permission** from 10,927 to 11,466.
- 39% decrease in **active sites** from 41 sites to 25 sites.
- 29% decrease in the **number of units under construction** from 2,695 to 1,914.

Quarterly Highlights

- There were **1,450 residential units granted** planning permission this quarter under 14no. separate planning applications.
- A further **9 applications are pending** decisions that have the potential to provide 627 residential units in the city.

Strategic Housing Developments (SHD)

- There were **2 SHD applications** with granted permission by An Bord Pleanála this quarter that would provide a total of **492 residential units**, located at Rathgar, Dublin 6 and Marino, Dublin 9 under ABP case no. 303133 and ABP case no. 303296 respectively.
- There is **1 SHD application** for student accommodation granted by An Bord Pleanála that would provide **289 student accommodation bed spaces** at Nolan Seafoods Ltd, Rathdown Road, Dublin 7 under ABP no. 302164.
- There are **4 SHD applications** awaiting decisions of An Bord Pleanála that would potentially provide a cumulative total of **693 residential units**, one of which includes **235 student bedspaces**.



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

**5% increase
from 132 to 139**



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

**5% increase
from 10,927 to 11,466**



Total No. of Active Sites

**39% decrease
from 41 to 25**



**Total No. of Units Under
Construction**

**29% decrease
from 2,695 to 1,914**

3.2 Dun Laoghaire Rathdown County Council

Year on Year comparison

Q1 2019 compared with Q1 2018:

- **18% increase in the number of sites with planning permission** from 83 sites to 98 sites.
- **65% increase in the total number of units with planning permission** from 6,849 to 11,288.
- **8% increase in active sites** from 38 sites to 41 sites.
- **11% increase in the number of units under construction** from 1,377 to 1,533.
- **120% increase in the number of completions** in this quarter from 13 to 156.

Quarter Highlights

- **3,733 residential units built to date or under construction** in Q1 2019 reflecting a slight increase in overall activity of 4%, up from 3,593 units in previous Q4 2018.
- **28% increase in the total number of residential units in Tier 2A** seeking planning permission this quarter at 2,915 units from 2,284 units in previous quarter, primarily made up of an increase in the number of apartments from 1,943 units to 2,582 units.
- **Construction commenced on Cherrywood Town Centre** development site in the Cherrywood SDZ permitted by DLR under DZ17A/0862, including **1200+** units.
- The sum total of units with planning permission this quarter is running at approximately **1:3 houses:apartments**. Units in the planning system awaiting final determination this quarter are running at nearly **1:8 houses:apartments**.

Strategic Housing Developments (SHD)

- **Construction commenced on 900+ unit SHD site at Clay Farm, Ballyogan** granted permission under ABP ref. 301522-18.
- Planning permission granted for **184 units** in parcel TC6 of Cherrywood Town Centre.
- In the last weeks of **Q1 4 new SHD applications** were lodged for a total of **731 units**.
- Combined total of residential units in **SHDs in Tiers 1 and 2A** currently stands at **3,324 units** – of which houses account for only 764 (23%).



Total No. of Sites with Planning Permission

18% increase
from 83 to 98



Total No. of Units with Planning Permission

65% increase
from 6,849 to 11,288



Total No. of Active Sites

8% increase
from 38 to 41



Total No. of Units Under Construction

11% increase
from 1,377 to 1,533

3.3 South Dublin County Council

Year on Year comparison

Q1 2019 compared with Q1 2018:

- **13% increase** in the **number of sites with planning permission** from 53 sites to 60 sites.
- **15% increase** in the **total number of units with planning permission** from 5,368 to 6,150.
- **16% increase** in the **number of active sites** from 25 sites to 29 sites.
- **44% increase** in the **number of units under construction** from 1,001 to 1,446.
- **52% increase** in the **number of units completed** in the 12 month period to end Q1 2019 (1,303 units) compared to the 12 month period to end Q1 2018 (857 units).

Quarter Highlights

- **10% decrease** in the **total number of residential units with planning permission** this quarter at 6,150 from 6,842 in previous quarter reflecting the significant number of houses moved to Tier 2C.
- **8 development sites fully completed** and moved to Tier 2C this quarter providing for a total of **828 units** (810 houses and 18 apartments).
- **7% increase** in the **total number of residential units under construction** this quarter at 1,446 from 1,354 in previous quarter, primarily made up in increase in apartment construction from 202 units to 340.
- **Adamstown SDZ** (LIHAF/MUHDS) continues to progress steadily overall in terms of construction activity. The rate of construction has increased with 624 units under construction this quarter, as opposed to 578 units in Q4 2018. The rate of completions of residential units decreased this quarter with 103 units completed, compared to 59 units in Q4 2018.

Strategic Housing Developments (SHD)

- Permission **granted** by An Bord Pleanála for a SHD of **526 residential units** in Fortunestown.
- **Construction commenced** on 2 SHD sites in Fortunestown with permission for cumulative total of **1,000+ units** under ABP Ref Nos. 302398-18 and 300555-18
- 2 SHD applications **lodged** with An Bord Pleanála for a cumulative total of 346 build to rent apartments and 222 shared accommodation bedspaces, both in Cookstown, Tallaght.
- 9 SHD applications are currently at **pre-planning** with An Bord Pleanála and SDCC with potential for **4,896 units**.
- 18 SHD applications are currently at **preliminary stage** of pre-planning with SDCC with potential for **6,161 units**.



Total No. of Sites with Planning Permission
13% increase
from 53 to 60



Total No. of Units with Planning Permission
15% increase
from 5,368 to 6,150



Total No. of Active Sites
16% increase
from 25 to 29



Total No. of Units Under Construction
44% increase
from 1,001 to 1,446

3.4 Fingal County Council

Year on Year comparison

Q1 2019 compared with Q1 2018:

- 8% increase in the **number of sites with planning permission** from 124 to 134;
- 14% decrease in the **number of units with planning permission** from 17,522 to 14,989;
- 22% increase in **number of active sites** from 68 to 83 sites;
- 19% increase in the **number of units under construction** from 2,280 to 2,705 units;
- 36% increase in the **number of units completed** and occupied in 12 month period to end Q1 2019 (1,754 units) compared to the 12 months to end Q1 2018 (1,294 units).

Quarter Highlights

- 7% increase in the number of units 'Under Construction' with 2,708 units this quarter up from 2,527 in Q4 2018.
- 5% increase in the number of active sites with 83 sites active this quarter from 79 in Q4 2018.
- **Hansfield SDZ** construction continues to progress. There is a consistent rate of construction activity in this quarter with 196 units under construction. Rate of completions in this quarter is consistent with 54 units completed, from 51 units in the previous quarter. There are 5no. active permissions. There is a total of 912 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 22 units completed in this quarter compared to 22 units in the previous quarter. The rate of construction activity has slightly increased, with 101 units under construction compared to 94 units in the previous quarter. 5no. sites are currently active on these lands.
- **Donabate (LIHAF/MUHDS)** continues to progress however at a slower rate of completions in this quarter, 32 units completed, down from 49 units in the previous quarter. The rate of construction activity, however, has increased significantly this quarter with 300 units under construction, up from 186 units in the previous quarter.



**Total No. of Sites with
Planning Permission**
8% increase
from 124 to 134



**Total No. of Units with
Planning Permission**
14% decrease
from 17,522 to 14,989



Total No. of Active Sites
22% increase
from 68 to 83



**Total No. of Units Under
Construction**
19% increase
from 2,280 to 2,705

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.



Housing Supply Coordination Task Force For Dublin

Quarter 2 2019 Returns



August 2019



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



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Executive Summary

The 2019 Quarter 2 Dublin Housing Taskforce returns indicate an 8% increase in the cumulative number of units within Tier 1 and Tier 2A respectively, when compared with the same period in 2018 (i.e. 51,289 in Q2 2018 vs 55,291 in Q2 2019).

