



County Offaly Housing Strategy and HNDA 2021-2027

DRAFT




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Executive Summary

This Housing Strategy has been prepared to meet the statutory requirements set out under Section 94 of Planning and Development Act, 2000 (as amended). Under Part V of the Act, it is the requirement of each planning authority to prepare a Housing Strategy which will cover the period of its development plan.

The purpose of the Housing Strategy is to ensure that through proper planning and sustainable development the county provides for the housing needs of its existing and future population of the area. It is a critical component of the County Development Plan and plays a key role in translating national housing policies and housing supply responses to the local level.

Chapter 1 introduces the Strategy, outlining its key requirements, objectives and purposes. It also discusses the sequential steps involved in the development of the housing model developed to project future housing requirements in the County over the plan period.

Chapter 2 focuses on the Strategic legislative and policy framework which underpin the Strategy.

Within Chapter 3 a review and analysis of the existing housing context is conducted through an assessment of relevant CSO and local authority data.

The determination of housing need and supply over the operational period of the development plan is then analysed and discussed in Chapter 4, projecting and determining the future housing requirements to cover the period between 2021-2027.

Chapter 5 then succinctly summarises the overall housing requirements for the county having regard to the supply and demand analysis outputs discussed in the previous chapters.

Having regard to the housing requirements that have emerged during the preparation of the strategy Chapter 6 outlines a number of housing objectives that inform the overall approach to the housing strategy, formalising these objectives through a series of recommended housing policies.

The Housing Strategy is then concluded in Chapter 7 with a brief review of the findings and requirements.

1.0 Introduction and Methodology

1.1 Overview

This Housing Strategy has been prepared by Future Analytics Consulting on the behalf of Offaly County Council to meet the statutory requirements set out under Section 94 of Planning and Development Act, 2000 (as amended). Under Part V of the Act, each planning authority must prepare a Housing Strategy which will cover the period of its development plan. Each strategy must have regard to the proper planning and sustainable development of the area and must address the overall supply of housing within the administrative boundary of the Local Authority. The Housing Strategy also addresses relevant provisions contained within the Housing (Miscellaneous Provision) Act, 2009 and the Urban Regeneration and Housing Act 2015.

The purpose of the Housing Strategy is to ensure that the proper planning and sustainable development of the county provides for the housing of the existing and future population of the area in the manner set out in the Strategy. The Plan and the Housing Strategy will embrace the Vision set out in The Social Housing Strategy 2020 that *“every household in Ireland will have access to secure, good quality housing suited to their needs at an affordable price in a sustainable community”*.

The Housing Strategy is a critical component which informs the policies and objectives of the County Development Plan, playing a key role in translating national housing policies and housing supply responses to the local level. Since the previous Housing Strategy was prepared there have been significant changes in planning legislation and policy. In particular, this Housing Strategy must be consistent with the National Planning Framework (NPF) and the Eastern and Midland Regional Spatial and Economic Strategy (RSES).

In line with this, the NPF requires each Local Authority to develop a Housing Need Demand Assessment (HNDA) which must underpin and support the preparation of housing strategies and all related housing policy outputs. The HNDA for County Offaly, as elaborated in section 1.2 and 1.3, provides a robust evidence base to inform decision-making around the current and future housing supply and investment in housing related infrastructure and services, the location and requirements for different house types, sizes and tenures and the requirements for residential zoned land.

1.2 Housing Strategy / HNDA – Guiding Principles

An evidence-based and future-proofed methodological approach has been adopted to ensure that the County Offaly Housing Strategy meets the housing needs of the county and its residents while remaining in keeping with local, regional and national guidelines. The Strategy is underpinned by a HNDA which provides a robust baseline to inform and guide policies and objectives under the Offaly County Development Plan 2021-2027.

