Rialtas na hÉireann
Government of Ireland

Trends Analysis

Housing Assistance Payment (2014 - 2019)

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HOUSING, PLANNING AND LOCAL GOVERNMENT VOTE

DEPARTMENT OF PUBLIC EXPENDITURE & REFORM

OCTOBER 2019

IGEES
Irish Government Economic and Evaluation Service

Executive Summary

The Housing Assistance Payment (HAP) is a current expenditure funded social housing support tasked with providing almost 84,000 tenancies over the lifetime of Rebuilding Ireland (2016-2021). HAP facilitates the payment of rent by a Local Authority (LA) to private rental sector (PRS) landlords, to accommodate households that qualify for social housing, up to a certain threshold of rent in the relevant LA. **The HAP scheme is an integral component of the Rebuilding Ireland strategy, providing speedy responses to urgent social housing need while LAs have increased the stock of social housing available to them with increased capital allocations from the Exchequer.** HAP has been operational since 2014 and has been available nationally since March 2017. The Homeless HAP (HHAP) Place Finder service has been providing an essential solution in reducing the incidence of homelessness, particularly in the Dublin LAs since the start of 2018. By the end of Quarter 2 in 2019, a total of 62,739 tenancies had been created since the scheme began, with 48,261 households being supported through active tenancies, net of 14,478 exits (23%) from the scheme.

Key Findings

- **Net Exchequer expenditure on HAP has increased significantly since its introduction, from €0.4m in 2014 to €276m in 2018. Profiled expenditure for 2019 in the Revised Estimates for Public Services is €423m. HHAP expenditure (€137m to date) is an increasing proportion (20%) of overall HAP expenditure, reflecting increases in exits from emergency accommodation.**
- Average landlord payment for HAP tenancies, by all LAs and household types (€829 in Q.2 2019) is lower than national average market rents (€1,202 as per RTB Rent Index Q.2 2019). **However, the use of discretionary additional payments by LAs, above statutory HAP limits is increasing; from 12.6% of active tenancies in 2016 to 40% of active tenancies by end of Q.2 2019, which indicates that the Exchequer is exposed to rising PRS rents.** Use of discretion can be up to 20% more than rent limits for HAP and 50% for HHAP tenancies for Dublin LAs. Average unit cost of discretion across all LAs and household types has increased (56%) from €127 at the end of 2016 to €198 by 2019.
- For 72% of all HAP tenancies, the landlord payment (inclusive of any discretionary increases) was covering the full rent. This infers that for 28% of tenancies, **voluntary top-up payments by HAP tenants, in addition to differential rent obligations, are contributing to the total rent received by landlords. More research is required here in order to assess any potential wider rental market impacts.**
- Average differential weekly rent (HAP tenant contribution) increased from €41.43 at the end of 2016 to €48.42 by 2019. Increases in differential rent are linked to tenant income rather than increases in rental costs. **It is important that regular reviews of HAP tenant income are conducted by LAs to ensure appropriate tenant contributions and for the overall financial sustainability of HAP.**
- In the period of 2016-2018, there were 47,917 new HAP tenancies set-up nationally. This accounts for 67% of all social housing units provided in this period (72,049). **Over 50% (24,213) were concentrated in 8 LAs including Dublin City, Cork City, Cork County, South County Dublin, Louth, Tipperary, Kildare and Meath. However, the level of reliance on HAP varies across LAs. For example, in Fingal, less than 50% of overall social housing delivery is provided through HAP, compared to 80% of delivery in Louth.**
- **Single (individual) recipients account for 23% of all HAP tenancies by Q.2 2019.** This is a decrease from 28% in 2016. Taken together, single, single +1, and single +2 households account for 61% of all active tenancies in 2018, a small increase in the same pattern of support from 59% in 2016. The accords with the pattern of households supported in all social housing and is reflective of overall demand.
- **3,304 or 23% of 14,478 closed HAP tenancies exited the scheme in 2019 by transferring to a LA or Approved Housing Body dwelling.** This proportion has increased over the course of Rebuilding Ireland, from 240 or 14% of 1,737 total exits at the end of 2016.
- By end Q.2 2019, 3,685 or 25% of exits were voluntary, and a further 958 (7%) were due to non-payment of rent by the HAP tenants.

1. Introduction

Context for Analysis

The Housing Assistance Payment (HAP) is a social housing support which provides access to accommodation within the Private Rental Sector (PRS). HAP was approved by Government on 18th July 2013. Under the scheme, which was introduced on a phased basis across Local Authorities (LA) from 2014, recipients are responsible for sourcing their own accommodation within the PRS. The scheme aims to bring all long-term social housing support provided by the State together under the Local Authority system. Net Exchequer expenditure or official out-turn on HAP (2014-2018) amounts to €503m.

HAP also has a number of other objectives including the removal of a potential barrier to employment by allowing recipients to remain in the scheme if they gain full-time employment; provision of a better integrated and more streamlined service and better regulation of the PRS. It is also envisaged that long term recipients of Rent Supplement (longer than 18 months) will transfer to the HAP scheme on a phased basis. It is important to note at the outset that the roll-out of the HAP scheme has been on a phased basis and only commenced for all Dublin LAs in March 2017 and was not fully completed until March 2018. Homeless HAP (HHAP) has been available in all Dublin LAs since 2014.

To further assist homeless households in exiting emergency accommodation, the establishment of a HHAP Place Finder Service was made available to each of the 31 LAs in January 2018. The HAP Place Finder Service has been successfully utilised by the Dublin Regional Homeless Executive (DRHE) across the Dublin LAs since February 2015. According to the Department of Housing, more than 4,900 households having been supported by the HHAP scheme up to the end of Q4, 2018.

Table 1: Overview of HAP Implementation (2014-2021)

Year	Target	New Tenancies (Inc. Rent Supplement Transfers)	RS Transfers	Local Authority Roll-Out	Social Housing Waiting List
2014	n/a	485	n/a	7	89,662**
2015	8,400	5,680	2,100*	18	89,662
2016	12,000	12,075	3,661	28	91,600
2017	15,000	17,916	4,131	31	85,799
2018	17,000	17,926	3,329	31	71,858
2019	16,760				
2020	13,000				
2021	10,000				

*2014 and 2015 combined

**Assessment of social housing need from 2013

Source: DHPLG

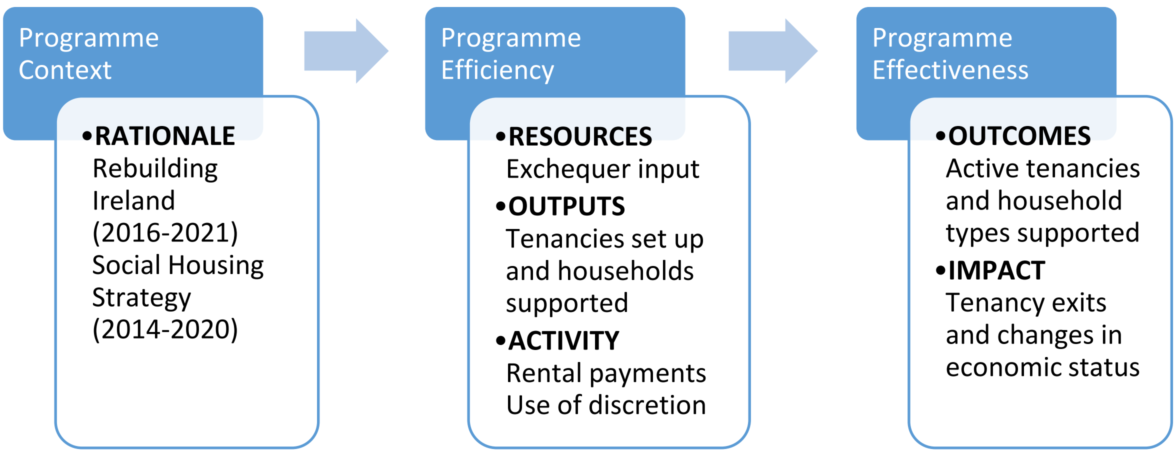
Objectives

This trends analysis paper aims to provide a high level overview of HAP implementation since 2014, its continued rationale, financial efficiency and overall effectiveness in terms of the households supported and their economic status. The paper collates information available to the Department of Public Expenditure and Reform (DPER) on Exchequer investment on the HAP scheme from 2014-2019 across LAs, tenancies supported and the broad impact of the scheme on benefiting households. Data has also been provided by the HAP Shared Services Centre in Limerick City and County Council, which has provided an important centralised role in implementing HAP since 2014.

This is not a comprehensive focussed policy assessment of the HAP scheme, as there are other areas of research needed, including wider market impacts that have not been assessed due to data and time constraints. It is envisaged further research on this will follow. The analysis however builds on other work carried out by DPER in the area of social housing expenditure and impacts. The terms of reference for this analysis focus on **the financially efficient and sustainable operation of the scheme, and overall effectiveness in terms of the households supported.** Terms of reference are;

1. Describe the evolution of the HAP subsidy and situate the ongoing implementation of the scheme in terms of policy objectives and the wider housing market.
2. Using the Public Spending Code 'Programme Logic Model' rubric, assess the implementation of HAP in terms of expenditure, new and existing tenancies, households supported, and impacts such as change/improvement in economic status.
3. Provide analysis and conclusions on the financial efficiency of the scheme, having due regard to the substantial budget associated with the continued implementation of HAP and signpost further areas for research and analysis, as appropriate.

Figure 1: Public Spending Code – Programme Logic Model Framework for Analysis



2. Rationale

Social Housing Policy

The overall rationale for the provision of social housing support is clear. Housing is a basic requirement, but the market, left to its own devices, may not ensure that all households are appropriately housed in an affordable and sustainable manner. Research by the National Economic and Social Council (NESC) has identified that “around one-quarter to one-third of the population will not find satisfactory housing through the market alone”[1]. This is the main reason why a social housing programme exists. Where there is inadequate supply of housing generally, rising rents can drive low income households out of the private market to seek assistance from the State for their housing requirements.