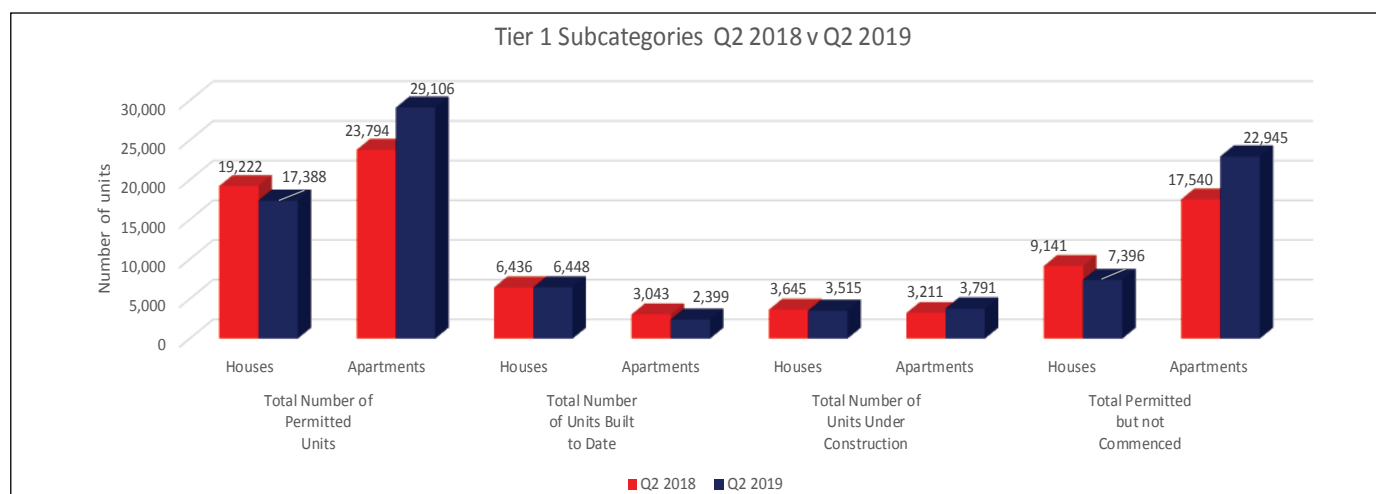


Table A: Tier 1 Subcategories Annual Comparative Analysis

In the analysis of construction activity, the total number of ‘units built to date’ showed a decrease of 7% during the year, i.e. 9,479 in Q2 2018 compared with 8,847 in Q2 2019. The decrease in the total number of residential units ‘built to date’ in Tier 1 is understandable in the context of the number of units in fully completed developments removed from Tier 1 to Tier 2C, discussed below, which has been consistently high in the last four quarters. The number of houses ‘built to date’ increased by 12no. units (0%) while the number of apartments ‘built to date’ showed a decrease of 644no. units (-21%).

There was an increase of 7% in the ‘total number of units under construction’ this quarter in a year on year comparison i.e. from 6,856 in Q2 2018 to 7,306 in Q2 2019. There was a decrease of 4% in the number of houses under construction from 3,645 in Q2 2018 to 3,515 in Q2 2019 which was made up for by an 18% increase in the number of apartments under construction from 3,211 in Q2 2018 to 3,791 in Q2 2019. The number of units under construction in Dublin City has declined in the year-on-year comparison of the last four quarters, while, from a housing supply capacity perspective, the number of units permitted but not commenced in Dublin City has increased consistently over the same period, currently standing at 9,476no. units. National policy updates (Ministerial Apartment Guidelines in March 2018 and Height Guidelines in December 2018) may have influenced the timing of commitments to apartment developments with a high number recently permitted or going through the planning process as represented in Tier 2A.

The number of apartments under construction has now been greater than the number of houses under construction for three consecutive quarters across the Dublin region. There are variances between the local authorities with Dublin City and Dún Laoghaire Rathdown consistently showing significantly more activity in apartments under construction compared to houses. Apartment activity in Fingal and South Dublin has been growing and indicators for the future show a potential shift towards apartments as the predominant housing type to be provided, as demonstrated by the number of units permitted but not commenced as of Q2 2019 (1,362 houses : 2,023 apartments in South Dublin and 3,764 houses : 4,640 apartments in Fingal).

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 to construction activity. Of the 6,012no. residential units granted permission by An Bord Pleanála under the SHD process across the four local authorities, no residential units have been built to date and 337no. units are currently under construction. This level of activity represents 6% of the overall number of units granted permission under the SHD process. While the SHD process has only been in place for 2 years, which may explain a lower than average rate, this is significantly less than the overall level of activity for all of Tier 1 at 35% with a cumulative total of 16,153no. units built to date and/or under construction out of a total of 46,494no. permitted units in the Dublin region.

Development sites which were fully completed this quarter comprised of 1,641no. residential units (923no. houses and 718no. apartments). This was distributed across the four local authorities, but most pronounced in the Fingal and Dublin City administrative areas where fully completed development sites comprised of 563no. units (495no. houses and 68no. apartments) and 467no. units (17no. houses and 450no. apartments), respectively.

This is the fourth consecutive quarter whereby development sites comprising of 1,000+ units were fully completed and moved to Tier 2C which represents a positive trend and may be an indicator for increased construction activity through 2019 as developments are finished and activity moves on to other sites with planning permission, but not yet commenced construction.

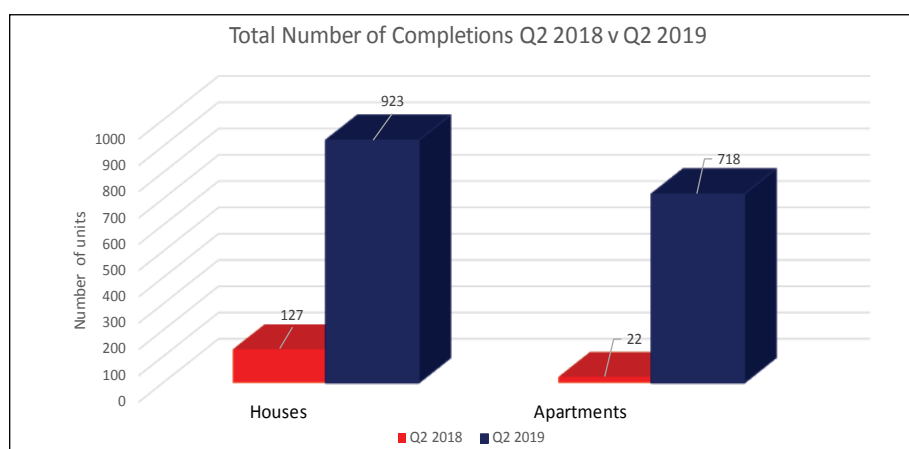


Table B: Residential Dwelling Completions Comparative Analysis

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 30,341no. residential units in Q2 2019, up from 26,681 in Q2 2018, which represents a 14% increase.

While a significant quantum of housing units are awaiting the commencement of construction, there has been a decrease (19%) in the 'total permitted but not commenced' number of houses from 9,141 in Q2 2018 to 7,396 in Q2 2019. However, there has been an increase (31%) in the number of apartment units permitted but not commenced from 17,540 units in Q2 2018 to 22,945 units in Q2 2019. This continues the trend of recent quarters of an apparent change in housing typology with a shift towards higher density apartment developments.

With regards to the number of active sites in the Dublin region, on a year on year comparison, the number of sites has decreased by 5% from 178 sites in Q2 2018 to 169 sites in Q2 2019. The fact that the number of units under construction has risen in the same period by 7% from 6,856 to 7,306 units demonstrates that activity is more concentrated on a higher number of residential units on less sites, a likely result of the trend towards apartment construction which is more focussed and resource intensive, but provides for a higher number of units.

