NAMA - Housing Supply Conference

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Chief Executive
South Dublin County Council

11th September 2014

South Dublin – Ready or Not

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- Permitted developments
- Ready to go & longer term
- Recent planning patterns
- Residential density review
- Other issues
- Summary observations

Position 2014 - 2015

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- Tier 1 - Permitted ready to go – 2128 units
- Tier 2a - applications in system – 585 units
- Tier 2b – immediate opportunities with no obvious impediment capable of being permitted and commenced by end 2015 – 6446 units
- Total immediate to very short term potential – 9159 units
- Beyond – zoned land for further 20,000 units

Permitted housing

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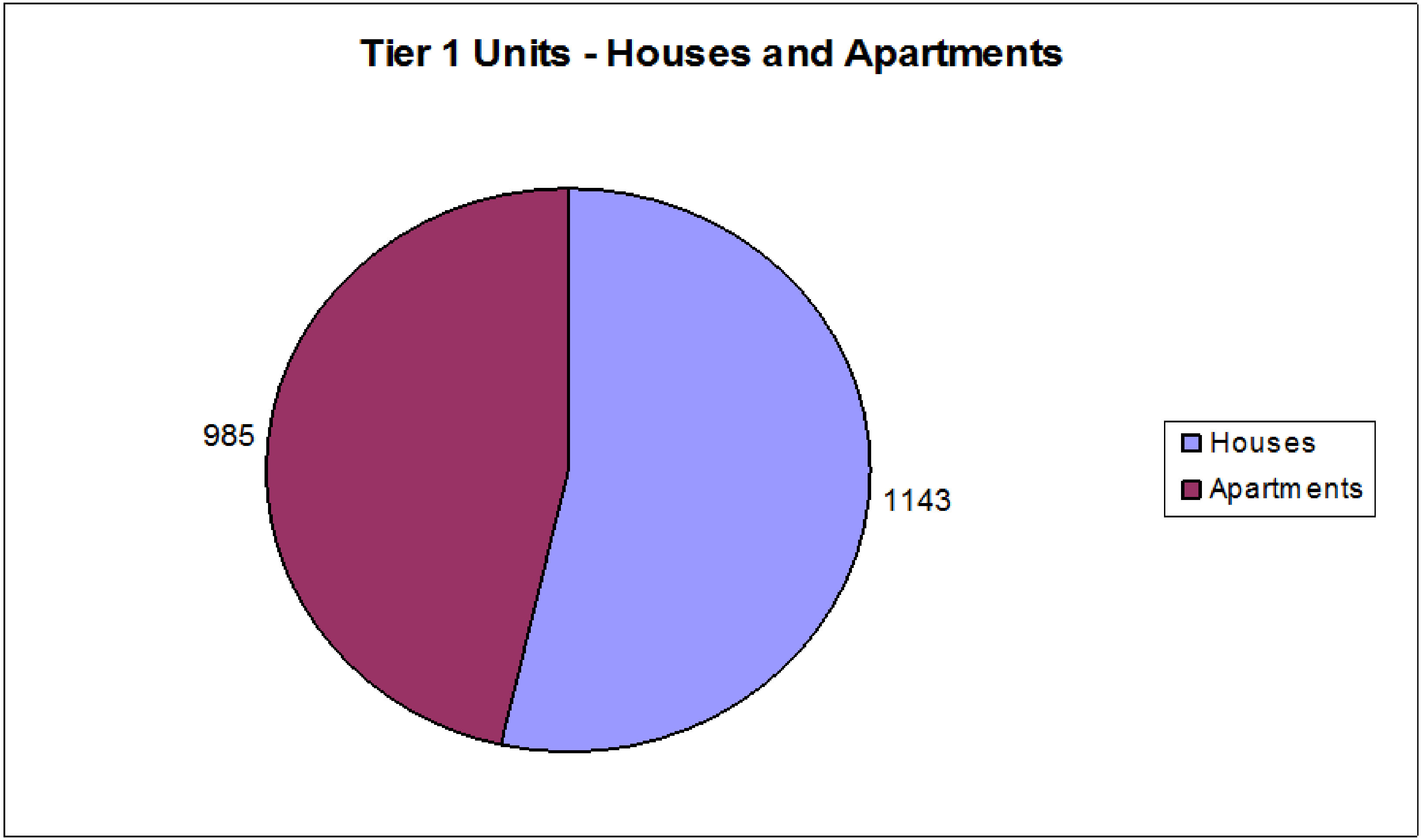