Declines in the construction sector and wider economic activity in the previous decade, coupled with Ireland’s emerging economic recovery have led to ongoing challenges around fluctuations in the supply, demand and price of housing. It has also led to opportunities, with a greater mix of house types and tenures diversifying Ireland’s housing market. Aside from the traditional home-ownership model, rental accommodation will play a greater role in the provision of housing in Offaly. And increasing levels of activity in the construction sector will provide new homes to meet current and projected demand and contribute to County Offaly’s social housing stock by way of Part V obligations. The HNDA incorporates a range of socio-economic and demographic data to analyse current levels of demand and supply within Offaly housing sector, and project for future need over the lifetime of the Development Plan and beyond to 2031. It incorporates demand across different tenures, including owner-occupied, the rental sector and social housing and provides estimates of future housing needs based on employment growth, income levels and affordability in the housing market.

1.3 Housing Need Demand Assessment (HNDA)

Under Section 94 (1) (a) of the Planning and Development Act 2000 (as amended), each planning authority “shall include in any development plan a strategy for the purpose of ensuring that proper planning and sustainable development of the area of the development plan provides for the housing of the existing and future population of the area in the manner set out in the strategy”.

This must take into account;

- the existing need and the likely **future need for housing**;
- the need to ensure that housing is available for persons who have **different levels of income**;
- the need to ensure that a **mixture of house types and sizes** is developed to reasonably match the requirements of the different categories of households, as may be determined by the planning authority, and including the special requirements of elderly persons and persons with disabilities, and;
- the need to **counteract undue segregation** in housing between persons of different social backgrounds.

In order to ensure that the plan-making system is supported by a robust methodology to inform policies and funding initiatives around housing and associated land requirements, the NPF has introduced a new requirement for each Local Authority to develop a Housing Need Demand Assessment (HNDA). The HNDA will support the preparation of housing strategies and all related housing policy outputs, e.g. city and county development plans, local area plans, traveller accommodation plans etc.

The NPF indicates that the purpose of the HNDA tool is to:

- Assist local authorities to develop long-term strategic views of housing need across all tenures.
- Provide a robust evidence base to support decisions about new housing supply, wider investment and housing related services that inform an overall national housing profile.
- Inform policies about the proportion of social and affordable housing required, including the need for different types and sizes of provision.
- Provide evidence to inform policies related to the provision of specialist housing and housing related services.

The NPF notes that HNDAs are designed to give broad, long run estimates of what future housing need might be, rather than precision estimates. The Framework must be logical, sequential and allow for updating, monitoring and evaluation. The HNDA undertaken as part of this Development Plan spans two key stages – current and future outlook; and assesses three core areas: Population, Housing and Economy. These are set out in figure 1.1 below. The sequential steps involved in the development and application of this HNDA model is then presented in Section 1.4