There is an onus on Government to address the particular and often complex social housing needs of those who require it with a social housing solution that is efficient and appropriate, as well as providing value for money in the long term. Ahead of the introduction of the HAP scheme, the statutory assessment of social housing need in 2013 identified that there were almost 90,000 households on LA waiting lists. In July 2014, there were 3,358 people homeless. (2,509 adults + 849 children). There are currently 10,253 homeless persons (6,504 adults + 3,749 children). There were 71,858 households on local authority waiting lists as at 11 June 2018. It has been indicated there has been a 5% reduction on this waiting list figure in 2019[2].

HAP Policy Evolution

The Social Housing Strategy (SHS) 2020, published by Government in November 2014, envisaged the delivery of social housing supports provided through the private rental sector and that the new Housing Assistance Payment scheme “will have scope to provide accommodation for up to 75,000 households, many of whom are currently in receipt of Rent Supplement on a long-term basis. These households will transition to housing support in a tenancy supported by a payment from the local authority.” The SHS was superseded by the publication of the Rebuilding Ireland Action Plan for Housing and Homelessness in July 2016. HAP is a key delivery mechanism for the provision of social housing support under the Rebuilding Ireland, and aims to support just under 84,000 households over the lifetime of the plan (2016-2021).

Rebuilding Ireland HAP Targets & Output

Rebuilding Ireland is modelled on blended delivery across the main programmes of build, acquisition, leasing, HAP and the Rental Accommodation Scheme (RAS). **This blended delivery approach is vital**

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[1] NESC, 2014 ‘Social Housing at the Crossroads: Possibilities for Investment, Provision and Cost Rental’

[2] Rebuilding Ireland Q.2 2019 Social Housing Output and Construction Status Report

to achieving the delivery targets set. Under Rebuilding Ireland, a commitment was made to the delivery of 137,000 social housing supports across all delivery mechanisms, which includes 87,000 units (64%) under HAP and RAS over the 6 year period. RAS, like HAP, is a private market rental subsidy but tenancies are normally of a longer duration (5-10 years). A critical focus of Rebuilding Ireland is to intensify the provision of long term LA and AHB stock, particularly to accelerate LA and AHB new build activity. However, there is an urgent and immediate need to accommodate households, which cannot be met solely from LA and AHB owned stock provision.

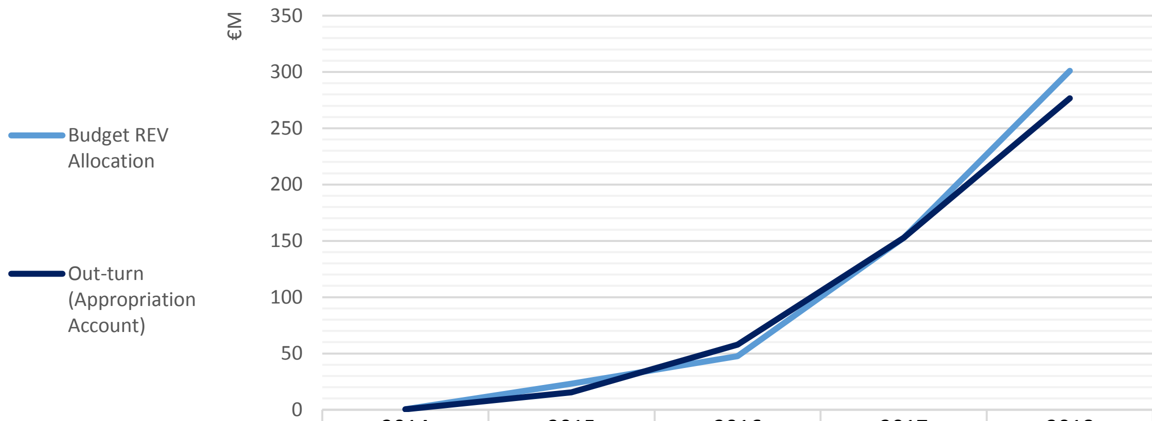
At the end of the Rebuilding Ireland programme, the aim is to have reached a point where build, acquisition and leasing programmes will be delivering more than HAP and RAS annually, as part of the process to deliver a sustainable and balanced supply of social and affordable housing.

3. HAP Expenditure (Resources)

Overview

The level of Exchequer funding, through yearly budget allocations for HAP has increased significantly from €0.5m in 2015 to €423m in 2019. Official outturn for the HAP scheme over the five years of implementation amounts to €503m. Landlord payments by the HAP Shared Services Centre was €612m (which is then partially offset by differential rent payments collected from HAP tenants). At the end of Q.2 2019, the preliminary out-turn for HAP was just over €178m, or 42% of the Revised Estimates (REV) profile of €423m. As in 2018, it is anticipated that out-turn on HAP may be below budget allocation again in 2019.

Figure 2: Budget allocation and outturn on HAP (2014-2018)

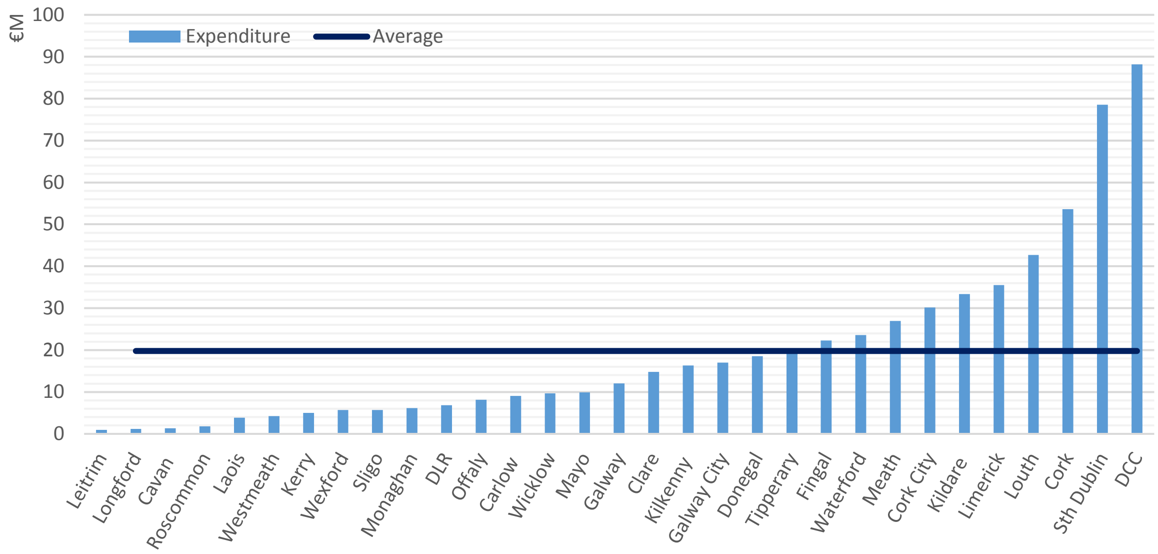


	2014	2015	2016	2017	2018
Budget REV Allocation	0.5	23.2	47.7	152.7	301
Out-turn (Appropriation Account)	0.4	15.6	57.7	152.7	276.6

Source: DHPLG/HAP Shared Services Centre

Expenditure by LAs across the 5 years varies as a result of the multi-annual phased roll out of the scheme and the demand for social housing in each area. In order to assess the level of Exchequer funding of the scheme regionally, landlord payment data from the HAP Shared Services Centre (HAP SSC) is used to compare the level investment across LAs. **It is important to note here that landlord payment data will be higher than net out-turn as it is offset by differential rent collected from tenants by the HAP SSC**. Figure 3 demonstrates that the highest expenditure on HAP is in Dublin City Council; €88m (14%), South County Dublin €79m (13%) and Cork County (9%). The four Dublin LAs account for €196m or 32% of total national expenditure on HAP from 2014 to 2018. **It is important to note the level of HAP expenditure is affected by the phased rollout across LAs and how quickly they are meeting the demand for social housing in those LAs.**

Figure 3: Cumulative HAP Expenditure on Landlord Payments by LA (2014-2018)



Source: DHPLG/HAP Shared Services Centre

HAP Expenditure 2014-2015

HAP has been rolled out on a phased basis since September 2014, with 7 LAs delivering the scheme initially and 11 more LAs added in 2015. Expenditure incurred by the first wave of 7 LAs is set out in Table 2 below. The bulk of the pilot spend, €375,000 or 84% was in the Limerick City and Council area, where the HAP Shared Services Centre was set up. At the end of 2014, there were 485 tenancies supported. Further analysis of tenancies across LAs, and the types of household supported is provided in Section 3.

Table 2: HAP Expenditure 2014 (Landlord Payments)

	Expenditure €	Tenancies	LA	Expenditure €	Tenancies
Limerick	374,000	210	Waterford	7,000	39
Cork County	24,000	66	Monaghan	3,000	17
Kilkenny	23,000	104	South Dublin	1,000	8
Louth	11,000	41	**Total**	**446,000**	**485**

Source: DHPLG

In 2015, the HAP scheme was rolled out to a further 11 LAs by year end, with a considerable increase of expenditure to over €15m. The largest expenditure across the two years was in major urban areas; in excess of €3m in Limerick, and €2m in Cork County and South County Dublin. At the end of 2015, there were 6,165 tenancies supported under HAP. It is important to note that while HAP was not rolled out generally across all Dublin LAs until 2017, HHAP was available in all Dublin LAs during this time.