Permitted house types

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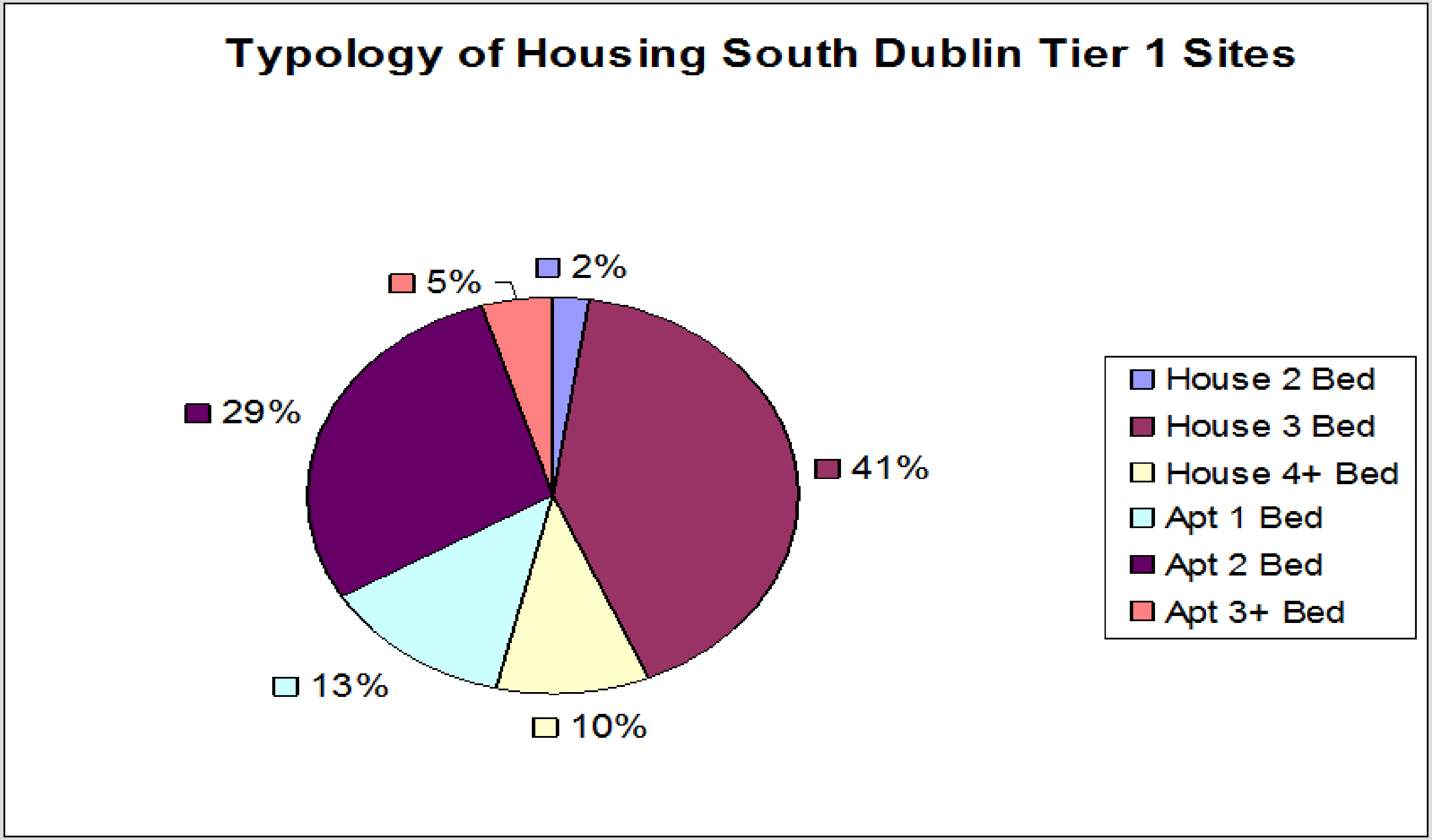