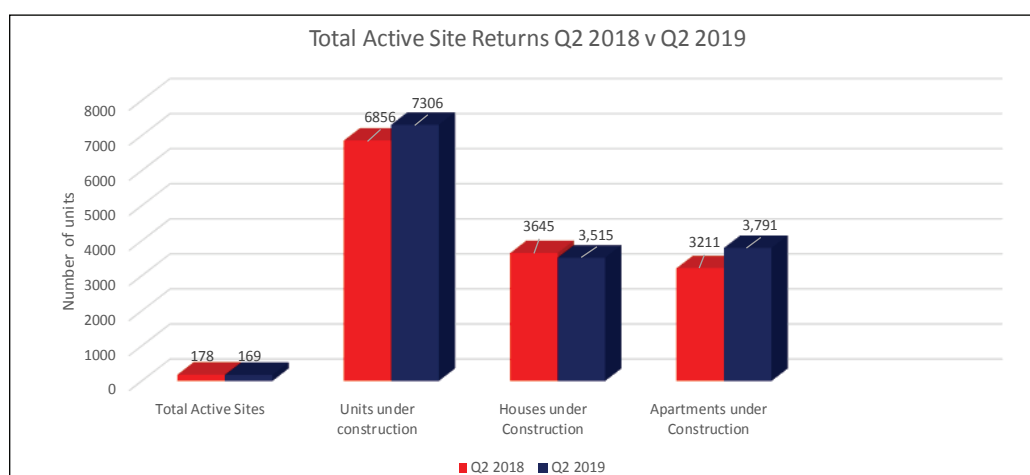


Table C: Active Sites Annual Comparative Analysis

In relation to planning applications awaiting decisions, there was a 6% increase in the overall number of Tier 2A residential units from 8,273 in Q2 2018 to 8,797 in Q2 2019. The total number of houses recorded in the Tier 2A return decreased by 47% (i.e. 2,607 in Q2 2018 to 1,380 in Q2 2019), while the total number of apartments recorded in Tier 2A increased by 31% (i.e. 5,666 in Q2 2018 to 7,417 in Q2 2019) for the same period. This further supports the evident shift towards higher density apartment developments as likely to continue as the ratio of houses to apartments in Tier 2A, for which planning permission is currently being sought, stands at 1:5 across the four Dublin local authorities (1,380 houses : 7,417 apartments).

1. Introduction

The Quarter 2 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.

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	1,481	10,148	52	4,149	15,830
DLRCC	2,819	10,059	163	2,040	15,081
SDCC	3,865	2,472	479	408	7,224
FCC	9,223	6,427	686	820	17,156
Total	17,388	29,106	1,380	7,417	55,291

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	1,481	10,148	313	220	281	1,339	887	8,589
DLRCC	2,819	10,059	937	1,314	470	1,081	1,383	7,693
SDCC	3,865	2,472	1,407	16	1,096	433	1,362	2,023
FCC	9,223	6,427	3,791	849	1,668	938	3,764	4,640
Total	17,388	29,106	6,448	2,399	3,515	3,791	7,396	22,945

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	1,214	0	0	1,214
DLRCC	3,227	0	36	3,191
SDCC	1,421	0	166	1,255
FCC	150	0	135	15
Total	6,012	0	337	5,675

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	52	4,149
DLRCC	163	2,040
SDCC	479	408
FCC	686	820
Total	1,380	7,417

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	23,102	6,085	0
DLRCC	33,600	979	9,609	4,400
SDCC	37,707	10,642	0	0
FCC	49,541	15,551	13,578	19,980
Total	173,448	50,274	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	0	0	17	450				
DLRCC	149	38	142	100				
SDCC	810	18	269	100				
FCC	187	41	495	68				
Total	1,146	97	923	718				

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

Q2 2019 compared with Q2 2018:

- 4% increase on the **number of sites with planning permission** from 138 sites to 143 sites.
- 6% increase in the total **number of units with planning permission** from 10,906 to 11,629.
- 50% decrease in **active sites** from 42 sites to 21 sites.
- 25% decrease in the **number of units under construction** from 2,173 to 1,620.

Quarterly Highlights

- There were **4no. development sites fully completed** and moved to Tier 2C this quarter comprising a total of **450 residential units** (17no. houses and 450no. apartments).
- There were **1,821 residential units granted** planning permission this quarter under 12no. separate planning applications.
- A further **16no. planning applications are pending** decisions that have the potential to provide **3,102no. residential units** in the city.

Strategic Housing Developments (SHD)

- A **SHD application** was granted permission by An Bord Pleanála this quarter that would provide a total of **265no. Build to Rent apartments**, located on Davitt Road, Dublin 12 under ABP case no. 303435. Part of SHD ABP no. 303436, described hereunder with student accommodation, also included 37no. Build to Rent apartments.
- There were **2no. SHD applications** for student accommodation granted permission by An Bord Pleanála that would provide for a cumulative total of **492no. student accommodation bed spaces** at Parnell St, Dublin 1 and Mill Street, Dublin 8 under ABP case nos. 303615 and 303436 respectively.
- There are **5no. SHD applications** awaiting decisions of An Bord Pleanála that would potentially provide a cumulative total of **1,826no. residential units**.



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

**4% increase
from 138 to 143**



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

**6% increase
from 10,906 to 11,629**



Total No. of Active Sites

**50% decrease
from 42 to 21**



**Total No. of Units Under
Construction**

**25% decrease
from 2,173 to 1,620**

3.2 Dun Laoghaire Rathdown County Council

Year on Year comparison

Q2 2019 compared with Q2 2018:

- **30% increase** in the **number of sites with planning permission** from 87 sites to 113 sites.
- **49% increase** in the **total number of units with planning permission** from 8,642 to 12,878.
- **No change** in the **number of active sites** at 41 sites.
- **12% increase** in the **number of units under construction** from 1,388 to 1,551.
- **69% increase** in the **number of completions** in this quarter from 198 to 335.

Quarterly Highlights

- **14% increase** in the **total number of residential units with planning permission** this quarter at 12,878 from 11,288 in previous quarter.
- There were **5no. development sites fully completed** and moved to Tier 2C this quarter comprising of a total of **242no. residential units** (142no. houses and 100no. apartments).
- The sum total of units with planning permission this quarter is running at approximately **1:3 houses:apartments**. Units in the planning system awaiting final determination this quarter are running at nearly **1:12 houses:apartments**.

Strategic Housing Developments (SHD)

- **Planning permission granted** by An Bord Pleanála for: 1. **221no. units** (211 apartments and 10 houses) at Chesterfield, Cross Avenue, Blackrock; 2. **291no. units** at St Theresa's House/ Centre and St Teresa's Lodge, Temple Hill, Blackrock; 3. **142no. Build-to-Rent apartments** at Roselawn and Aberdour, Stillorgan Road, Foxrock; and 4. **817no. student bed spaces** at Avid Technology International, Carmanhall Road, Sandyford Industrial Estate.
- **Planning permission refused** by An Bord Pleanála for **123no. Build-to-Rent apartments** at Fosters Avenue, Mount Merrion.
- **SHD Applications lodged** with An Bord Pleanála for: 1. **192no. units** was lodged at Clay Farm, Ballyogan Road; 2. **428no. units** at Rockbrook, Carmanhall Road, Sandyford Business District; 3. **208no. unit Build-to-Rent Shared Living** Residential scheme at The Old School House, Eblana Avenue, Dun Laoghaire.
- Combined total of residential units in **SHDs in Tiers 1 and 2A** currently stands at **3,961no. units** – of which houses account for only 597no. (15%).



Total No. of Sites with Planning Permission

30% increase
from 87 to 113



Total No. of Units with Planning Permission

49% increase
from 8,642 to 12,878.



Total No. of Active Sites

No Change
41



Total No. of Units Under Construction

12% increase
from 1,388 to 1,551

3.3 South Dublin County Council

Year on Year comparison

Q2 2019 compared with Q2 2018:

- 7% increase in the **number of sites with planning permission** from 57 sites to 61 sites.
- 10% increase in the **total number of units with planning permission** from 5,735 to 6,337.
- 22% increase in the **number of active sites** from 23 sites to 28 sites.
- 48% increase in the **number of units under construction** from 1,033 to 1,529.
- 91% increase in the **number of units completed** in the 12-month period to end Q2 2019 (1,400 units) compared to the 12-month period to end Q2 2018 (733 units).