Table 3: HAP Expenditure 2015 (Landlord Payments)

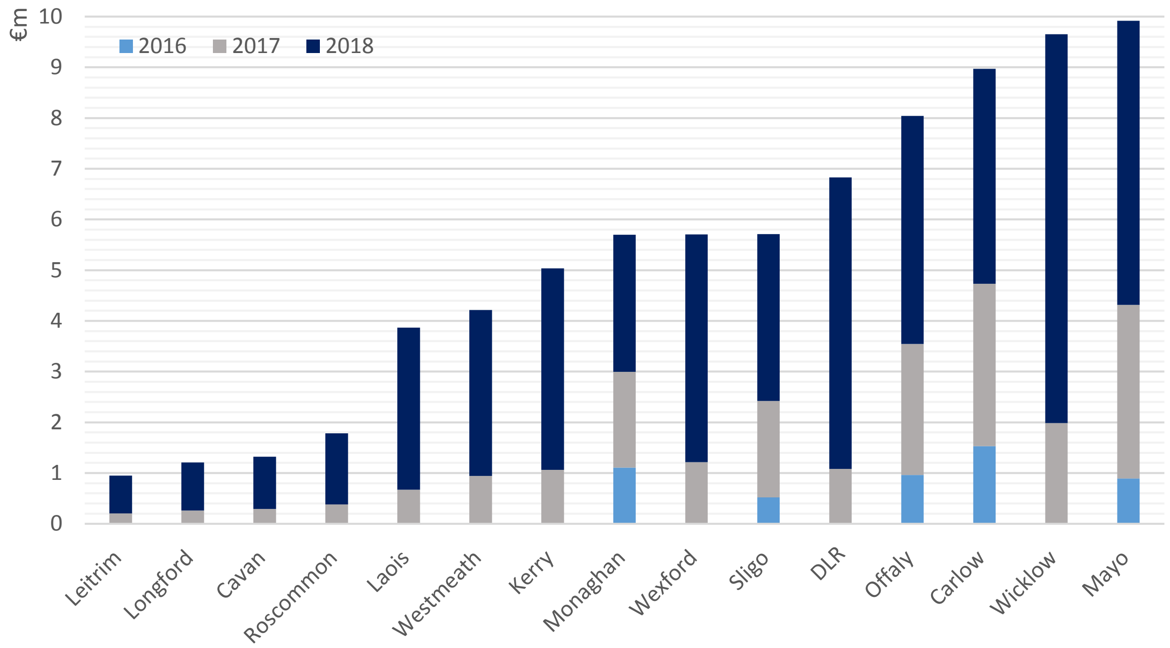
	Expenditure €000	Tenancies		Expenditure €000	Tenancies
Limerick	3,178	1,120	Cork City	123	114
Cork County	2,929	953	Offaly	77	98
South Dublin	2,459	566	Carlow	74	106
Kilkenny	1,903	570	Fingal	33	7
Louth	1,780	678	Kildare	11	32
Waterford	1,547	682	Meath	6	14
Monaghan	427	199	DLR	5	1
Donegal	331	499	Sligo	1	9
DCC	179	52	Mayo	1	18
Tipperary	178	178	Galway County	1	7
Clare	169	246	**Total**	**15,411**	**6,165**

Source: DHPLG Statistics

HAP Expenditure 2016-2018

HAP became available in Galway City Council in March 2016 along with another nine LAs in December of that year including Cavan, Kerry, Laois, Leitrim, Longford, Roscommon, Westmeath, Wexford and Wicklow. The other three Dublin LAs, Fingal, DLR and DCC providing HAP commenced from 1 March 2017, with full roll out in the Dublin area completed by March 2018. Detailed information on the numbers of tenancies set up in this period across these LAs are discussed further on in the report, **however the total number of new tenancies set up had risen from 18,230 at the end of 2016 to 54,072 at the end of 2018.** For clarity of presentation, an analysis of expenditure is provided in Figure 4 for those LAs with cumulative expenditure of less than €10m over 2016 to 2018. **It is clear that in areas where demand for housing generally is lower, such as Leitrim, Longford, Cavan and Roscommon, cumulative expenditure on HAP has remained relatively low (<€2m).** This is in contrast to an area of higher demand for housing, such as Wicklow, where expenditure on HAP quickly increased from €2m in 2017 over €7.5m in 2018.

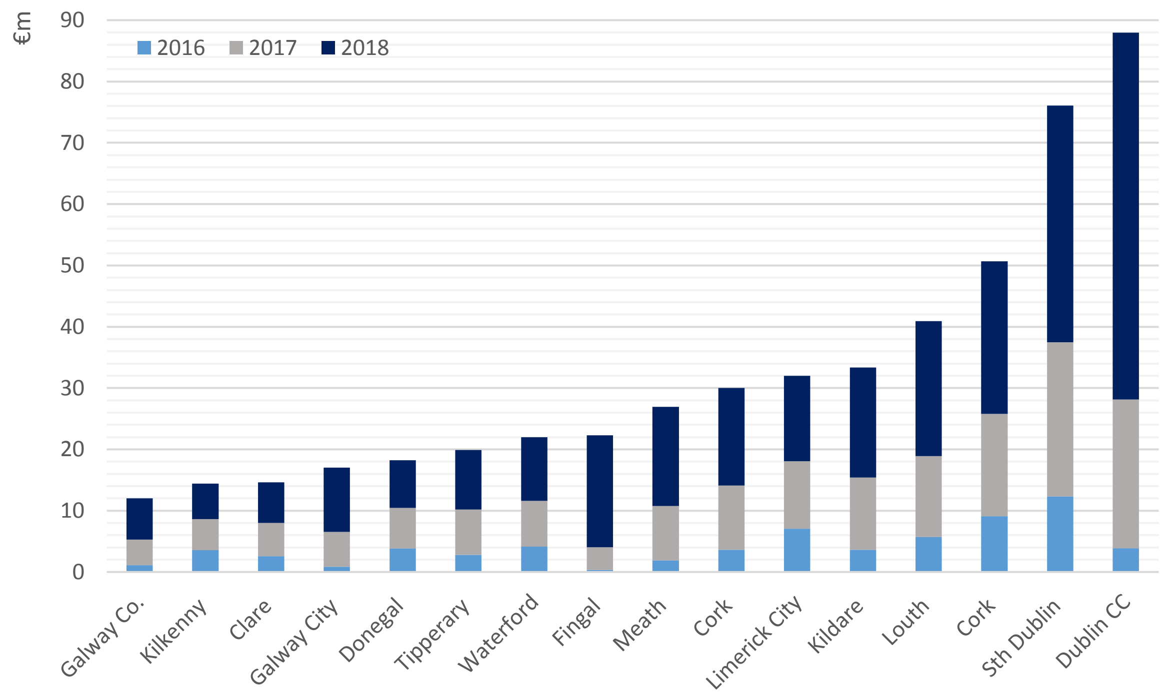
Figure 4: HAP Expenditure 2016-2018 by LA (<€10m Cumulatively)



Source: HAP SSC

As demonstrated in Figure 5 below, HAP Expenditure in more urban/suburban areas increased steadily over the course of 2016 to 2018. It is important however to note that expenditure on HAP tenancies in an area such as South County Dublin will include the ongoing cost of tenancies set up in 2014 and 2015, while another LA such as Fingal, only rolled out in 2017, will have costs from that point onward.

Figure 5: HAP Expenditure 2016-2018 by LA (>€10m Cumulatively)



Source: HAP SSC

Homeless HAP

As part of the range of actions under Rebuilding Ireland, the Dublin Regional Homeless Executive (DRHE) began operating a specific Homeless HAP (HHAP) scheme in the Dublin region for homeless households in December 2014, with an additional support, the Place Finder Service, becoming operational in Dublin in February 2015. A similar service began operating in Cork City in 2017 and, in January 2018, the Place Finder Service was rolled out nationally. This HHAP scheme provides additional financial and related supports to tenants and landlords, along with all of the benefits of the national HAP scheme. The Place Finder Service has been successfully utilised by the Dublin Regional Homeless Executive (DRHE) across the Dublin local authorities since February 2015, with more than 4,900 households having been supported by the HHAP scheme up to the end of Q4, 2018. Nationally, over 6,100 households had been supported under the scheme by end Q4, 2018. HHAP eligibility is determined by the relevant local authority, and the scheme increases the level of support available by providing a targeted support for homeless households, or those at risk of homelessness, who are finding it difficult to secure a HAP tenancy. HHAP applications are prioritised and the Place Finder often assists in the location of a suitable property. Also, the LA can pay the deposit and up to 2 month's rent in advance to the landlord on the recipient's behalf.

In general, local authorities may use their discretion and depart from the local HAP rent limit by up to 20%; however this flexibility has been increased to 50% for HHAP in the Dublin Region. An analysis of discretion is provided in Section 5 on HAP Efficiency. Table 3 below demonstrates that HHAP tenancies are an increasing proportion of total out-turn on HAP. Overall expenditure on HHAP over the period of Rebuilding Ireland amounts to €137.25m. According to DHPLG, **in the first six months of 2019, an estimated 67%[3] of exits from homelessness were to HAP tenancies. The proportion of overall HAP expenditure on HHAP is rising continuously, reflecting increased exits from emergency accommodation**

Table 4: Expenditure on Homeless HAP (2016-Q.2. 2019)

	2016	2017	2018	2019 (Q.2)	Total
HHAP Expenditure (€m)	5.4	26.2	59.9	45.7*	137.2
% of Total HAP Out-turn	9%	17%	22%	26%	20%

*Unofficial out-turn

Source: DHPLG

[3] Exits include both exits from emergency accommodation and persons who have been assessed as homeless but have not entered emergency accommodation e.g. HAP preventions through homeless HAP

4. HAP Tenancies (Outputs)

New Tenancies

A household in receipt of HAP is no longer included on the LA waiting list for social housing. A key difference between a HAP tenancy and a LA tenancy is that if a HAP tenancy comes to an end for whatever reason, the onus is upon the household to source a new HAP tenancy. However, HAP households can still register their interest for an allocated social housing solution, provided by the LA or an AHB, by applying to go on their LA transfer list. The number of HAP tenancies established has almost trebled over the first three years of Rebuilding Ireland, rising from 18,230 in 2016 to 54,072 by the end of 2018. **It is important to note that there is a distinction between the number of tenancies set-up in a particular year and number of active tenancies by year end, net of any exits from the scheme in a particular year**.

