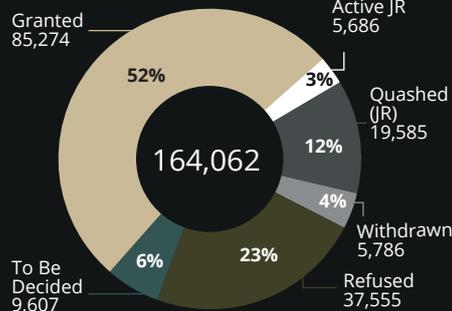


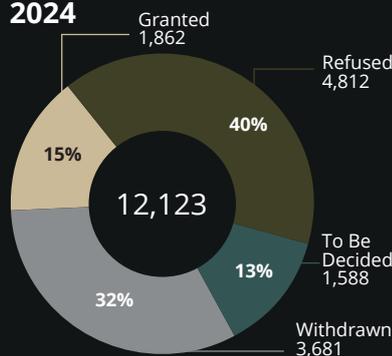
STRATEGIC HOUSING DEVELOPMENT (SHD) PLANNING STATS

SHD APPLICATIONS

2018 - 2024

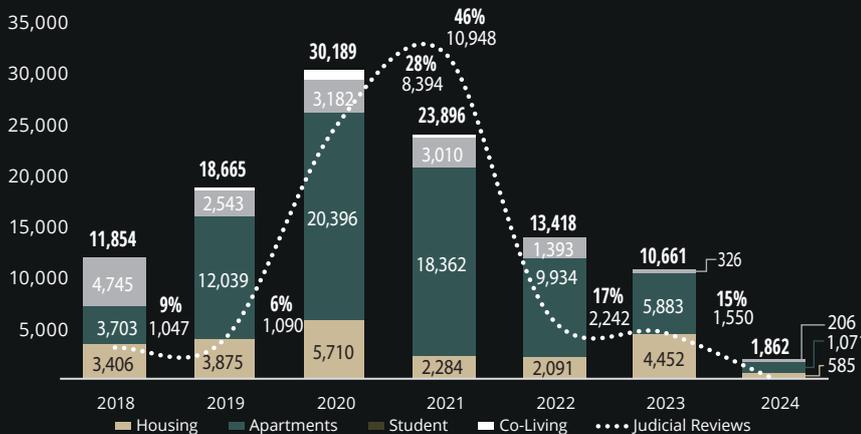


2024



- SHD's yet to be decided upon by ABP have reduced from 55 schemes (20,683 units) in 2023 to 29 schemes (9,607 units), a 54% reduction. The remaining 29 schemes are an average of **712 days** late at the end of '24.
- The 29 schemes were due to be assessed by ABP since between Feb 2022 and Nov 2024.
- Of the 29 schemes, 34% are housing, 61% are apartments, 3% are student and 2% is Co-Living.
- SHD permissions accounted for 1,862 units in 2024, none of which are currently subject to JR.
- Refusal rate in 2024 higher than average (40% vs. 23%)

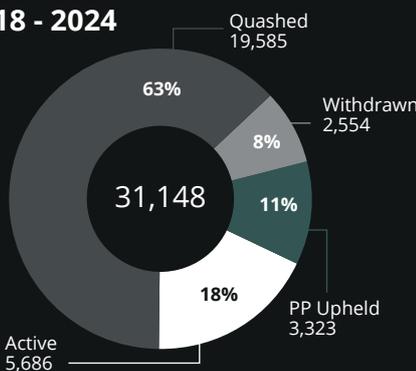
SHD PERMISSIONS



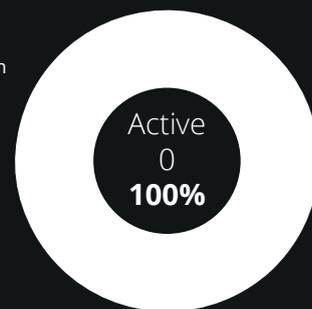
- The SHD process ceased from 25th February 2021
- The current permissions being granted were applied for before Feb 2021
- The % of JR's has fallen again this year - down from a high of 48% in 2021 to 0% in 2024' permissions.
- While preference was given to housing over apartments in 2023, this has changed in 2024, with 58% of granted permissions in 2024 for apartments compared to 31% for housing.
- The number of student schemes awaiting decision at the end of 2023 has fallen from 1,280 to 260 units.
- The co-living typology, banned since Nov 2020, made up 1.2% (1,349 units) of all SHD permitted schemes