Quarter Highlights

- There were **4no. development sites fully completed** and moved to Tier 2C this quarter comprising of a total of **369no. residential units** (269no. houses and 100no. apartments).
- **6% increase** in the **total number of residential units under construction** this quarter at 1,529 from 1,446 in previous quarter, made up by an increase in apartment construction from 340 units to 433.
- **Adamstown SDZ** (LIHAF/MUHDS) continues to progress steadily overall in terms of construction activity. 604no. units are currently under construction, slightly down from 624no. units at end of Q1 2019. There were 172no. units completed this quarter, up from 103no. units in Q1 2019.

Strategic Housing Developments (SHD)

- **Two SHD decisions** issued by An Bord Pleanála this quarter: 1. Permission **granted** for **438no. apartments and 403no. student bedspaces** in Tallaght under ABP Ref No. 303306, and 2. Permission **refused** for **150no. apartments and 222no. shared living bedspaces** in Cookstown under ABP Ref No. 303911.
- **166no. houses currently under construction** on two SHD sites in Fortunestown, under ABP Ref Nos. 302398 and 300555.
- A SHD for **196no. build to rent apartments** in Cookstown awaiting decision of An Bord Pleanála.
- 12no. SHD applications are currently at the **second stage of the process** at pre-planning with An Bord Pleanála and SDCC with potential for **5,460no. units**.
- **23no. SHD applications** are currently at the **first stage of the process** at pre-planning with SDCC with potential for **7,032no. units**.



Total No. of Sites with Planning Permission
7% increase
from 57 to 61



Total No. of Units with Planning Permission
10% increase
from 5,735 to 6,337



Total No. of Active Sites
22% increase
from 23 to 28



Total No. of Units Under Construction
48% increase
from 1,033 to 1,529

3.4 Fingal County Council

Year on Year comparison

Q2 2019 compared with Q2 2018:

- 6% increase in the **number of sites with planning permission** from 127 sites to 135 sites.
- 12% decrease in the **total number of units with planning permission** from 17,733 to 15,650.
- 10% increase in the **number of active sites** from 72 sites to 79 sites.
- 15% increase in the **number of units under construction** from 2,262 to 2,606.
- 8% decrease in the **number of units completed** in the 12-month period to end Q2 2019 (1,609 units) compared to the 12-month period to end Q2 2018 (1,758 units).

Quarter Highlights

- There were **7no. development sites fully completed** and moved to Tier 2C this quarter comprising of a total of **563no. residential units** (495no. houses and 68no. apartments), resulting in a reduction in the number of active sites from 83 in Q1 2019 to 79 in Q2.
- **Hansfield SDZ** construction continues to progress. There is a consistent rate of construction activity in this quarter with 156no. units under construction. The number of completions in this quarter is down from 54 units in the previous quarter to 40 units this quarter, giving a total of 912 completions to date. There are 5no. active permissions on the SDZ lands. Permission was granted this quarter for 616no. units under FW18A/0110 and 247no. units under FW18A/0161.
- **Oldtown/Mooretown** (LIHAF/MUHDS). The rate of construction activity has increased with 150no. units currently under construction compared to 101no. units in the previous quarter.
- **Donabate** (LIHAF/MUHDS) continues to progress. The rate of construction activity has increased within this quarter with an additional 69no. units under construction giving a total of 276no. units under construction. There is a consistent rate of completions, with 39no. new units completed in this quarter compared to 32no. in Q1 2019.
- **Northwood-Santry**: Over the last two quarters, there has been an increase in construction activity as well as an increase in the number of planning permissions granted. There are currently 6 extant permissions with 3 sites active. Within these active sites, there are 77no. units occupied and a total of 395no. units under construction.



**Total No. of Sites with
Planning Permission**
6% increase
from 127 to 135



**Total No. of Units with
Planning Permission**
12% decrease
from 17,733 to 15,650



Total No. of Active Sites
10% increase
from 72 to 79



**Total No. of Units Under
Construction**
15% increase
from 2,262 to 2,606

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.



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

**Rebuilding
Ireland**

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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.)

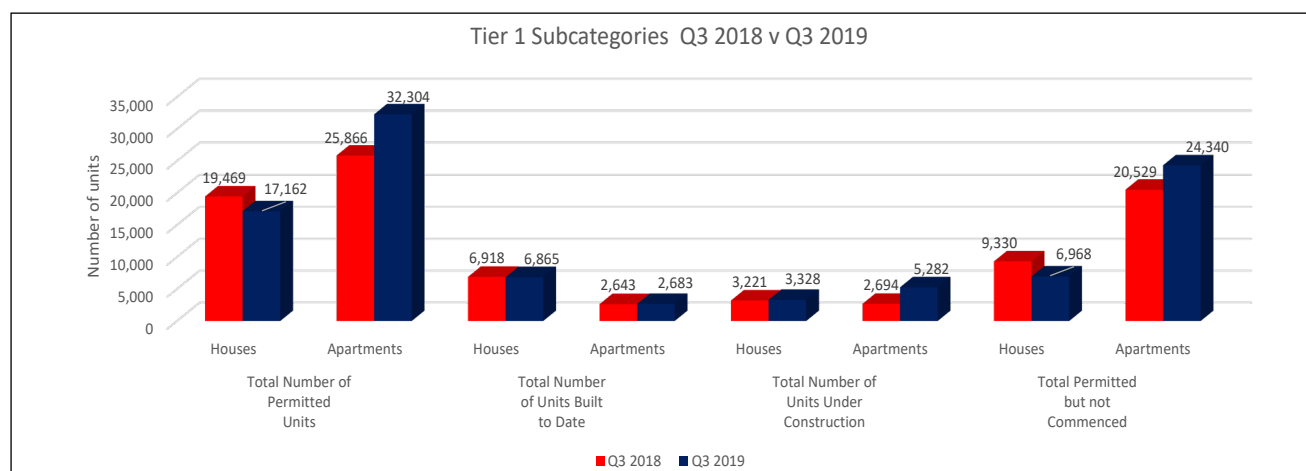


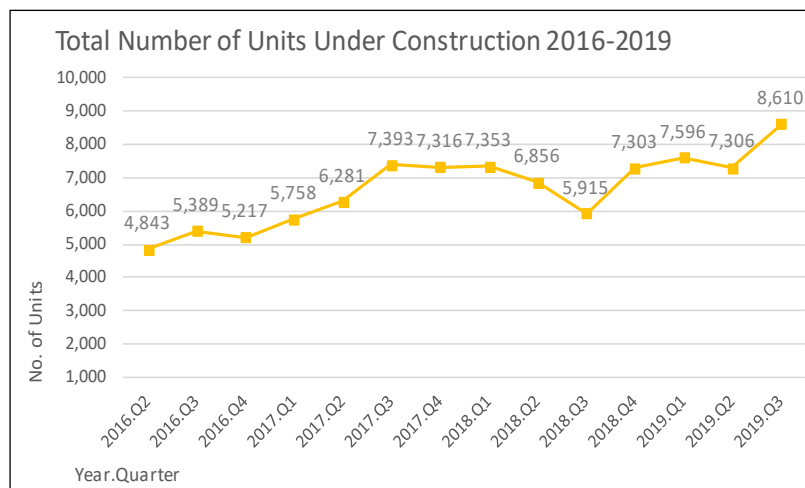
Table A: Tier 1 Subcategories Annual Comparative Analysis

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%).