Table 5: HAP Tenancies Set-up and Active (2014-2019)

	2014/2015	2016	2017	2018	Q.2 2019
Set-up (Cumulative)	**6,165**	**18,230**	**36,146**	**54,072**	**62,739**
Set-up (Per Year)	5,680	12,075	17,916	17,926	8,667
RS Transfers	2,100	3,661	4,131	3,329	367
% RS Of Set-Up (P.Y)	**37**	**33**	**23**	**19**	**4**
Exits (% of Set-up)		1,737 (10%)	4,918 (14%)	10,629 (20%)	14,478 (23%)
Active Tenancies	6,165	16,493	31,228	43,443	48,261

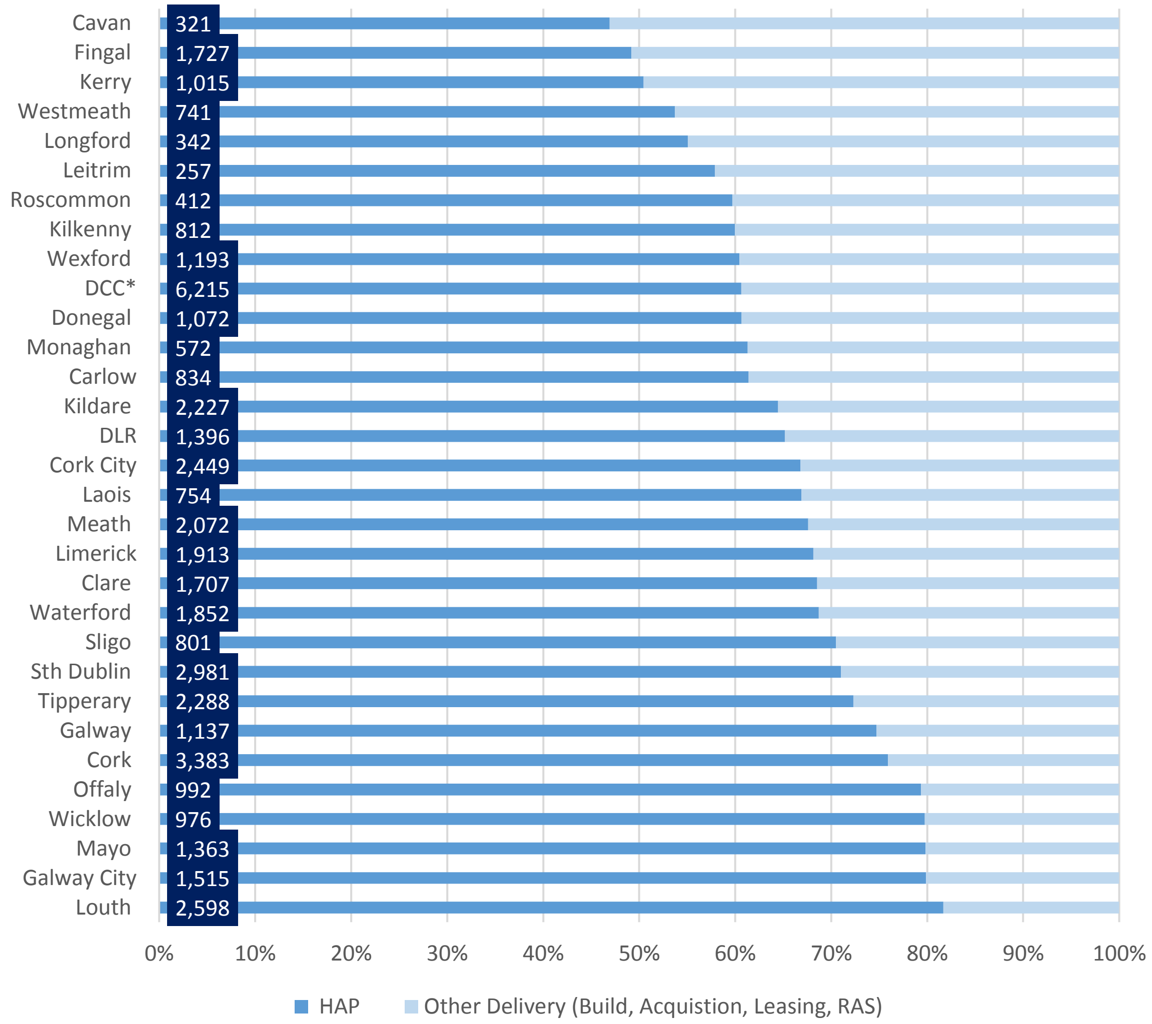
Source: DHPLG/HAP SSC

HAP Tenancies Set-Up by LA (2016-2018)

Over the first three years of Rebuilding Ireland, cumulative delivery of HAP tenancies amounted to 47,917 households. The distribution of these tenancies by LA is illustrated in Figure 6. This accounts for 67% of all social housing solutions provided under the action plan. However when yearly exits are considered, the net active tenancies recorded by end of Q.2. 2019 amounted to 48,261. While the largest number of HAP tenancies over this period (6,215) were set-up in Dublin City Council, the HAP subsidy accounts for less than 50% of social housing delivery in Fingal. It is important to reiterate that the DRHE coordinates the set-up of new HHAP tenancies for all of the four Dublin local authorities.

Overall, more than 50% of all tenancies set up (24,213) in this period were concentrated in eight local authority areas; DCC, Cork County, South Dublin, Cork City, Tipperary, Kildare and Meath.

Figure 6: Cumulative HAP Tenancies Set-up by LA as % of Rebuilding Ireland Output (2016-2018)



*DCC figure includes homeless HAP tenancies for all Dublin LAs through the DRHE

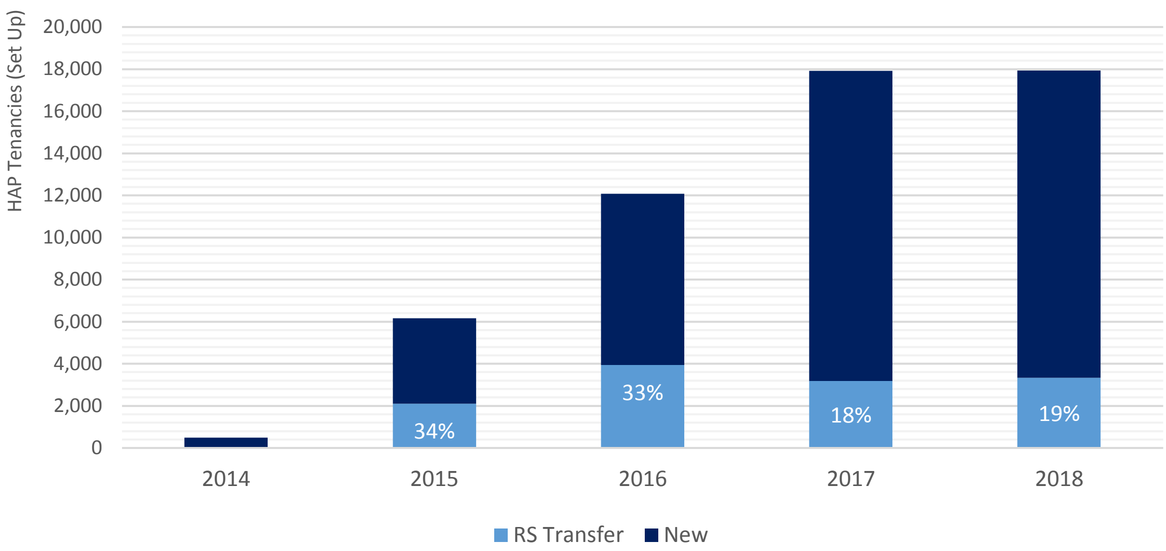
Source: DHPLG Statistics

Rent Supplement Transfers

An important difference between HAP and Rent Supplement is that it allows recipients to work full time while Rent Supplement (RS) cannot receive benefit if working for more than 30 hours per week. From a policy perspective, this is an important evolution as it incentivises those in receipt of the subsidy to return to work, improving their economic status. RS was introduced as a short term income support for accommodation but became a long-term housing support, for which it was never intended. The HAP scheme is designed to bring together all the social housing services provided by the State, with local authorities being responsible for all households with an established housing need, including those whose needs are currently being met through long-term RS.

At the end of Q4 2018, there were 54,072 HAP tenancies of which 13,221 households were direct RS transfers. Transfers were initially focussed on the Wave 1 and Wave 2 LAs, and since HAP was rolled out to all Dublin LAs from 2017, significant focus has been placed on implementing transfers across the region through partnership between the local Department of Employment Affairs & Social Protection staff and local authorities. A particular focus is on RS transfers to HAP in 2019, and it is targeted under Rebuilding Ireland that the majority of transfers will be complete by end 2020. As a certain number of short term RS tenancies will become longer term in the future, it is anticipated that there will continue to be an ongoing flow from RS to HAP post 2020, but at a smaller scale. It is important to note here that the true number of RS transfers may be understated as it captures "direct" transfers only. RS households may end a RS tenancy and take a break before commencing a HAP tenancy (which does not capture their previous RS status). **DHPLG are working with DEASP to ascertain if they can measure all households who were in RS between 2015 and 2019, and are now in HAP, for a more accurate reflection of RS transfers.**

Figure 7: Rent Supplement Transfers as % of All HAP Tenancies



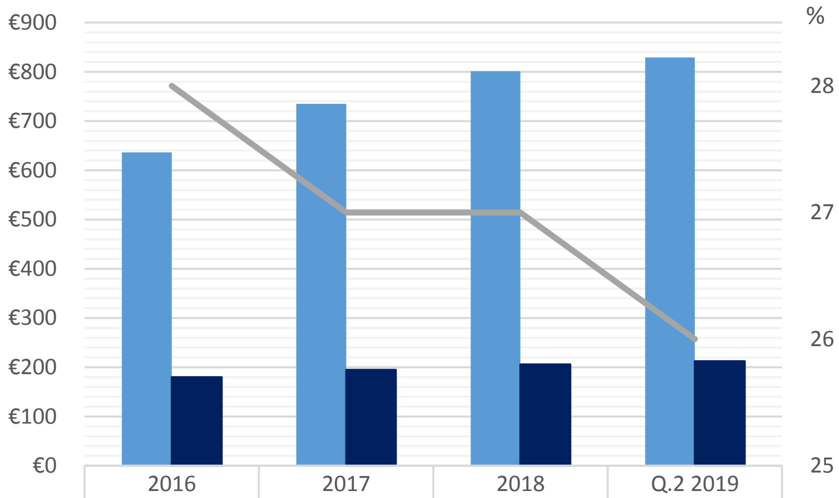
Source: DHPLG

5. HAP Efficiency

Rental Payments

Limerick City and County Council provide an efficient transactional shared service on behalf of all HAP local authorities. This HAP Shared Services Centre (SSC) manages all HAP related rental transactions for the tenant, local authority and landlord. **The DHPLG does not recoup individual local authorities in respect of HAP rental payments in their administrative areas but rather recoups all landlord costs via the HAP SSC**. The efficiency and sustainability of the HAP support is dependent on a number of other factors, including social housing tenants contributing progressively toward the full cost of the rental accommodation. A HAP tenancy agreement is between the landlord and the tenant. The rental payment to the landlord is made directly by LAs through the HAP SCC, however there is no contractual relationship between the LA and the landlord. The level of differential rent payment by the HAP household for the accommodation should generally be within the limits set down for the household type in that LA. Detailed information on LA rent limits and average differential rent levels are available in the appendices. Average differential rent across all LAs and household types increased from €41.43 at the end of 2016 to €48.42 by Q.2 2019. Increases in differential rent are linked to tenant income rather than increases in rental costs. **Differential rent increases should keep pace with increases in the incomes of the HAP recipients and there is a strong onus upon LAs to ensure regular rent reviews in this regard, to ensure the financial efficiency of the HAP scheme.**