SHD JUDICIAL REVIEWS

2018 - 2024



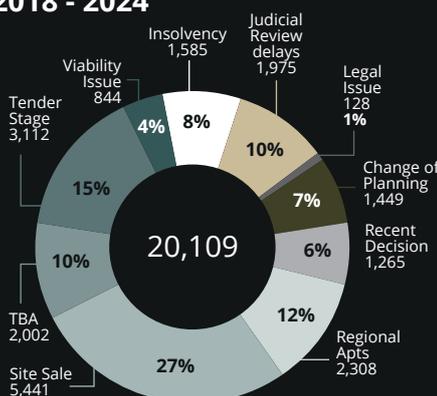
2024



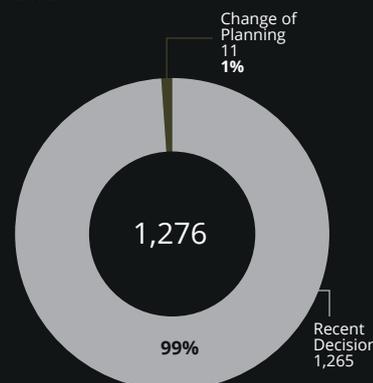
- There are 20 Nr. SHD schemes (5,686 units) held up in JR's yet to be ruled upon by courts. This is a reduction of 10 schemes (2,548 units) in the since 2023.
- Of the 20 schemes, 26% are housing, 72% are apartments and 4% are student
- There are no active JR's on 2024 schemes.
- Of the 19,585 (2,362 increase on 2023) units quashed, 12,321 (38 schemes) reapplied again with a new planning application. Some were subject to JR again and some received permission

SHD NON-COMMENCEMENTS

2018 - 2024



2024



- The number of non-commencements (schemes that have a valid planning permission but haven't started on site) reduced by 37% from 87 schemes (30,956 units) to 56 schemes (20,109 units) since 2023. 76% of these units commenced construction, 16% reapplied for new planning applications and 8% were subject to new judicial review proceedings.
- It is clear that the government initiatives including the Levy Waiver, LDA Initiatives and AHB's played a key role in enabling the commencements.
- It is likely that the 20,109 units will take 1-2 years to commence and will likely involve site sale or State intervention to proceed.
- There are 5,038 student beds yet to commence.
- It is likely that the 5 permitted schemes that were recently granted planning in 2024 (1,265 units) will commence in 2025.

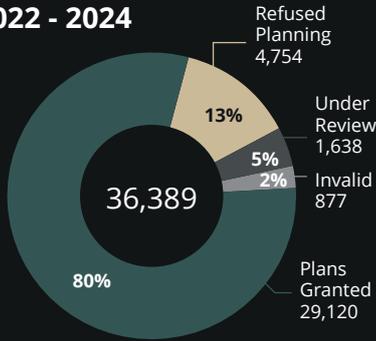
FAST-TRACK PLANNING ROUTES (SHD/LRD) INFOCARD JANUARY 2025