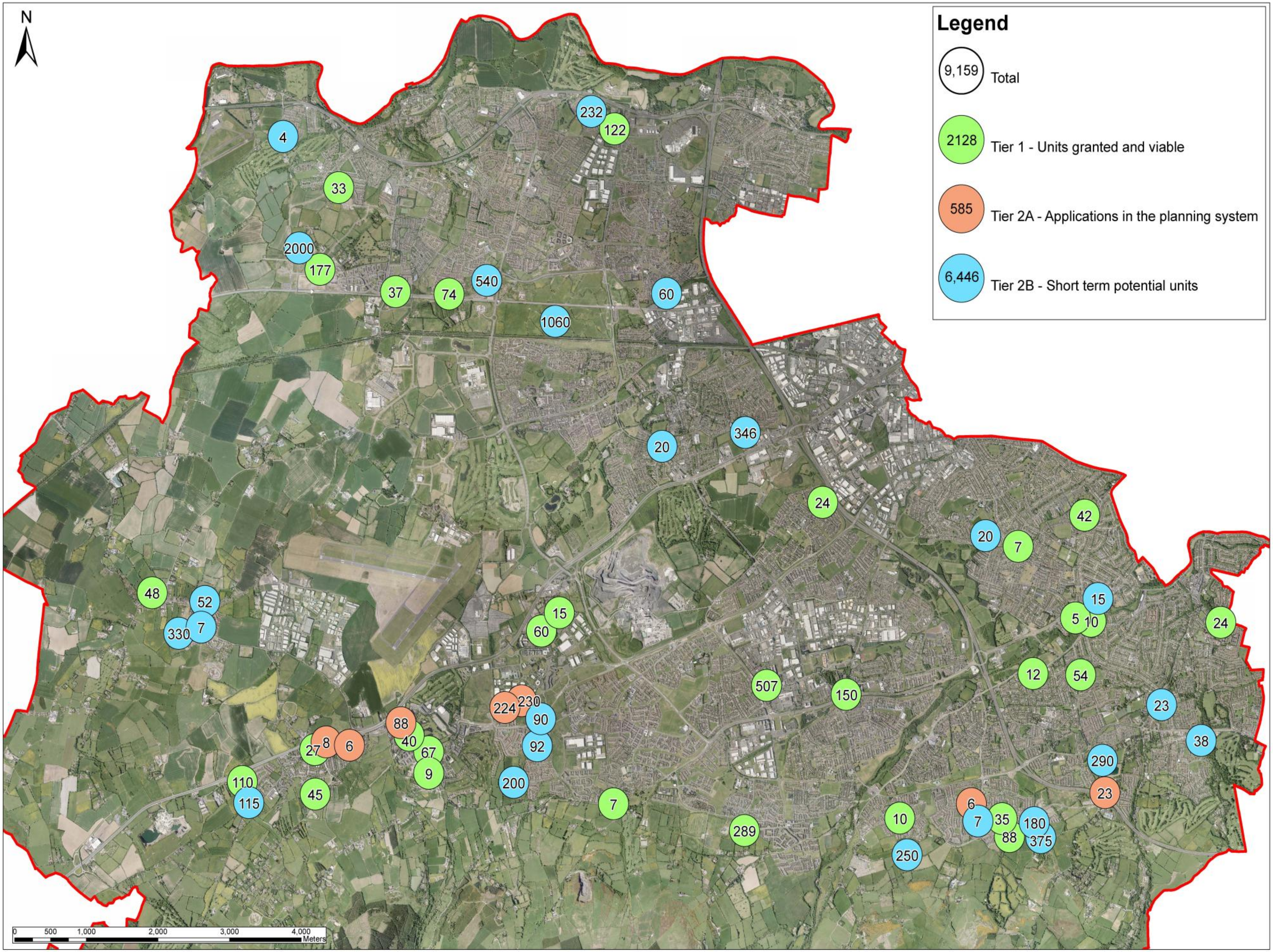
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Legend
9,159 Total
2128 Tier 1 - Units granted and viable
585 Tier 2A - Applications in the planning system
6,446 Tier 2B - Short term potential units
4
232
122
33
2000
177
37
74
540
60
1060
346
20
24
42
20
7
48
52
7
330
15
60
15
5
10
24
12
54
507
150
224
230
88
90
92
8
6
27
40
67
9
110
115
45
200
7
289
10
6
7
35
180
88
375
250
23
38
290
23
0 500 1,000 2,000 3,000 4,000 Meters