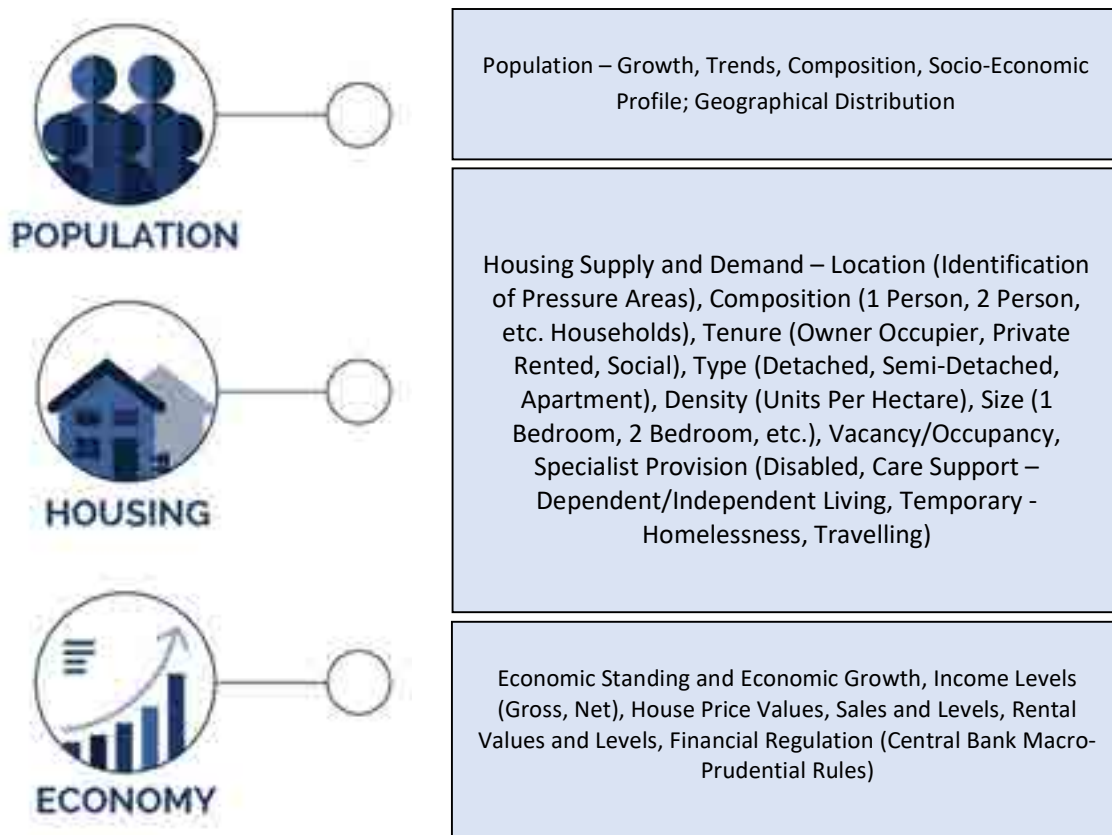


Figure 1.1: HNDA Assessment Areas. Source: Future Analytics Consulting

The methodological approach to the HNDA undertaken as part of the Offaly Housing Strategy 2021-2027 is summarised in figure 1.2 below. The process will enhance how acute and unmet demand for housing is identified before it arises. It provides a robust assessment of regional and localised influences, such as population and migration, in quantifying needs and demands. The key evidence inputs which drive the model are:

1. **Demographic trends, affordability trends and wider economic trends.**
The use of **economic forecasting or econometric** work underpins this section. Data requirements include **household composition/projections, house prices, rents, number of first-time buyers (FTBs) and loan to value (LTV) mortgage rates, economic activity and employment rates, etc.**
2. **Housing Stock Profile Pressures (and existing need) and management issues.**
This involves undertaking a detailed profile of local **housing stock and stock pressures**, including **local authority housing**, to identify the main pressures relating to supply and demand, ineffective stock and overall condition as well as priorities for future stock management. Information is required on **dwelling size, dwelling type, dwelling condition and stock pressures (occupancy/under occupancy stock turnover, etc.)**.
3. **Estimating Future Housing Need and Demand.** This is broken down into: **owner occupation, private sector, below market rent and social rent.**