Figure 8: Average Monthly Landlord Payments by LA and Differential Rent Payments[4]



	2016	2017	2018	Q.2 2019
Landlord Payment	€636	€735	€801	€829
Diff. Rent Payment	€180	€195	€206	€212
Diff. Rent % of LL Payment	28	27	27	26

Source: HAP SSC

There are a variety of differential rent schemes in operation across LAs and a review of the various mechanisms for calculating them is currently being finalised by the DPHLG and is due for publication shortly. See Appendix 4 for recent average differential rent payments across individual LAs. The average landlord payment across all LAs for all household types has increased 30% from €636 in 2016 to €829 in 2019. Variance in rental costs in areas of higher demand where HAP was rolled out in 2017 may explain the level of increase. **Monthly differential rent payments have only increased by 17% over the same period. It is important to note that rent prices are linked to wider market increases, while increases in differential rent will be limited by tenant's ability to pay.**

[4] Weekly payment data from HAP SSC is multiplied by 4.35 to estimate monthly tenant differential rent payments for comparison with landlord payments by LAs

Discretion & Top-ups

When Rebuilding Ireland was launched in July 2016, the rent limits for HAP were increased to reflect the increases in rental costs across various LAs, rising as much as 60% in some areas. Rent limits for all LAs are provided in Appendix 3. The Government also provided flexibility or discretion to LAs to agree to a HAP payment up to 20% above the maximum rent limit, in consideration of local rental market conditions. Flexibility of up to 50% is available for HHAP tenancies in the DRHE area. **Exchequer expenditure on discretion has increased from €0.25m in 2016 to €3.6m for the first half of 2019, indicating that the Exchequer is being exposed to rising PRS rents.** Average landlord payment for HAP tenancies, by all LAs and household types (€829 in 2019) is lower than national average market rents (€1,277 as per RTB Rent Index[5] Q.2 2019). The rate of use of discretionary additional payments by LAs, above statutory HAP limits is increasing; from 12.6% of active tenancies in 2016 to 40% of active tenancies by end of Q.2 2019. **According to the HAP SSC, for 72% of all existing HAP tenancies, the landlord payment (inclusive of any discretionary increases) was covering the full rent. This infers that for 28% of tenancies, voluntary top-up payments by HAP tenants, in addition to differential rent obligations, are contributing to the total rent received by landlords.** More research and analysis is required here in order to assess any potential wider rental market impacts. The number of local electoral areas that now come within the Rent Pressure Zones has increased and should have a dampening effect on rental cost inflation. This could assist in minimising the use of discretion to exceptional circumstances. **While the payment of voluntary top-ups by tenants does not fall within the scope of LAs to manage, it is important that the use of discretion is managed by the LAs and carefully applied as it could possibly contribute to inflation in the wider private rental sector.**

Table 6: Use of Discretion by LAs (2016 to 2019)

Use of Discretionary Rent Increase	No. households		% of HAP Tenancies	
Year	2016	Q.2 2019	2016	Q.2 2019
50% discretion	683	4,716	4.1%	9.9%
20% discretion	1,286	13,486	7.8%	28.3%
Non-standard households[6]	113	850	0.7%	1.8%
Total	**2,082**	**19,052**	**12.6%**	**40%**

Source: HAP SSC

[5] RTB Rent Index Q.2 2019

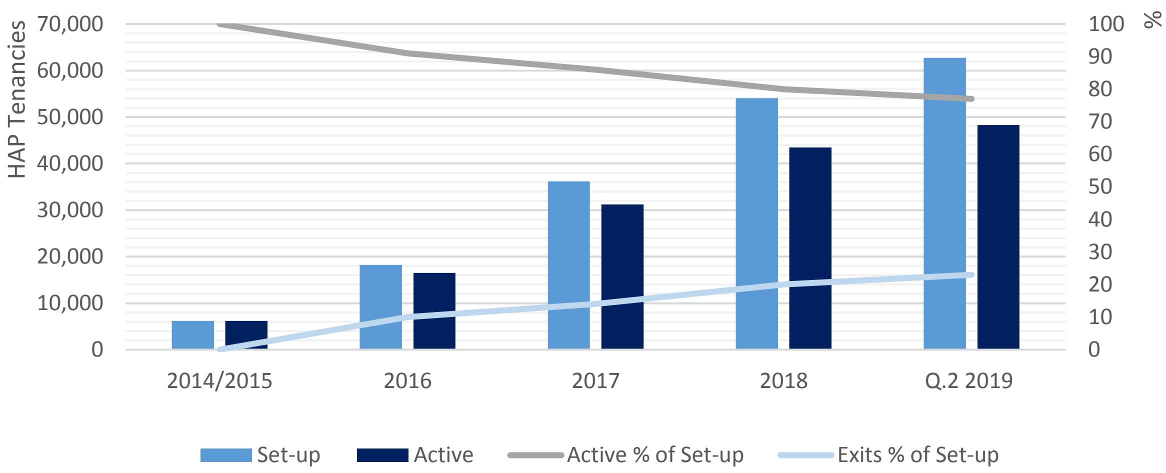
[6] Section 43(2)(a) of the Housing (Miscellaneous) Provisions Act 2014, empowers the Minister for Housing, Planning and Local Government (subject to the consent of the Minister for Public Expenditure) to prescribe via regulations the maximum amount of housing assistance payable for specified classes of qualified households.

6. HAP Effectiveness (Outcomes)

Active Tenancies

An important aspect of the sustainability and effectiveness of any subsidy is that it provides sufficient assistance to those in need, without being a deadweight support. Figure 9 below illustrates the number of active tenancies, net of any tenancy closures and exits from the HAP scheme. In line with DHPLG expectations, the number of active tenancies is gradually decreasing over time as a percentage of tenancies set-up under the scheme. Cumulative exits are also increasing. 3,304 exits or 23% of 14,478 in total are a result of transfers to LA or AHB managed dwellings. This is in keeping with policy on HAP and transfer lists, acknowledging and supporting households who express a desire for an allocated dwelling. **As LA and AHB stock levels increase as a result of the parallel Rebuilding Ireland build, acquisition and lease delivery, allocations from transfer lists are increasing. This should contribute to the effectiveness and sustainability of the HAP scheme.**

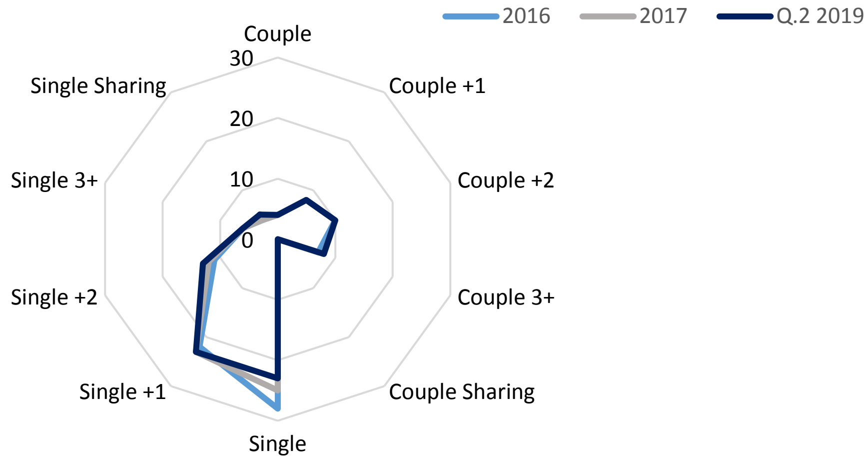
Figure 9: New Tenancies, Active Tenancies and Exited Tenancies



Source: HAP SSC

HAP supports a variety of household types ranging from single (individual) recipients of the subsidy to larger household types with children, living in either their own unit of housing or sharing with others. Figure 10 illustrates that, even accounting for the non-inclusion of all Dublin LAs until 2017, the pattern of household types for active HAP tenancies remains relatively constant since 2016 and accords with the profile of households supported across all social housing. Full details on the number of households supported over time are available in Appendix 1. **The key difference in terms of households supported is that the share of single households in receipt of HAP has reduced as a proportion from 28% in 2016 to 23% in 2019. Single, Single + 1 and Single + 2 households account for 59% of households supported in 2019 down 2% from the end of 2016.** This accords with demand for social housing generally.