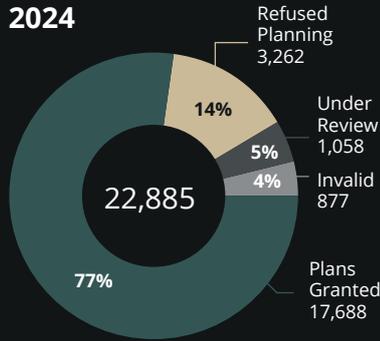
LARGE-SCALE RESIDENTIAL DEVELOPMENT (LRD) PLANNING STATS LRD APPLICATIONS

LRD APPLICATIONS

2022 - 2024

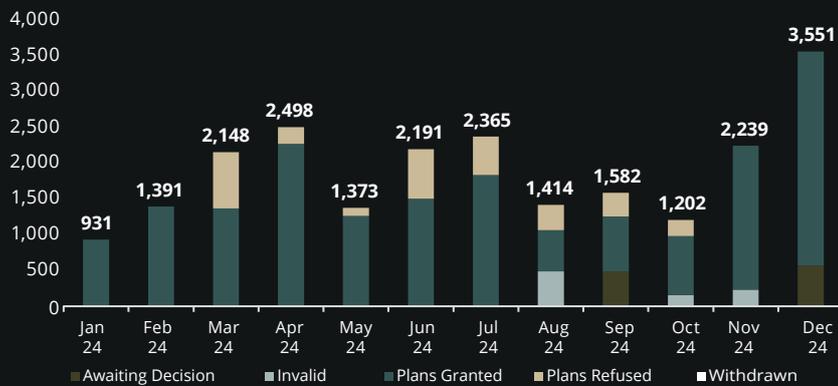


2024



- There were 170 schemes (+106 on last year) applied for under the LRD system by the end of 2024. 99% of the schemes were decided on in time, with some in advance of the ABP deadline.
- 80% of LRD's to date have been approved compared to 52% of the SHD schemes.
- There are a further 34 schemes to be opined upon by ABP by April 2025, which make up 7,817 units. 57% are in the GDA

LRD PERMISSIONS



- 89 schemes were granted permission in 2024, resulting in 17,688 units, which is 9,572 more than 2023.
- 80% of schemes were granted permission, compared to 52% under the SHD route.
- 14% of LRD schemes were refused compared to 22% in SHD.
- Only one scheme has yet to be decided upon. The scheme has had a difficult planning history with multiple JR's.
- The LRD programme granted 89 permissions (17,688 units) in 2024 comprising 48% apartments, 40% housing and 12% student.

LRD JUDICIAL REVIEWS

2018 - 2024



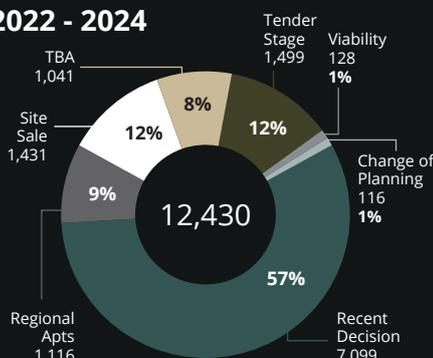
2024



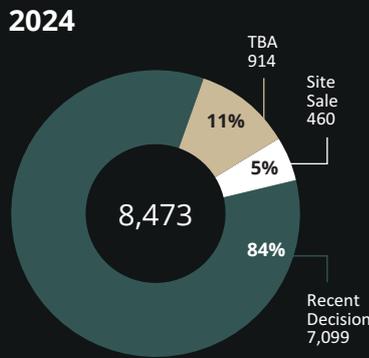
- Of the 17,688 units granted permission in 2024, there were 824 JR's at the end of December 2024.
- There were 13 schemes still within the 8 week JR notice period (where a JR can still be taken) at the end of 2024.
- There are 2,070 units currently held up in JR's for the overall 28,986 permitted LRD units, which equates to 7%.
- The 7% JR rate compares with the 19% JR rate for SHD's on average for SHD's from 2018-24.
- The 82% usable permissions, after JR, compares to 51% under the SHD route.

LRD NON-COMMENCEMENTS

2022 - 2024



2024



- 45 schemes or 47% (13,755 units) have a valid planning permission but haven't started on site
- 84% of the 2024 non-commencements are recent planning permissions.
- The recent permissions (7,099 units) make up 57% of the 2022-24 non-commencements.
- The 13,755 units not yet commenced include 15% housing, 67% apartments and 17% student.
- Viability issues including Site Sales and Regional Apartments make up 24% (3,363 units) of the non-commencements to date.

SHD Vs LRD