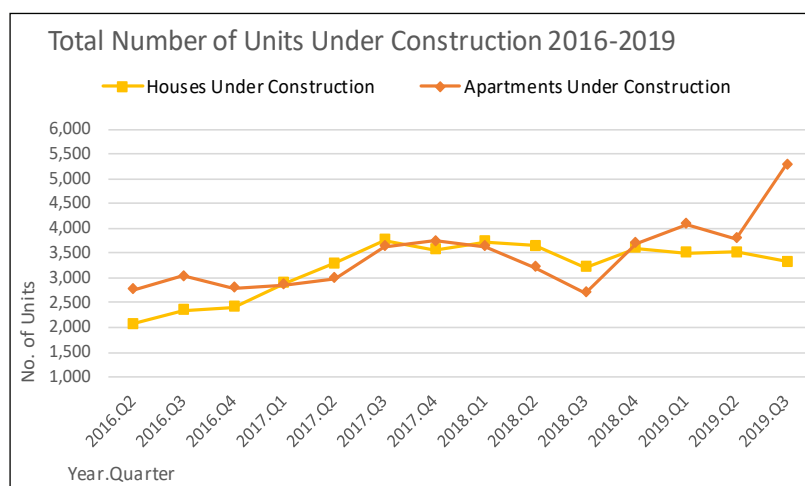
Units under Construction (ie. units being constructed on currently active sites)

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).

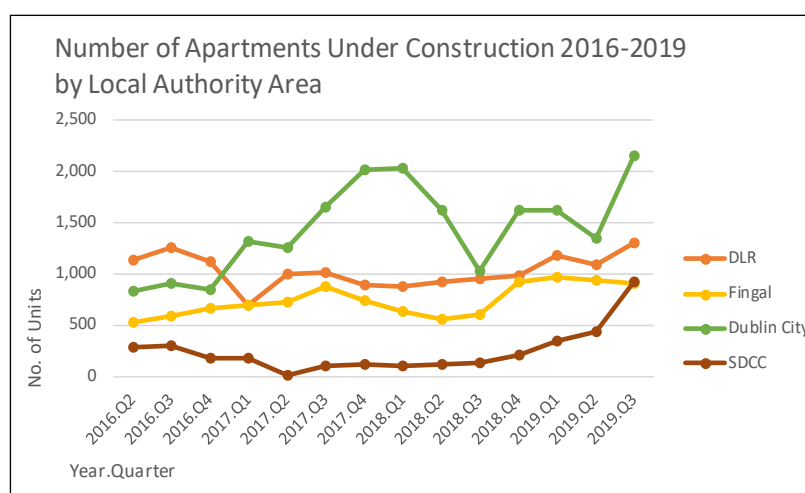


Figure 3

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.

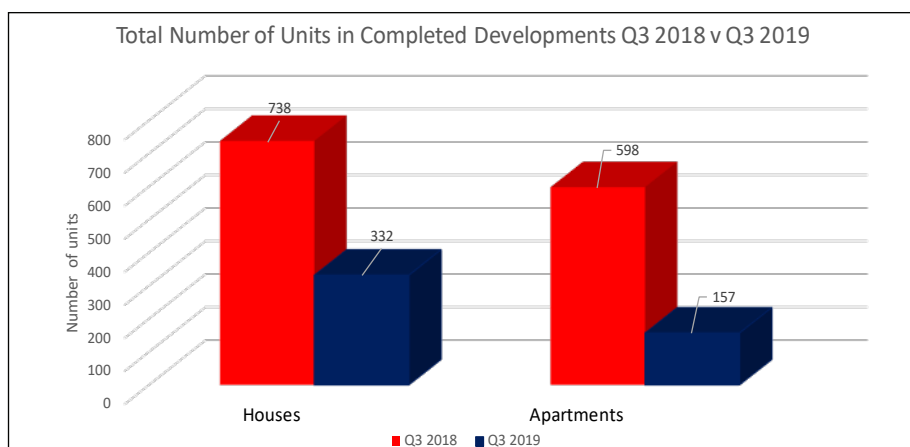


Table B: Residential Dwelling Completions Comparative Analysis

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.

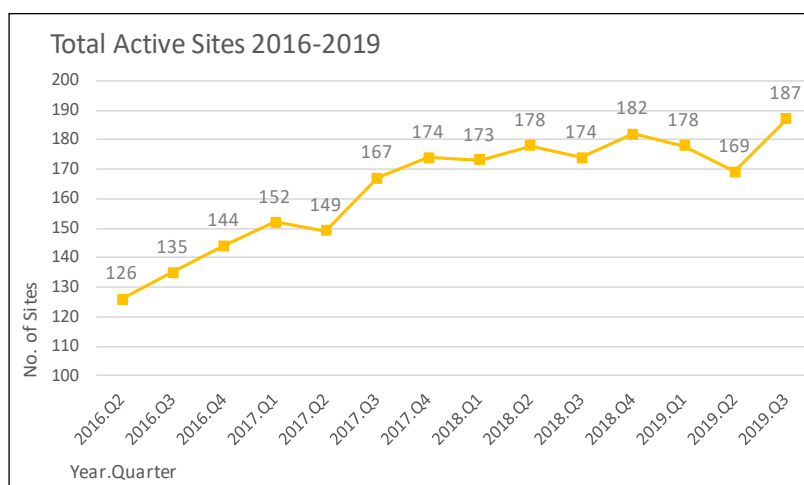


Figure 4

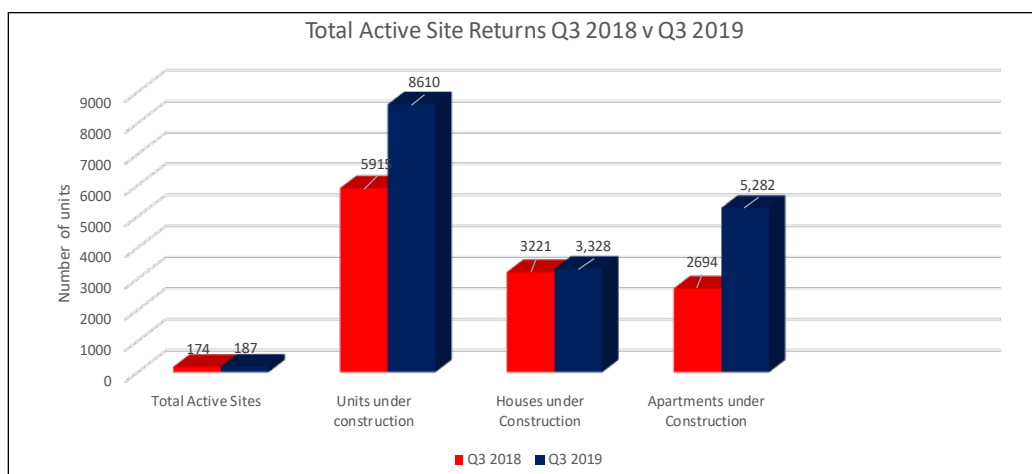


Table C: Active Sites Annual Comparative Analysis

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.



Housing Supply Coordination Task Force For Dublin

Quarter 4 2019 Returns



April 2020



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

Rebuilding
Ireland

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Executive Summary

The 2019 Quarter 4 Dublin Housing Taskforce returns indicate the following trends.

Planning Permissions

A 29% 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. 52,599 in Q4 2018 vs 70,182 in Q4 2019). (Please refer to Appendix 1 for a definition of the different tiers.)