Figure 10: % Household Type for Active HAP Tenancies (2016 -2019)

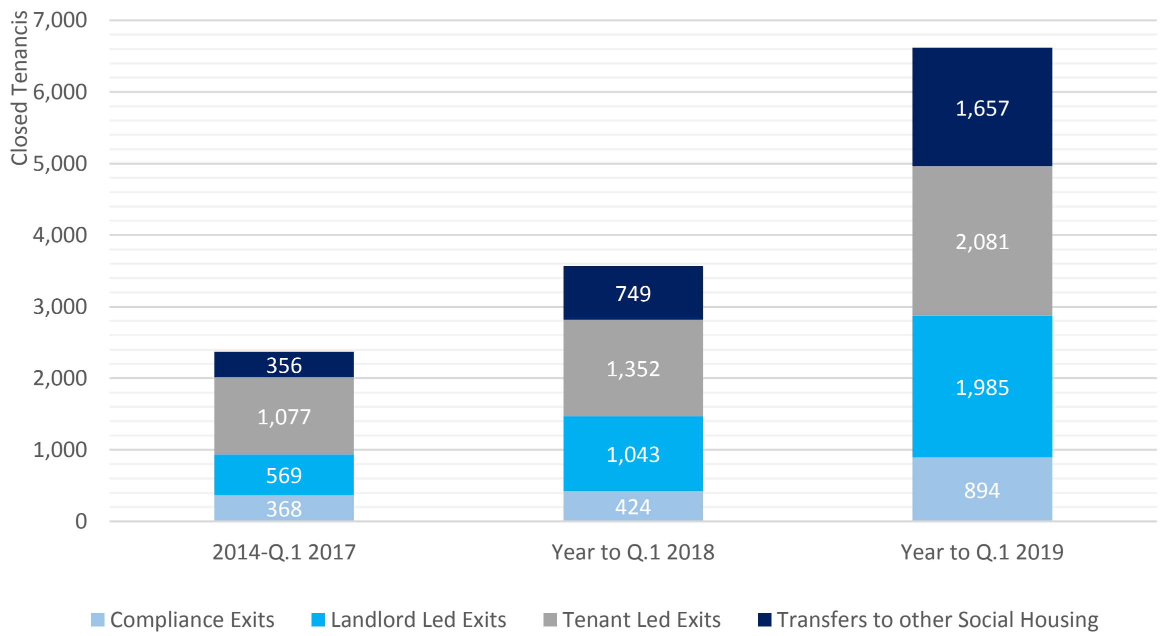


Source: HAP SSC

Closed Tenancies/Exits

The HAP SSC provide a quarterly analysis of closed tenancies and the reasons for their cessation. It is important to note that some exits may be either tenant or landlord led, or for compliance reasons. There may also be subsequent re-entry to the scheme by households with the commencement of follow on tenancies. Figure 11 demonstrates that exits have almost doubled between the start of 2018 and the start of 2019 and **there is a significant increase in the proportion of HAP exits as a result of moving to an alternative social housing solution such as a direct LA or AHB dwelling.**

Figure 11: Analysis of Closed Tenancies/Exits



Source: HAP SSC

The HAP SSC collates tenant declared reasons for the cessation of a HAP tenancy. As illustrated in Table 6, this information is currently grouped under headings such as; transfers to social housing, tenant led exits, landlord led exits and compliance led exits. As this data can provide important indications on the effectiveness of the HAP scheme, further analysis and possible reclassification of the self-reported reasons of why tenancies end would be welcome. For example, it is not clear why "tenant gave notice" is categorised as a compliance based exit rather than a tenant led exit.

Table 7: Self-Reported Reasons by Tenants for Cessation of a HAP Tenancy

Cumulative Exits @ End of Q.2 2019							**14,478**
Transfers to Social Housing							
Transferring to a Local Authority or Approved Housing Body owned dwelling							**3,304**
Tenant Led							
Voluntary	Medical	Education	Deceased Tenant	Work in Different Area	Family composition change	Differential Rent Increase	
3,685	412	60	255	186	274	105	**4,977**
Landlord Led							
Notice to tenant	Landlord Selling	Change in Landlord Agent payments		Landlord in Receivership	Landlord rent increase		
2,497	1,396	118		117	49		**4,177**
Compliance Based							
Non - payment of Rent	Movement within HAP after 2 years	Non Compliance in Tax Clearance	Tenant Gave Notice	Property Standards	Anti-Social Behaviour		
958	101	17	334	399	211		**2,020**

Source: HAP SSC

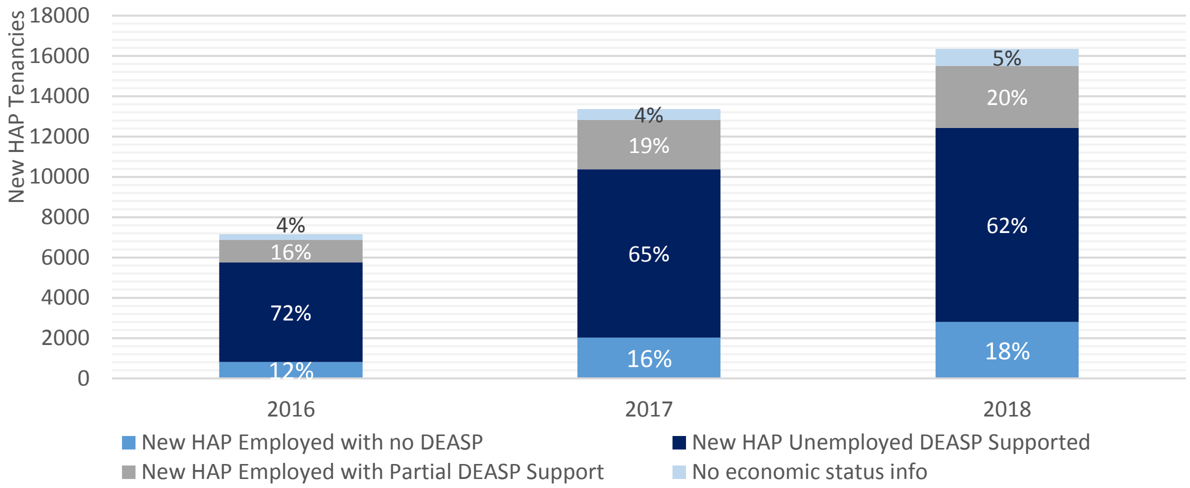
7. Economic Status (Impact)

Changes in Economic Status

One of the benefits of HAP is that it allows recipients to work full time, enhancing their economic status. As the scheme matures, it is important that HAP support does not act as a welfare trap, and allows people to improve their circumstances and income. Data from the HAP SSC as illustrated in Figure 12 would indicate that **the proportion of new HAP tenancies with no social welfare benefits is gradually increasing over time, while the proportion of new tenancies with an unemployed main**

applicant for the household is decreasing. This would broadly reflect a buoyant labour market. However, the numbers supported overall remain high. Note, there are a small portion of tenancies that have no economic status data recorded. Figures for tenancies are based off start date of the tenancy. The figures will not match back to official output reported under Rebuilding Ireland as these are primarily based on set-ups. The same applies for the RS transfer numbers in Figure 13.

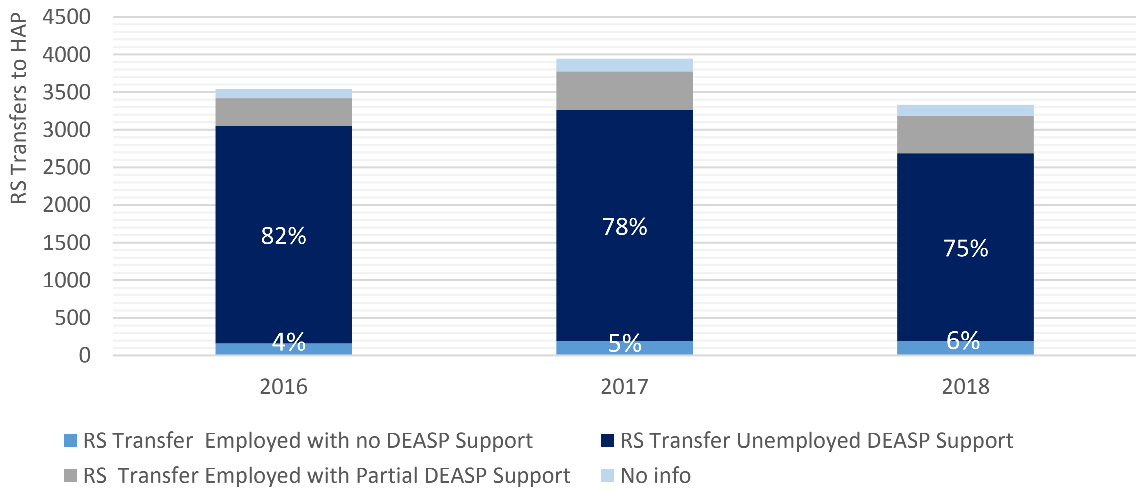
Figure 12: Economic Status of HAP Tenancies (New)



Source: HAP SSC

Furthermore, as demonstrated in Figure 14, **RS transfers over time that rely on DEASP support is decreasing, indicating that HAP may have a positive effect on their economic status.** However, individual unit tracking over time using a comprehensive data on all previous RS recipients would be required to more accurately analyse this. It may be helpful if relevant databases used for HAP tenancy registration capture whether a new HAP tenancy is a re-entry or previous RS tenancy.

Figure 13: Economic Status of HAP Tenancies (RS Transfers)



Source: HAP SSC

Self-Reported Income Changes

The HAP SSC provides quarterly information on amendments (reductions and increases) to differential rents that take place and whether it has a material change on the economic status of the lead applicant from the HAP household. The data is based on self-reported income changes, as opposed to LA led rent reviews. The analysis is categorised with regard to whether the level of income/hours now worked, move the household along the scale of being either unemployed (U), part-time (PT) employed [<30hrs] or full time (FT) employed [>=30hrs]. Table 7 provides a subset of information on self-reported income changes that have a net positive or negative impact on economic status. 495 tenancies that reported a positive change from part-time to full-time employment is a relatively small proportion (1.1%) of all active tenancies. **Available evidence would suggest that the HAP subsidy is assisting an improvement in economic status. Further analysis across all economic status categories is required to assess the ongoing impact.**

Table 8: Cumulative Self-Reported Income Changes as % of Active Tenancies 2016-2018

All LAs	No. of Income Changes (-)				No. of Income Changes (+)		
	PT -> U	**FT -> PT**	**FT -> U**		**U -> PT**	**U -> FT**	**PT -> FT**
2016	198	30	112		285	231	47
(-/+) Changes	340				563		
Active	16,498				16,498		
% of Active	2%				**3.4%**		
2017	623	82	417		910	775	122
(-/+) Changes	1,122				1,807		
Active	31,228				31,228		
% of Active	3.6%				**5.7%**		
2018	2327	280	1,662		3,131	2,847	495
(-/+) Changes	4,269				6,473		
Active	43,443				43,443		
% of Active	10%				**15%**		

A separate piece of analysis by DPER in 2018[7] on replacement rates acknowledged that the position of lone parents was complex due to the ability to earn income and receive maintenance while receiving One Parent Family Payment (OFP) and the interplay between social welfare payments, work incentives and the rollout of HAP as an in-work benefit. It recommended that further analysis be

[7] Boyle, C. 2018 Spending Review: Analysis of Replacement Rates

undertaken into this area and to examine the connection between these supports, and work incentives.