Recent Planning activity

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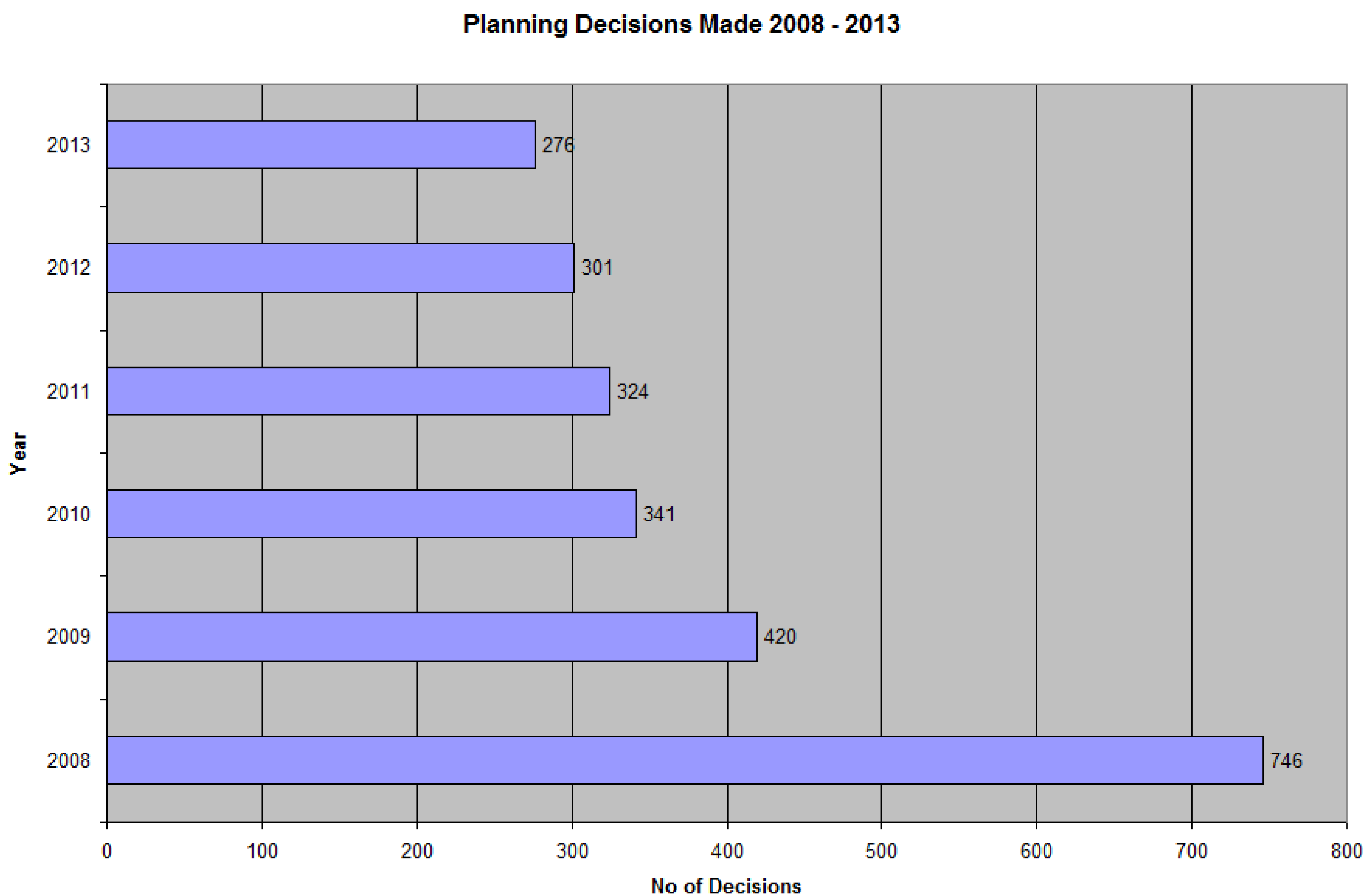