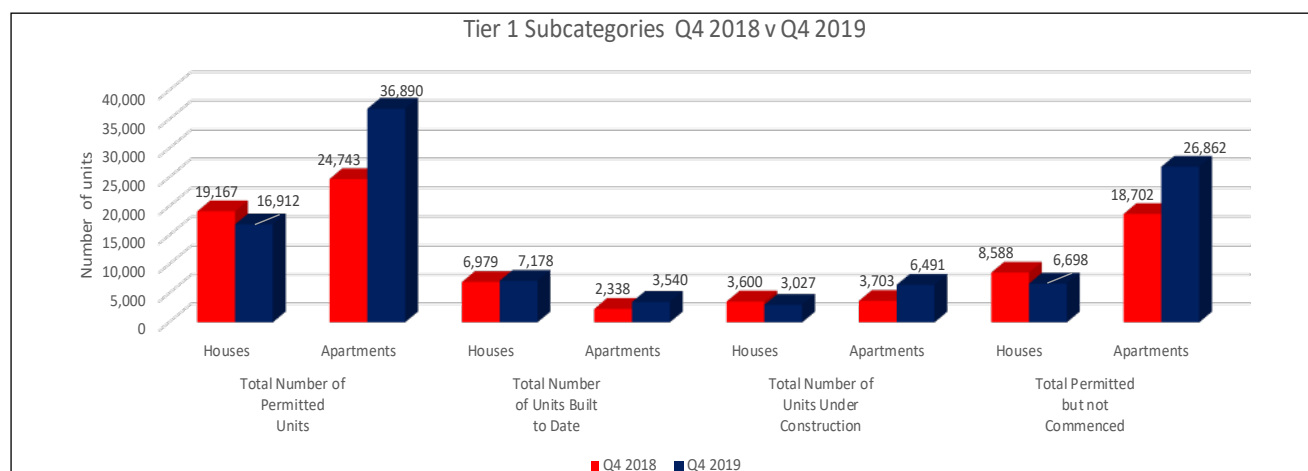


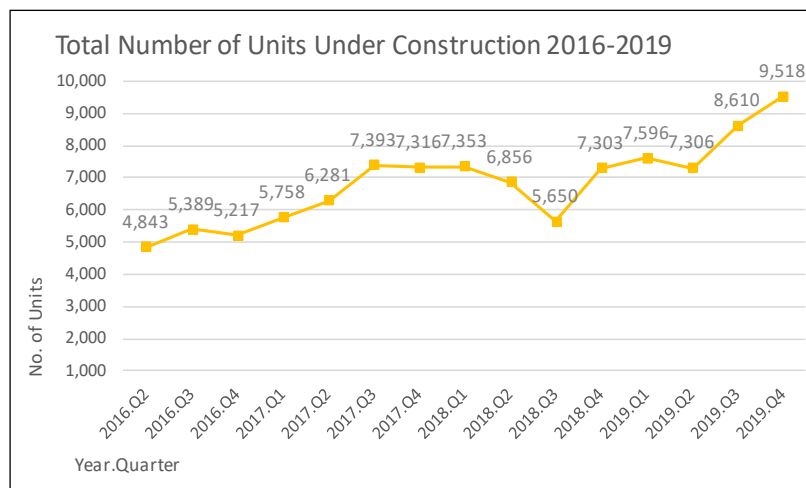
Table A: Tier 1 Subcategories Annual Comparative Analysis

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 an increase of 14% during the year, i.e. 9,317 in Q4 2018 compared with 10,718 in Q4 2019. This increase in the total number of residential units 'built to date' in Tier 1 is substantial at 1,401 no. units. Closer analysis of the figures indicates that the number of apartments 'built to date' showed an increase of 1,202 no. units (41%) and the number of houses 'built to date' increased by 199 no. units (2.8%).

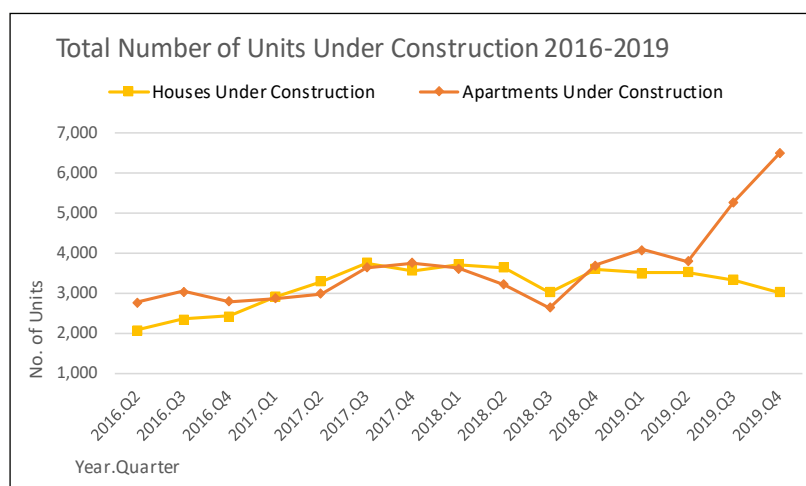
Units under Construction (ie. units being constructed on currently active sites)

There was a significant increase of 30% in the 'total number of units under construction' this quarter in a year on year comparison (i.e. from 7,303 in Q4 2018 to 9,518 in Q4 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 75% increase in apartments under construction from 3,703 in Q4 2018 to 6,491 in Q4 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 five consecutive quarters across the Dublin region (see Figure 2).

There was a 16% decrease in the number of houses under construction from 3,600 in Q4 2018 to 3,027 in Q4 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).

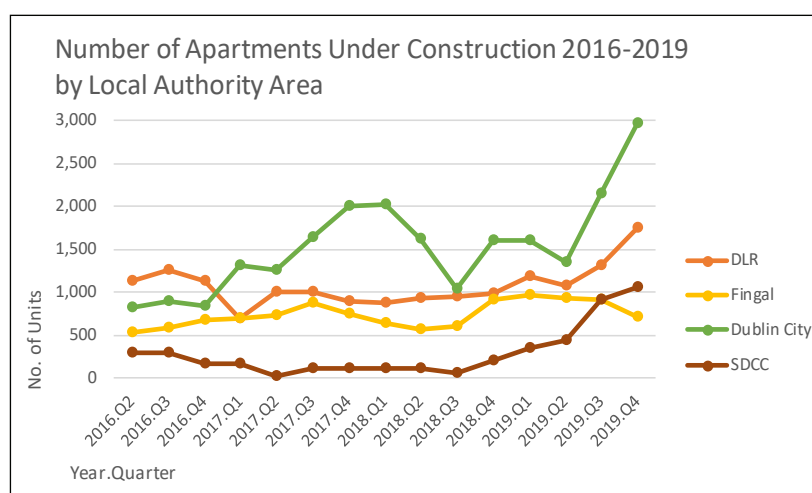


Figure 3

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 12,180 no. residential units granted permission by An Bord Pleanála under the SHD process across the four local authorities, 148 no. residential units have been built to date and 1,497 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 38% with a cumulative total of 20,236 no. units built to date and/or under construction out of a total of 53,802 no. permitted units in the Dublin region.

Developments Completed in Full (see Table 5 below)

Development sites which were fully completed this quarter comprised 749 no. residential units (660 no. houses and 89 no. apartments). This was most pronounced in the South Dublin County Council and Fingal County Council administrative areas where fully completed development sites comprised 269 no. units (259 no. houses and 10 no. apartments) and 252 no. units (216 no. houses and 36 no. apartments), respectively.

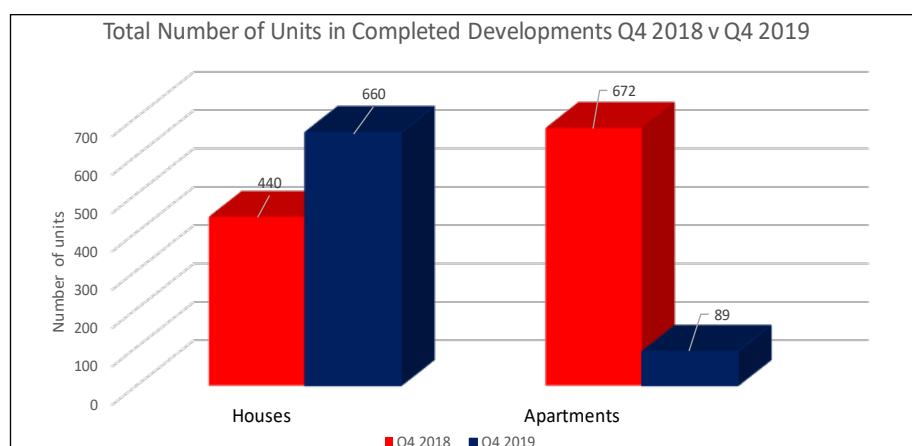


Table B: Residential Dwelling Completions Comparative Analysis

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 33,560 no. residential units in Q4 2019, up from 27,290 in Q4 2018, which represents a 23% increase.