8. Wider Policy Issues

A recent joint research paper by Threshold and Society of St. Vincent de Paul[8] identified that, of a (limited) sample of HAP recipients surveyed, the majority (75%) of tenants were satisfied with HAP. Some respondents stated that, without HAP, they did not know how they would pay rent and afford other expenses. In some instances, respondents believed they would have been homeless otherwise.

Homelessness

The policy of accommodating those in need through the PRS has been an immediately effective response to addressing large social housing waiting lists and alleviating homelessness. It is arguable that the homelessness crisis and waiting lists would be much higher in the absence of the HAP support. The cost of alleviating homelessness through HHAP is also considerably less than emergency accommodation costs such as hotels and hostels. According to the Department of Housing, in 2017, the average cost of accommodating a family in a Dublin hotel was approximately €67,330[9] in 2017. This is compared with an average approximate cost of €15,000 for a HAP tenancy in Dublin.

Expenditure on Social Housing

Analysis by the DPER (2018)[10] also estimated that, the net present cost of delivering social housing units through HAP is higher than construction and/or acquisition in Fingal and Meath where prices within the general housing market are higher. As such, within the context of policy objectives and wider issues, **the relative cost of delivering social housing across LAs should be an important consideration in determining the mix of support mechanisms used, particularly in the medium to long run, as delivery of build, acquisition and lease is projected to increase.**

Wider Rental Market

Recent analysis of the rental market trends by the RTB has indicated that average rents are continuing to increase. The total number of households supported in the PRS since 2014 under HAP and RS remains fairly constant, however, as previously demonstrated by DPER (ibid), HAP and RS expenditure, as a percentage of all expenditure on housing, is now above peak RS spend in 2010. What may also be causing constraint, is the higher number of non-social housing households seeking rental properties, coupled with RTB Annual Report 2018[11] data demonstrating a reduction in the number of registered landlords. Further research in the area of rental market impact would be welcome.

[8] Threshold & Society of St. Vincent de Paul (2019) The Housing Assistance Payment (HAP): Making an Impact
[9] Provided by DHPLG Homeless Policy Unit
[10] O'Callaghan, D., Kilkenny, P. (2018) Current & Capital Expenditure on Social Housing Supports
[11] RTB Annual Report 2018

Ongoing social housing delivery

While meeting Rebuilding Ireland HAP targets are a measure of the policy's success, and people are moving from RS to HAP, enabling them to work, in a proper functioning housing market, this level of State intervention would not be targeted. As such, the Rebuilding Ireland HAP targets reduce in upcoming years, to reflect the levels of capital investment increasing supply through build, acquisition and lease. Local area costs and constraints will continue to be an important consideration for the cost effective use of HAP, to ensure sustainability and value for money in the blended delivery of social housing supports.

Future policy direction

Given the upward trend in private sector rents and the affordability issues arising, future policy considerations regarding cost rental should include exploration of measures targeted at those who find themselves in need of social housing supports in the short term but who may not require such supports in the longer term.

9. Conclusions

In addition to satisfying the objective of bringing all long-term social housing support provided by the State together under the Local Authority system, with social housing waiting lists at a record high over the period from 2011 to 2016, HAP became a fast and efficient tool in addressing the urgency of social housing requirements, through current expenditure supports. This was necessary, particularly given the dearth in capital budgets for LA social housing and consequential contraction of LA and AHB delivery for a period. The HAP scheme has greatly assisted in providing an immediate response to this additional demand, utilising available private market supply in the earlier years of implementation. However, in the context of wider housing supply constraints, associated rental inflation that has emerged in recent years, and the relative cost of HAP, particularly in areas of high demand, it is becoming important the proportion of new social housing stock increases in-line with projected Rebuilding Ireland targets to meet social housing requirements in a sustainable manner into the future.

- As capital expenditure allocations for new social housing stock also increases, it is anticipated that the level of new HAP tenancies will begin to taper, in line with targets and projections in Rebuilding Ireland.
- With a steadily increasing current expenditure allocation for HAP each year, it is vitally important that the cost of new tenancies are sustainable. Wider policy levers are important, and a progressive differential rent mechanism across local authority areas, with regular reviews, would be an important tool in reducing the net cost/Exchequer out-turn on HAP.

- Discretion by LAs should continue to be closely monitored, to ensure that it does not contribute to rental inflation locally. The number of local electoral areas that now come within the Rent Pressure Zones and its dampening effect on rental cost inflation should assist in minimising the use of discretion to exceptional circumstances.
- It is not clear to what extent voluntary top up payments by tenants could be contributing to wider rental market inflation.
- Further research would be welcome and encouraged across a number of areas as signalled through this analysis, in particular;
    - Accurate data with regard to rent supplement transfers
    - Wider rental market impacts
    - Detailed analysis of exits and tenancy cessations
    - Tracking information on income changes/in-work incentives

Quality Assurance & Acknowledgements

This report has been reviewed by a number of staff within the Department of Public Expenditure and Reform and the Department of Housing Planning & Local Government.

Quality Assurance Process

To ensure accuracy and methodological rigour, the author engaged in the following quality assurance process.

- **Internal/Departmental**
    - Senior Housing Vote Management
    - Peer Review (Central IGEES Unit)
- **External**
    - Other Government Department (Department of Housing, Planning & Local Government)
    - Summary findings presented at the Dublin Economics Workshop 2019

Appendix 1: Active HAP Tenancies by Household Type & Quarter (2017-2019)

Family Size/Type	Q.2 2019		Q.4 2018		Q.3 2018		Q.2 2018		Q.1 2018	
	%	No.	%	No.	%	No.	%	No.	%	No.
Single	4%	2001	24%	10253	24%	9729	24%	9192	25%	8581
Single +1	8%	3966	23%	9884	23%	9266	22%	8484	23%	7825
Single +2	10%	5040	12%	5392	12%	5066	12%	4667	12%	4273
Single 3+	8%	3763	6%	2564	6%	2392	6%	2158	6%	1995
Single Sharing	0%	100	4%	1919	4%	1790	4%	1647	4%	1481
Couple	23%	11082	4%	1812	4%	1709	4%	1552	4%	1436
Couple +1	23%	11124	8%	3624	8%	3414	8%	3160	8%	2899
Couple +2	13%	6147	10%	4535	10%	4238	10%	3911	10%	3553
Couple 3+	6%	2838	8%	3388	8%	3169	8%	2920	8%	2669
Couple Shared	5%	2200	0%	72	0%	64	0%	60	0%	52
Total	**100%**	**48,261**	**100%**	**43,443**	**100%**	**40,837**	**100%**	**37,751**	**100%**	**34,764**
	Q.1 2019		Q.4 2017		Q.3 2017		Q.2 2017		Q.1 2017	
Single	4%	1918	25%	7834	26%	7202	27%	6351	27%	5466
Single +1	8%	3782	23%	7028	22%	6126	22%	5252	22%	4360
Single +2	10%	4797	12%	3805	12%	3293	12%	2831	12%	2327
Single 3+	8%	3591	6%	1818	6%	1573	6%	1374	6%	1140
Single Sharing	0%	84	4%	1275	4%	1074	4%	944	4%	789
Couple	23%	10658	4%	1276	4%	1158	4%	981	4%	794
Couple +1	23%	10526	8%	2586	8%	2270	8%	1926	8%	1613
Couple +2	13%	5799	10%	3171	10%	2747	10%	2335	10%	1940
Couple 3+	6%	2704	8%	2389	8%	2135	8%	1815	8%	1516
Couple Shared	4%	2056	0%	46	0%	40	0%	34	0%	25
Total	**100%**	**45,915**	**100%**	**31,228**	**100%**	**27,618**	**100%**	**23,843**	**100%**	**19,970**

Source: DHPLG

Appendix 2 – Average Monthly Landlord Payment by Local Authority and Household Type @ 30 June 2019