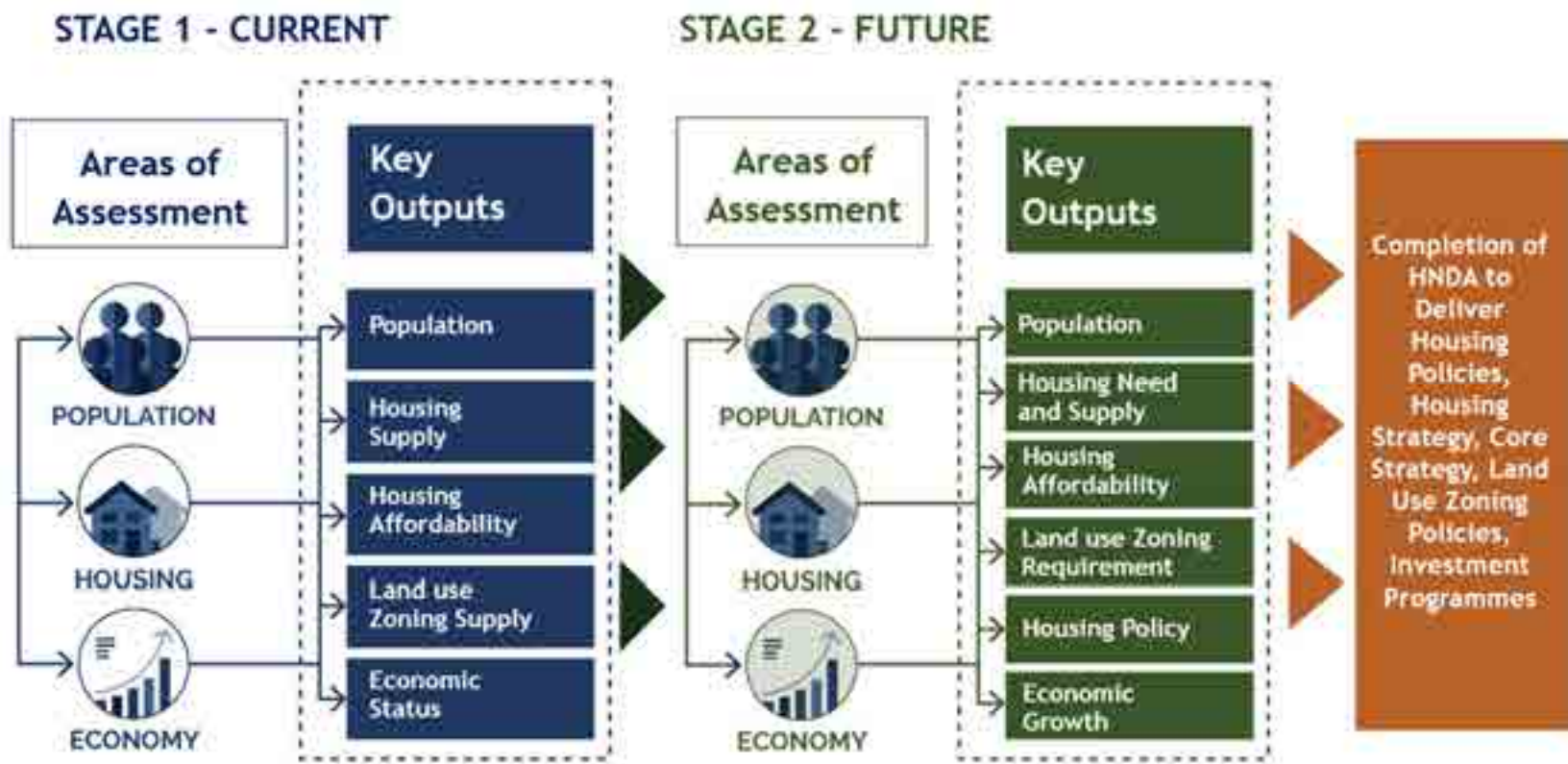


Figure 1.2: Schematic of HND A Approach. Source: Future Analytics Consulting

1.4 Methodology

This Section sets out the sequential steps involved in the development and application of this HNDA model. There are three components of the model, as shown in Figure 1.3.



Figure 1.3: Overview of the HNDA Model

The first component of the model explores population scenarios for the county over the plan period. The population projection in this strategy has been undertaken based on the detailed application of the “Demographic Component Method” that clearly integrates the dynamic components of population change namely, mortality, fertility and migration, and enables age cohort analysis. In accounting for the NPF population growth targets, an interpolation of the required level of change per annum was developed for County Offaly from baseline year 2016 to target years 2026 and 2031; thus producing annualised figures between the 2021 and 2027 lifetime of the plan. This is referred to as the 'Policy-Intervention Scenario', as it aligns with the growth trajectory established by the NPF. This stage of analysis also comprises an investigation into Average Household Size, as a key determinant of future housing need.