Planning activity

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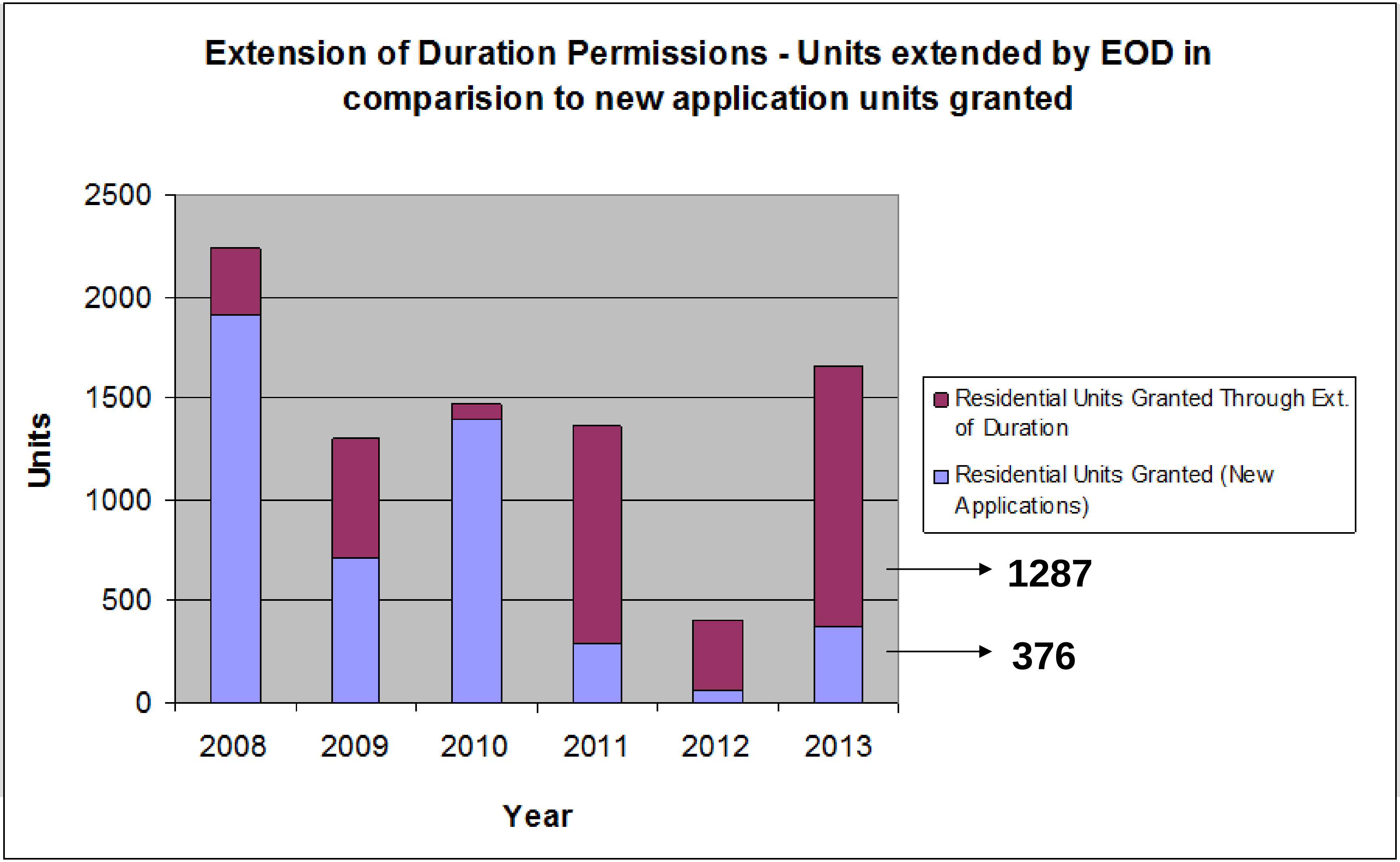

Density reviews

Plan	Year	Original Density Range (Dwellings per Ha)	Year	Revised Density Range (Dwellings per Ha)
Fortunestown Local Area Plan	Part covered by Cooldown Commons Area Plan (July 2006) & Fortunestown Lane/Garter Lane Local Area Plan (February 2009)	35-75	2012	30-50
Newcastle Local Area Plan	2003	15-45	2012	15-35
Ballycullen-Oldcourt Local Area Plan	Ballycullen Action Area Plan 2000	35-50	2014	12-38
Adamstown SDZ Planning Scheme	2003	53-64	2014	44-51
Clonburris LAP & SDZ Planning Scheme	2008	67-95	2014	Currently Under Review

Density and diminishing returns

- Significant evaluation as part of plan reviews
- When density reaches 50 per hectare :
  - Mix dependent on greater number of apartments
  - Either visually dominant surface parking or costly underground parking
  - Higher build costs = higher densities
  - Higher densities = increased costs , lifts , common areas etc
  - 45 DPH seems to be about optimum

Other issues

- Development levies
- Social housing
- Review of county development plan
- Property economics – real time information
- Stability of supply
- Consumer confidence – visibility of supply

Summary observations

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- Permitted developments not the issue
- Planning applications not reflecting demand messages
- Supply shortage price premium – localised
- Anecdotal observations
  - Appetite and capacity – mobilisation costs
  - Price needs to increase to cover costs
  - Absence of homogenous market
  - What will government do in 2015 budget
  - NAMA on the move
  - Will overseas purchasers of sites hold out