While a significant quantum of housing units are awaiting the commencement of construction, there has been a decrease (22%) in the 'total permitted but not commenced' number of houses from 8,588 in Q4 2018 to 6,698 in Q4 2019. However, there has been an increase (44%) in the number of apartment units permitted but not commenced from 18,702 units in Q4 2018 to 26,862 units in Q4 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 14% from 182 sites in Q4 2018 to 207 sites in Q4 2019. The number of units under construction has risen in the same period by 30% from 7,303 to 9,518 units, indicating the trend towards apartment construction, which is more focussed and resource intensive, but provides for a higher number of units.

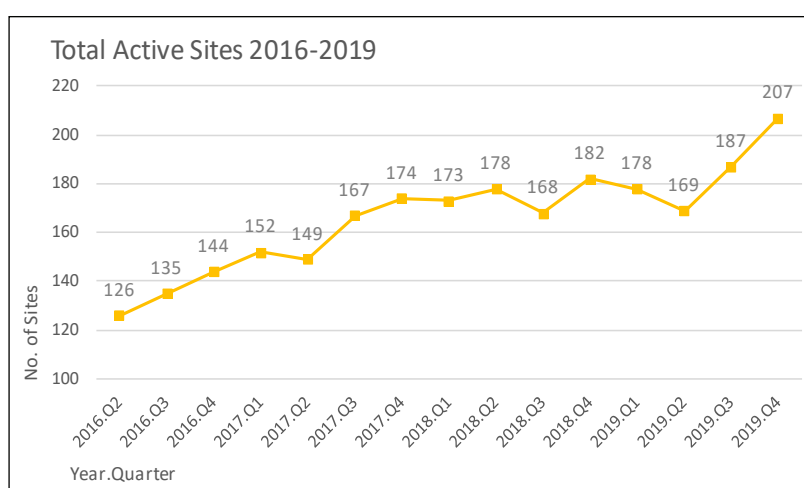


Figure 4

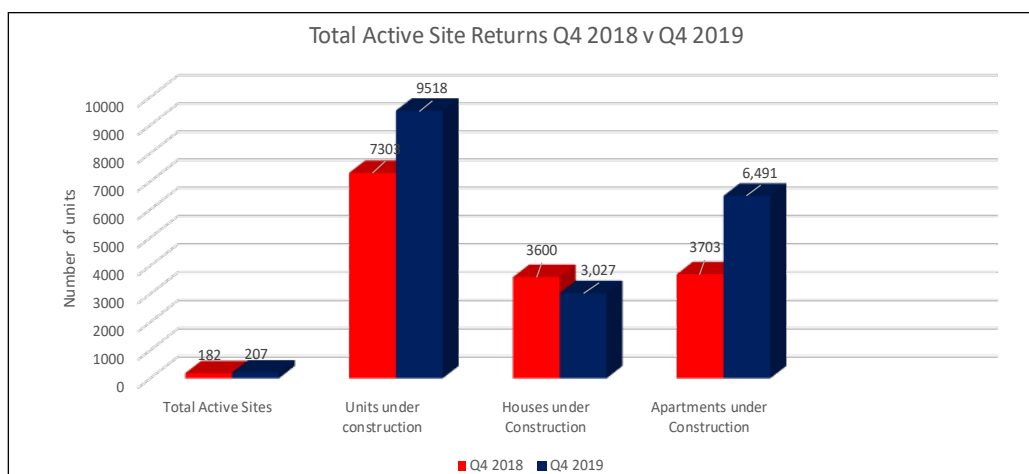


Table C: Active Sites Annual Comparative Analysis

Planning Applications

In relation to planning applications awaiting decisions, there was an 89% increase in the overall number of Tier 2A residential units from 8,689 in Q4 2018 to 16,390 in Q4 2019. The total number of houses recorded in the Tier 2A return increased by 113% (i.e. 1,712 in Q4 2018 to 3,639 in Q4 2019), while the total number of apartments recorded in Tier 2A increased by 83% (i.e. 6,977 in Q4 2018 to 12,751 in Q4 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 1:3.5 across the four Dublin local authorities (3,639 houses and 12,751 apartments, respectively).

1. Introduction

The Quarter 4 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	1,420	14,849	22	5,311	21,647
DLRCC	2,732	12,669	432	2,457	18,290
SDCC	3,674	2,946	1,722	2,498	10,840
FCC	9,086	6,381	1,463	2,475	19,405
Total	16,912	36,890	3,639	12,741	70,182

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	1,420	14,894	501	424	317	2,997	602	11,439
DLRCC	2,732	12,669	869	1,916	489	1,745	1,365	9,011
SDCC	3,674	2,946	1,701	94	739	1,059	1,234	1,793
FCC	9,086	6,381	4,107	1,106	1,482	710	3,497	4,565
Total	16,912	36,890	7,178	3,540	3,027	6,491	6,698	26,862

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	5,391	0	684	4,707
DLRCC	4,963	0	282	4,681
SDCC	1,546	105	424	1,017
FCC	150	43	107	0
Total	12,050	148	1,497	10,405

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	22	5,311
DLRCC	432	2,457
SDCC	1,722	2,498
FCC	1,463	2,485
Total	3,639	12,751

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	18,728	6,085	0
DLRCC	33,600	-3,184	9,609	4,400
SDCC	37,655	10,590	0	0
FCC	49,541	15,551	13,578	19,980
Total	173,396	41,685	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	0	0
DLRCC	149	38	142	100	101	65	185	43
SDCC	810	18	269	100	11	37	259	10
FCC	187	41	495	68	220	55	216	36
Total	1,146	97	923	718	332	157	660	89

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 2019 compared with Q4 2018:

- **17% increase** on the **number of sites with planning permission** from 138 sites to 162 sites.
- **47% increase** in the **total number of units with planning permission** from 11,090 to 16,314.
- **108% increase** in **active sites** from 25 sites to 52 sites.
- **68% increase** in the **number of units under construction** from 1,961 to 3,294.

Quarterly Highlights

- There was a **58% increase in the number of active sites** this quarter rising from 33 active sites in Q3 2019 to 52 active sites in Q4 2019.
- There were **3,082 residential units granted** planning permission this quarter under 11 no. separate planning applications, (including 5 No. SHDs which contributed to 2,793 units + 84 no. shared co-living spaces, totally 2,877 units).
- A further **24 no. planning applications are pending** decisions that have the potential to provide **3,610 no. residential units** in the city.

Strategic Housing Developments (SHD)

- 5 No. **SHD applications** were granted permission by An Bord Pleanála this quarter that would provide a total of **2,877 no. residential units**. These are located at: 1) City Block 2, Spencer Dock, Dublin 1 under ABP case no. 305219 for 464 residential units plus 84 no. shared co-living spaces, totalling 548 units. 2) East Wall Road, Dublin 3 under ABP case No. 304710 for 554 residential units 3) Clongriffin, Dublin 13 under ABP no. 305316 for 1,030 residential units. 4) Clongriffin, Dublin 13 under ABP No. 305319 for 500 residential units. 5) Part of former Premier Diaries Site, Finglas Road, Dublin 11 under ABP no. 305312 for 245 residential units.
- There were 3. no **SHD applications** for student accommodation granted permission by An Bord Pleanála within this quarter to provide a total of 1,925 bedspaces. These are located at: 1) South Circular Road, Dublin 8 under ABP no. 305061 for 317 bedspaces. 2) Site known as a portion of Brewery Block, Dublin 8 under ABP no. 305324 for 368 bedspaces. 3) DCU Glasnevin Campus, Collins Avenue Extension, Dublin 9 under ABP no. 305405 for 1,240 bedspaces.
- There are **7 no. SHD applications** awaiting decisions of An Bord Pleanála that would potentially provide a cumulative total of **2,959 no. residential units**.



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

**17% increase
from 138 to 162**



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

**47% increase
from 11,090 to 16,314**



Total No. of Active Sites

**108% increase
from 25 to 52**



**Total No. of Units Under
Construction**

**68% increase
from 1,961 to 3,294**

3.2 Dun Laoghaire Rathdown County Council

Year on Year comparison

Q4 2019 compared with Q4 2018:

- **33% increase** in the **number of sites with planning permission** from 101 sites to 134 sites.
- **40% increase** in the **total number of units with planning permission** from 11,038 to 15,401.
- **11% decrease** in the **number of active sites** from 46 sites to 41 sites.
- **53% increase** in the **number of units under construction** from 1,461 to 2,234.
- **110% increase** in the **number of completions** in this quarter from 276 to 580.