Local Authority / Household Type	Single	Single +1	Single +2	Single 3+	Single Sharing	Couple	Couple +1	Couple +2	Couple 3+	Couple Sharing	Avg. Payment
Carlow County Council	€456	€98	€618	€677	€299	€530	€599	€621	€664	€290	€555
Cavan County Council	€391	€480	€482	€531	€410	€433	€448	€495	€588		€456
Clare County Council	€384	€505	€542	€579	€250	€432	€504	€553	€608	€264	€467
Cork City Council	€574	€904	€956	€1,038	€333	€705	€910	€948	€1,023	€390	€791
Cork County Council	€539	€829	€854	€893	€310	€643	€827	€856	€881	€503	€732
Donegal County Council	€333	€404	€459	€501	€194	€364	€406	€459	€502		€395
Dublin City Council	€847	€1,483	€1,539	€1,576	€520	€1,081	€1,412	€1,456	€1,564	€553	€1,292
Dun Laoghaire Rathdown County Council	€790	€1,524	€1,547	€1,711	€542	€1,052	€1,526	€1,511	€1,566	€896	€1,357
Fingal County Council	€833	€1,395	€1,444	€1,505	€523	€1,060	€1,361	€1,395	€1,509	€564	€1,348
Galway City Council	€596	€905	€958	€866	€357	€734	€908	€952	€1,000	€425	€813
Galway County Council	€577	€772	€812	€848	€308	€642	€745	€813	€826		€717
Kerry County Council	€413	€564	€577	€631	€231	€446	€555	€577	€611		€517
Kildare County Council	€626	€957	€1,021	€1,083	€377	€796	€978	€1,042	€1,104	€476	€923
Kilkenny County Council	€475	€618	€666	€729	€240	€517	€629	€651	€683	€335	€583
Laois County Council	€449	€632	€674	€725	€287	€475	€621	€673	€703	€441	€589
Leitrim County Council	€346	€448	€486	€508	€200	€372	€469	€472	€496		€416
Limerick City & County Council	€422	€639	€697	€732	€270	€466	€636	€684	€750	€272	€589
Longford County Council	€345	€454	€443	€533	€180	€368	€429	€442	€450		€412
Louth County Council	€594	€934	€1,003	€1,037	€328	€674	€924	€978	€1,048	€350	€860
Mayo County Council	€445	€550	€590	€611	€240	€485	€550	€579	€625		€510
Meath County Council	€624	€979	€1,077	€1,157	€368	€805	€1,005	€1,1032	€1,168	€525	€936
Monaghan County Council	€365	€557	€557	€588	€247	€460	€562	€576	€649	€249	€498
Offaly County Council	€393	€576	€609	€644	€249	€460	€573	€601	€612	€409	€520
Roscommon County Council	€373	€491	€542	€592	€250	€446	€506	€541	€567		€461
Sligo County Council	€447	€545	€564	€589	€218	€486	€535	€569	€587		€509
South Dublin County Council	€801	€1,325	€1,356	€1,400	€475	€943	€1,273	€1,304	€1,343	€540	€1,245
Tipperary County Council	€401	€537	€568	€605	€225	€441	€532	€564	€600	€253	€495
Waterford City & County Council	€442	€562	€586	€637	€244	€468	€560	€587	€637	€240	€517
Westmeath County Council	€471	€617	€642	€683	€267	€498	€611	€628	€651	€555	€560
Wexford County Council	€443	€554	€608	€652	€294	€486	€575	€593	€635		€529
Wicklow County Council	€663	€1,077	€1,132	€1,215	€405	€887	€1,068	€1,122	€1,211		€1,001
Average Monthly Landlord Payment by Household	**€525**	**€949**	**€981**	**€982**	**€374**	**€685**	**€943**	**€940**	**€1,031**	**€478**	**€829**

Source: HAP SSC

Appendix 3 - Rent Limits for Housing Assistance Payment

Local Authority Administrative Area	Single	Single Shared	Couple	Couple Shared	One Adult/Couple with 1 child	One Adult/Couple with 2 children	One Adult/Couple with 3 children
Carlow County Council	€440	€270	€510	€290	€570	€600	€630
Cavan County Council	€380	€190	€420	€220	€450	€470	€490
Clare County Council	€360	€220	€400	€240	€480	€515	€550
Cork City Council	€550	€300	€650	€330	€900	€925	€950
Cork County Council	€550	€300	€650	€330	€900	€925	€950
Donegal County Council	€340	€200	€370	€230	€410	€470	€520
Dublin City Council	€660	€430	€900	€500	€1,250	€1,275	€1,300
Dun Laoghaire-Rathdown County Council	€660	€430	€900	€500	€1,250	€1,275	€1,300
Fingal County Council	€660	€400	€900	€440	€1,150	€1,175	€1,200
Galway City Council	€575	€330	€650	€360	€850	€875	€900
Galway County Council	€575	€330	€650	€360	€850	€875	€900
Kerry County Council	€380	€200	€410	€230	€525	€550	€575
Kildare County Council	€575	€350	€750	€400	€975	€1,050	€1,100
Kilkenny County Council	€480	€230	€530	€270	€630	€660	€690
Laois County Council	€420	€240	€433	€280	€580	€610	€630
Leitrim County Council	€340	€200	€370	€220	€450	€475	€500
Limerick City and County Council	€420	€270	€450	€300	€650	€700	€750
Longford County Council	€330	€180	€350	€200	€400	€425	€450
Louth County Council	€575	€310	€650	€350	€975	€1,050	€1,100
Mayo County Council	€390	€200	€410	€220	€480	€500	€520
Meath County Council	€575	€310	€700	€350	€975	€1,050	€1,100
Monaghan County Council	€330	€200	€390	€220	€500	€515	€530
Offaly County Council	€380	€210	€435	€230	€550	€575	€600
Roscommon County Council	€360	€240	€390	€260	€500	€525	€550
Sligo County Council	€460	€220	€490	€250	€550	€575	€600
South Dublin County Council	€660	€430	€900	€500	€1,250	€1,275	€1,300
Tipperary County Council	€380	€210	€420	€230	€525	€560	€600
Waterford City and County Council	€430	€240	€450	€270	€550	€575	€600
Westmeath County Council	€450	€220	€470	€240	€600	€625	€650
Wexford County Council	€420	€280	€433	€300	€530	€565	€600
Wicklow County Council	€660	€370	€900	€410	€1,150	€1,200	€1,250

Source: HAP SSC

Appendix 4 – Average Differential Rent Payments @ 31st December 2018

Local Authority / Household Type	Single	Single +1	Single +2	Single 3+	Single Sharing	Couple	Couple +1	Couple +2	Couple 3+	Couple Sharing	Avg. Wkly Diff. Rent
Carlow County Council	€31.70	€43.54	€50.35	€47.52	€34.61	€65.11	€69.24	€69.75	€76.85	€54.00	€49.30
Cavan County Council	€28.73	€35.61	€41.45	€42.20	€34.00	€53.65	€58.69	€58.55	€65.38		€40.93
Clare County Council	€25.14	€32.17	€35.75	€41.68	€20.85	€40.96	€49.91	€54.39	€57.96	€25.00	€35.29
Cork City Council	€30.94	€38.51	€39.63	€42.66	€31.76	€53.70	€56.58	€64.54	€59.83	€63.90	€42.52
Cork County Council	€31.80	€46.82	€49.83	€51.50	€31.85	€50.52	€61.59	€66.93	€66.20	€45.38	€47.30
Donegal County Council	€28.26	€34.96	€37.46	€40.46	€27.82	€49.67	€55.96	€59.00	€63.70		€37.97
Dublin City Council	€35.61	€42.54	€45.26	€46.64	€32.96	€51.69	€60.29	€62.77	€64.79	€57.44	€46.55
Dun Laoghaire Rathdown County Council	€39.40	€51.71	€54.03	€53.88	€32.60	€63.70	€71.52	€78.53	€71.24	€66.19	€55.66
Fingal County Council	€32.30	€41.53	€45.90	€48.03	€29.38	€53.66	€59.95	€62.53	€67.29	€52.69	€50.50
Galway City Council	€35.53	€45.79	€40.29	€41.87	€34.83	€69.78	€74.96	€74.09	€69.42	€57.23	€51.58
Galway County Council	€37.21	€52.73	€57.62	€59.37	€34.56	€66.10	€74.04	€79.66	€86.30		€56.62
Kerry County Council	€27.55	€39.21	€46.55	€49.37	€22.38	€58.84	€64.43	€67.75	€72.82		€45.91
Kildare County Council	€36.12	€50.97	€57.00	€60.71	€34.57	€56.13	€68.79	€78.53	€84.83	€80.00	€59.27
Kilkenny County Council	€33.41	€48.31	€51.37	€50.40	€29.96	€66.66	€79.40	€84.76	€83.31	€65.00	€54.84
Laois County Council	€31.46	€44.45	€51.48	€59.76	€31.42	€52.53	€60.06	€65.66	€68.95	€49.17	€49.35
Leitrim County Council	€40.45	€46.25	€51.20	€58.25	€36.80	€68.72	€63.39	€71.06	€69.89		€51.04
Limerick City & County Council	€32.40	€41.41	€46.84	€49.10	€30.82	€54.77	€61.80	€66.44	€75.95	€47.75	€47.88
Longford County Council	€27.84	€41.96	€46.71	€54.35	€25.50	€52.53	€64.96	€68.78	€73.11		€44.52
Louth County Council	€30.21	€42.29	€41.90	€48.12	€25.79	€60.87	€67.34	€70.41	€73.85	€60.50	€48.48
Mayo County Council	€34.68	€44.83	€44.55	€51.24	€34.16	€54.72	€63.31	€70.28	€67.59		€44.43
Meath County Council	€38.00	€56.56	€58.45	€62.46	€34.88	€53.97	€76.93	€89.69	€92.86	€71.98	€63.53
Monaghan County Council	€30.73	€46.33	€53.91	€55.80	€27.23	€48.79	€56.60	€66.36	€75.70	€56.00	€48.22
Offaly County Council	€33.23	€44.97	€49.24	€47.85	€30.58	€54.02	€61.96	€67.12	€73.97	€62.00	€48.00
Roscommon County Council	€32.21	€46.03	€48.62	€54.24	€33.86	€62.96	€65.11	€70.59	€75.12		€48.27
Sligo County Council	€29.80	€37.98	€38.33	€43.70	€28.60	€53.62	€55.83	€56.41	€60.33		€38.53
South Dublin County Council	€27.61	€32.52	€33.89	€36.14	€27.27	€44.16	€49.27	€49.03	€47.10	€39.00	€38.60
Tipperary County Council	€24.11	€37.80	€38.37	€44.97	€24.88	€59.20	€64.67	€71.63	€74.41		€40.05
Waterford City & County Council	€30.72	€43.89	€45.49	€48.17	€28.11	€53.13	€62.08	€71.26	€76.50	€52.00	€44.84
Westmeath County Council	€34.07	€44.51	€45.76	€54.13	€29.78	€58.43	€66.03	€68.36	€67.42	€71.00	€48.06
Wexford County Council	€36.10	€47.82	€51.75	€55.25	€35.25	€58.15	€71.92	€76.18	€79.22		€50.13
Wicklow County Council	€33.68	€47.19	€50.08	€48.67	€33.87	€79.07	€81.43	€83.63	€80.79		€56.50
Average of Differential Weekly Rent	**€31.72**	**€42.77**	**€45.48**	**€48.67**	**€30.76**	**€55.26**	**€63.31**	**€67.77**	**€69.84**	**€55.89**	**€47.30**

Source: HAP SSC

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