The second component relates to an assessment of housing affordability. This assessment supports the identification of social (and affordable) housing needs for Offaly County during the plan period. There are 12 steps inherent in this, as illustrated in Figure 1.4.

Finally, analysis of progress towards key targets for social housing under Rebuilding Ireland has been set out in addition to specific examination of single one-off dwellings within County Offaly.



Figure 1.4: Approach to Assessing Affordability, Supply and Social (and Affordable) Requirements

The following overall structure of this Housing Strategy is summarised below:

Table 1.1 Structure of the Offaly Housing Strategy 2021-2027

Section 2.0	Strategic, Legislative and Policy Landscape
Section 3.0	Current Housing Context: Review and Analysis of Existing Supply and Needs
Section 4.0	Future Housing: Projected Housing Need and Supply
Section 5.0	Analysis of Housing Requirements in Offaly
Section 6.0	Policy Objectives to Deliver Housing Strategy
Section 7.0	Conclusion

2.0 Strategic, Legislative and Policy Landscape

2.1 National Legislation and Policy

Planning and Development Act 2000

Under Part V of the Planning and Development Act 2000 (as amended) Local Authorities are required to ensure that Development Plans are consistent with high-level strategic policies and national population projections. As such Development Plans are to incorporate a Core Strategy that demonstrates consistency with relevant national and regional objectives as set out in the National Planning Framework and Regional Spatial and Economic Strategies.

Local Authorities are also required to prepare and incorporate a Housing Strategy into their Development Plan, the purpose of which is to ensure that the housing needs of the existing and future population of the development plan area are met. The Act states that:

“...each housing strategy should have regard to the proper planning and sustainable development of an area and should be concerned with the overall supply of housing within the planning authority.”

The Act further specifies that Housing Strategy’s must consider:

- The existing and likely future need for social housing
- The need to ensure that housing is available for people of different incomes.
- The need to ensure the availability of a mixture of house types and sizes to cater for the requirements of different categories of households, including the special requirements of elderly persons and persons with disabilities
- the need to counteract segregation in housing between persons of different social backgrounds.

It is required that each Housing Strategy be consistent with high level strategic plans such as the National Planning Framework and the Rebuilding Ireland: Action Plan for Housing and Homelessness. Planning Authorities are also required to demonstrate how the Housing Strategy aligns with the population projects contained in the Core Strategy and the Regional Spatial and Economic Strategy for the Region.

Planning and Development (Amendment) (No. 3) Regulations 2018

A relevant recent legislative update with respect to housing is the Planning and Development (Amendment) (No. 3) Regulations 2018. The amendment provides that the temporary change of use of certain vacant commercial premises to residential use is exempted, i.e. without the need to obtain planning permission. The change of use, and any related works, must occur between when the Regulations come into operation on 8 February 2018 and 31 December 2021. In addition, the existing structure or part of the structure, which is the subject of the change of use, is required to be vacant for a period of two years immediately prior to when the development takes place. A number of other conditions and limitations apply, notably including:

- There shall be no more than 9 individual residential units within a building (i.e. staying below the Part V social housing threshold).

- No works permitted to protected structures unless a s.57 declaration has issued to indicate the works will not affect the character or elements of the structure which has been identified for protection.
- Works to the ground floor of any structure shall not conflict with an objective in a development plan for the structure to remain in retail use, with the exception of works solely for the provision of on-street access to upper floors.
- The exemption applies to existing buildings that have a current commercial use (with reference to Class 1, 2, 3, and 6 of Part 4 to Schedule 2 of the Principal Regulations).