Quarterly Highlights

- **9% decrease** in the **total number of residential units with planning permission** this quarter at 14,139 from 15,401 in previous quarter.
- There were **7 no. development sites fully completed** and moved to Tier 2C this quarter comprising of a total of **558 no. residential units** (158 no. houses and 400 no. apartments).
- The sum total of units with planning permission this quarter is running at approximately **1:5 houses:apartments**. Units in the planning system awaiting final determination this quarter are running at nearly **1:6 houses:apartments**.

Strategic Housing Developments (SHD)

- **Planning permission granted** by An Bord Pleanála for: (1) **107 no. apartments units** at Building 5, Dundrum Town Centre, Sandyford Road, Dundrum, Dublin 14; (2) **60 no. additional apartment units** at Cualanor, Upper Glenageary Road, Co. Dublin, resulting in 1,082 units in total on this site ; (3) **287 no. Build-to-Rent apartments** at Lands adjacent to 'The Grange', Brewery Road/Stillorgan Road, Stillorgan, Co Dublin; (4) **232 no. Build-to-Rent apartments** at Stillorgan Leisureplex, Old Dublin Road, Stillorgan, Co Dublin; (5) **342 no. units** at Lands at Brennanstown, Dublin 18, (Cherrywood SDZ)
- **SHD Applications for Build-To-Rent apartments lodged** with An Bord Pleanála for (1) **564 no. units** at Former Aldi site, Carmanhall Road, Sandyford Business District, Dublin 18; (2) **468 no. residential units** (16 no. houses, 452 no. Build-To-Rent apartments) at Cornelscourt Village, Old Bray Road, Cornelscourt, Dublin 18.
- **SHD Applications lodged** with An Bord Pleanála for: (1) 685 no. residential units (**207 no. houses, 478 no. apartments**) at Townland of Corke Little and Shanganagh, Woodbrook, Shankill, Co Dublin; (2) **234 no. apartments** at Former Doyle's Nursery Garden Centre, Brennanstown Road, Cabinteely, Dublin 18; (3) **197 no. residential units** (62 houses, 135 no. apartments) at Glenamuck Road/Enniskerry Road, Kilternan, Co Dublin.
- Combined total of residential units in **SHDs in Tiers 1 and 2A** currently stands at **7,171 no. units** – of which houses account for only 908 no. (12.6%).



Total No. of Sites with Planning Permission
33% increase
from 101 to 134



Total No. of Units with Planning Permission
40% increase
from 11,038 to 15,401



Total No. of Active Sites
11% decrease
from 46 to 41



Total No. of Units Under Construction
53% increase
from 1,461 to 2,234

3.3 South Dublin County Council

Year on Year comparison

Q4 2019 compared with Q4 2018:

- **6% decrease** in the **number of sites with planning permission** from 64 sites to 60 sites.
- **3% decrease** in the **total number of units with planning permission** from 6,842 to 6,620.
- **6% decrease** in the **number of active sites** from 32 sites to 30 sites.
- **33% increase** in the **number of units under construction** from 1,354 to 1,798.
- **8% increase** in the **number of units completed** in the 12-month period to end Q4 2019 (1,245 units) compared to the 12-month period to end Q4 2018 (1,149 units).

Quarter Highlights

- Tier 2C this quarter indicates the total completion of **269 no. residential units** (259 no. houses and 10 no. apartments).
- **4% decrease** in the **total number of residential units under construction** this quarter at 1,798 from 1,876 in previous quarter, made up by an increase in apartment construction from 920 units to 1,059 and decrease in house construction from 956 units to 739 units.
- **Adamstown SDZ** (LIHAF/MUHDS) continues to progress steadily overall in terms of construction activity. 600 no. units are currently under construction, slightly down from 621 no. units at end of Q3 2019.
- Planning permission **granted** under SDZ19A/0004 in Adamstown SDZ for 237 dwelling units.

Strategic Housing Developments (SHD)

- **Two SHD decisions** were issued by An Bord Pleanála this quarter: Permission **Granted** for **1034 no. residential units (578 no. houses and 456 no. apartments)** at Lands at Kilcarberry under ABP Ref No. 305267. Permission **Granted** for **380 no. residential units (255 no. houses and 125 no. apartments)** at Newcastle South & Ballynakelly under ABP Ref No. 305343.
- **425 no. houses are currently under construction** on two SHD sites in Fortunestown, under ABP Ref Nos. 302398 and 300555.
- **6 no. SHD applications** were lodged with An Bord Pleanála (i.e. at the third stage of the process) during Q4, with potential for 2,193 units.
- **5 no. new SHD applications** were received for the second stage of the process at pre-planning with An Bord Pleanála and SDCC during Q4 with potential for **1,286 units**.
- **4 no. new SHD applications** were received and at the **first stage of the process** at pre-planning with SDCC during Q4 with potential for **801 no. units**.



Total No. of Sites with Planning Permission
6% decrease
from 64 to 60



Total No. of Units with Planning Permission
3% decrease
from 6,842 to 6,620



Total No. of Active Sites
6% decrease
from 32 to 30



Total No. of Units Under Construction
33% increase
from 1,354 to 1,798

3.4 Fingal County Council

Year on Year comparison

Q4 2019 compared with Q4 2018:

- 0.7% increase in the **number of sites with planning permission** from 134 sites to 135 sites.
- 3.4% increase in the **total number of units with planning permission** from 14,964 to 15,467.
- 6.3% increase in the **number of active sites** from 79 sites to 84 sites.
- 13.3% decrease in the **number of units under construction**; 2,192 compared to 2,527 in Q4 2018.
- 1.4% decrease in the **number of units completed** in the 12-month period to end Q4 2018 (1,830 units) compared to the 12-month period to end Q4 2019 (1,805 units).

Quarter Highlights

- There was **3 no. development site fully completed** and removed from Tier 1 and five new planning applications were added in Q4 2019. There is a slight increase in the number of active sites from 81 in Q3 2019 to 84 in Q4. The rate of activity remains steady in the 'Under Construction' category between Q3 2019 (2,490 units) and Q4 (2,192 units). There was 616 units Newly Completed/Occupied in Q4 2019, which is the highest quarterly figure to date. **One site has expired** and has been moved to Tier 2B.
- **Hansfield SDZ** construction continues to progress. There is a consistent rate of construction activity in this quarter with 185 no. units under construction. The number of completions in this quarter is down, to 7 no. units. There are 9 no. active permissions on the SDZ lands. One site was fully completed & occupied in this quarter. There is a total of 1,004 occupied/ Completed units to date on the overall SDZ lands.
- **Oldtown/Mooretown** (LIHAF/MUHDS). The rate of construction activity has decreased with 179 no. units currently under construction compared to 200 no. units in the previous quarter, which is a decrease of 10.5%. Six of the eight sites on these lands are now active. There are 34 newly occupied units in this quarter.
- **Donabate** (LIHAF/MUHDS) continues to progress; 189 No. units under construction in Q4 2019 compared to 263 no. units in Q3 2019. The level of newly occupied/ completed units continues at a consistence rate with an additional 84 no. units completed in this quarter compared to 82 no. units in Q3 2019.
- **Northwood-Santry**: Construction continues to progress in three active sites. 134 no. units are under construction this quarter compared to 311 no. units in Q3 2019. However, the completion rate has increased with 189 no. units Newly Occupied in Q4 2019 compared to 161 no. units in Q3 2019.



Total No. of Sites with Planning Permission
0.7% increase
from 134 to 135



Total No. of Units with Planning Permission
3.4% increase
from 14,964 to 15,467



Total No. of Active Sites
6.3% increase
from 79 to 84



Total No. of Units Under Construction
13.3% decrease
from 2,192 to 2,527

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.