The Planning and Development (Housing) and Residential Tenancies Act 2016

The Planning and Development (Housing) and Residential Tenancies Act 2016 provides a legislative basis for measures introduced under the Rebuilding Ireland: Action Plan for Housing and Homelessness to expedite the construction of large-scale residential developments. These “strategic housing developments” avail of a fast-track application process, whereby applications for planning permission are submitted apply directly to An Board Pleanála. This measure was introduced under the Rebuilding Ireland Action Plan for Housing and Homelessness in order to streamline the planning process and accelerate the delivery of new housing and student accommodation units.

Part 2(3) of the Act defines the following types of developments as qualifying as strategic housing developments:

- a) the development of 100 or more houses on land zoned for residential use or for a mixture of residential and other uses,
- b) the development of student accommodation units which, when combined, contain 200 or more bed spaces, on land the zoning of which facilitates the provision of student accommodation or a mixture of student accommodation and other uses thereon,
- c) development consisting of shared accommodation units that when combined contain 200 or more bed spaces on land the zoning of which facilitates the provision of shared accommodation or a mixture of shared accommodation and other uses,
- d) development that contain a mixture of houses, student accommodation or shared living units,
- e) the alteration of an existing planning permission granted under section 34 (other than under subsection (3A) where the proposed alteration relates to development specified in paragraph (a), (b), or (c).

Under this streamlined application process applicants engage with the relevant Local Authority and the Board in a Pre-Application Consultation to discuss a proposed development, determine its legitimacy and highlight any potential issues that may arise. Then upon submission of an application for planning permission, the Board are to provide a decision within sixteen weeks of application. To maintain this deadline there is no provision for the applicant to provide further information in support of their application once submitted, and no provision for an appeals process by which the applicant or any third party can dispute the Boards decision. As such decisions to grant or refuse permission for strategic housing developments can only be disputed by way of a Judiciary Review.

Urban Regeneration and Housing Act 2015

Under Part V Section 91(4)(c) of the Planning and Development Act 2000 there is a social housing requirement of 10% which planning authorities must apply to planning permission for housing on all lands zoned for residential use, or for a mixture of residential and other uses. Introduced in 2015 the Urban Regeneration and Housing Act includes amendments to the Planning and Development Act 2000. These amendments determine thresholds for this social housing requirement and specify how private developers can meet their obligations to contribute to the provision of social housing. Whereas previously social housing obligations were disapplied in the case of developments including four or fewer residential units, obligations are now disapplied in respect of developments that include nine or fewer units. The use of cash payments as an alternative to social housing units is no longer permitted, and provision is made for the transfer of residential units outside the lands which are subject to planning permission, but within the relevant Development Plan area. The full list of social housing delivery options now permitted are outlined below.

Part V delivery options (Post Act 2015)

- The transfer of ownership of lands, subject to the planning permission application to a local authority for the provision of social housing remains the default option. The land option must be acceptable to the local authority
- The transfer of ownership to the local authority, or persons nominated, of completed social housing units on the land, subject to planning permission
- The transfer of ownership to the local authority, or person nominated, of completed social housing units on other land, not subject to the planning permission. There is no longer a requirement for the developer to build housing units on other land to fulfil his/her Part V obligations. The developer might have a stock of suitable houses or he/she can simply acquire housing units for such purposes. This allows social housing units to be delivered in a more timely fashion in another location, in the event that the development that is the subject of the planning permission does not meet the social housing or mixed tenure needs of the local authority:
- The Part V obligation can now be fulfilled by developers through long term leasing of properties: and
- A combination of the Part V options above is also allowed.

The Urban Regeneration and Housing Act 2015 also introduced wider changes aimed to encourage activity in the construction sector. A vacant site levy was introduced, permitting Local Authorities the power to apply levies to property owners who do not take steps to develop vacant and under-utilised in areas identified for priority development under the local Development Plan. Developers were also permitted to avail of reduced development contributions for developments that had previously been granted permission but were yet to commence.

The Housing (Miscellaneous Provisions) Act 2009

The Housing (Miscellaneous Provisions) Act 2009 makes amendments and extensions to provisions under the Housing Acts 1966 to 2004 to provide Local Authorities with a strategic framework for the delivery and management of housing services. This requires Local Authorities to adopt housing services plans to cover the delivery and management of housing services within the Local Authorities' areas, as well as homelessness action plans and anti-social behaviour strategies. It provides a legislative basis for objective methods to assess need and allocating social housing support which incorporate household size, household income and house and rental prices within a Local Authority's administrative area. The Act also extends the legislative basis for the provision of rented social housing by means of leasing or contract arrangements with private landlords.

Project Ireland 2040 – National Planning Framework

The National Planning Framework (NPF) is a high-level strategy that will shape Ireland's growth and development up to the year 2040. Drawing upon lessons learned from the implementation of the National Spatial Strategy 2002-2022, the NPF calls for a shift from an uncoordinated "business as usual" approach to planning, and provides a framework for the sustainable development of Ireland's existing settlements.

The NPF sets an overall national target to deliver 550,000 additional households by 2040. This is supported by a number of National Policy Objectives that seek to deliver residential development at a suitable density and scale.

National Policy Objective 32: *To target the delivery of 550,000 additional households to 2040.*

National Policy Objective 33: *Prioritise the provision of new homes at locations that can support sustainable development and at an appropriate scale of provision relative to location*

National Policy Objective 35: *Increase residential density in settlements, through a range of measures including reductions in vacancy, re-use of existing buildings, infill development schemes, area or site-based regeneration and increased building heights.*

To underpin the delivery of these targets the NPF requires Local Authorities to develop a Housing Need Demand Assessment (HNDA). A HDNA is defined as a "database which allows local authorities to run a number of different scenarios to inform key decisions on housing need and supply." They will provide long-term estimates of future housing needs to support the preparation of Housing Strategies and inform housing policy outputs. The NPF lists a number of key evidence inputs that will inform and drive the HDNA model, based around:

- Demographic trends, affordability trends and wider economic trends.
- Housing Stock Profile Pressures, existing need and management issues
- Estimate future housing need and demand.

National Policy Objective 37: *A 'Housing Need Demand Assessment' (HNDA) is to be undertaken for each Local Authority Area in order to correlate and accurately align future housing requirements. The HNDA is:*

- *to be undertaken by Local Authorities with coordination assistance to be provided by the Regional Assemblies, and also at a Metropolitan scale, particularly where inter-county and inter-regional settlement interactions are to be planned for and managed;*
- *to primarily inform housing policies, housing strategies and associated land use zoning policies as well as assisting in determining where new policy areas or investment programmes are to be developed;*
- *and to be supported, through the establishment of a coordination and monitoring unit to assist Local Authorities and Regional Assemblies in the development of the HNDA (DHPLG, Regional Assemblies and the Local Authorities). This will involve developing and coordinating a centralised spatial database for Local Authority Housing data that supports the HNDA being undertaken by Local Authorities.*

Implementation Roadmap for the National Planning Framework

The Implementation Roadmap for the National Planning Framework supports the alignment of national, regional and local planning policy and objectives. It provides transitional population projections for the period up to 2031, and sets out mechanisms to ensure that Development Plans align with the NPF and Regional Spatial and Economic Strategies in addressing the six-year period up to 2026/2027. They allow for the Development Plan Review Process to be deferred on a once-off basis up to three months after the relevant RSES has been finalised, and for Review Processes underway to be suspended until the relevant RSES has been finalised. This aims to ensure that Development Plans can benefit from latest available data and policy contexts. Recently adopted plans that were completed before the relevant RSES can also be brought forward for early review or variation to render them consistent with relevant regional policies and objectives.

As such, most City and County Development Plans will undergo a process of review by 2020/2021 and will cover the six-year period up to 2026/2027. 2027 will provide an assessment of the first full round of Development Plans that have been prepared in accordance with the NPF and RSES for Ireland's three regions. This assessment will coincide with several other key deadlines; 2026 is a Census Year and 2027 will see a review of the ten-year National Development Plan. Further, Development Plans prepared in 2020/2021 will commence review in 2025/2026 and will require demographic data for the six-year period beyond to 2031. Therefore, the Roadmap provides transitional population projections in line with these deadlines, noting that:

“The critical population projection periods are to 2026 and 2031, with a particular emphasis on the initial six-year period to 2026, for city and county development plans that are to be formulated during the 2019-20/21 period.”

Table 1.1 Transitional Regional and County Population Projections to 2031 for the Eastern and Midland Regional Assembly.

Regions and Counties	2016	2026	2031
Mid-East			
Kildare	222,500	249,000-254,000	259,000-266,500
Meath	195,000	216,000-221,000	225,500-231,500
Wicklow	142,500	155,000-157,500	160,500-164,000
Louth	129,000	139,000-144,500	144,000-151,500
Subtotal	689,000	759,000-777,000	789,000-813,500
Midlands			
Westmeath	89,000	96,500-98,500	100,000-102,500
Laois	84,500	92,500-94,000	95,500-97,500
Offaly	78,000	85,000-86,500	88,000-90,000
Longford	41,000	44,500-45,500	46,000-47,000
Subtotal	292,500	318,500-324,500	329,500-337,000
Dublin			
Dublin	1,347,500	1,489,000-1,517,500	1,549,500-1,590,000
Total	2,329,000	2,566,500-2,619,000	2,668,000-2,740,500

Project Ireland 2040 – National Development Plan 2018-2027

Building resilience in housing is a key element of Project Ireland 2040 with wide ranging measures set out in the National Planning Framework to 2040 and the National Development Plan 2018-2027. These includes measures to reduce vacancy rates and to bring habitable properties back into use particularly in cities and large towns where demand is highest. A new land-management agency is to be established as part of the National Planning Framework. This agency to be known the National Regeneration and Development Agency will be set up by local authorities to release strategically located land banks for redevelopment. The Agency will co-ordinate the development of State-owned land, such as that held by councils and State agencies. It is understood that that the Agency will also have the power to acquire privately-owned lands through compulsory purchase orders (CPOs) and to drive the renewal of strategic areas not being utilised to their full potential.

The NPF identifies a requirement for 550,000 additional households to 2040 with 25,000-30,000 new homes delivered every year to 2040 in order to respond to the expected growth in population during this time. In relation to the Eastern and Midland Region it is outlined that 50% of all new housing built within this region will be within the existing footprint of Dublin City its suburbs, with 30% of all new housing outside of Dublin contained within existing urban footprints.

In terms of social housing, the National Development Plan will, through a planned capital investment of over €4.2 billion, support the delivery of some 40,000 new social housing homes by 2021. Direct Local Authority build, acquisitions, rejuvenation of formerly empty homes and provision by housing bodies are identified as the chief delivery mechanisms. By 2021, 12,000 social housing homes will be made available annually by Local Authorities and approved housing bodies for social housing. This level of provision is to be maintained over the remainder of the period of the National Development Plan, resulting in 112,000 households having their housing needs met in a social housing home by 2027. The NPF warns against the intensification of social housing properties in areas that are already dense with social housing and advocates the development of diverse neighbourhoods with a healthy balance of public and private housing.

The NPF also emphasises the need for more affordable homes for sale or rent. More proactive land management and coordinated and efficient provision of enabling infrastructure, particularly on local authority and State-owned lands, are set out as central measures to delivering affordability in the housing sector.

Housing will need to be well-located, affordable and diverse in order to cater for the increased demand particularly for smaller homes suitable for one and person households. Housing should be re-usable, adaptable and accessible to ensure that homes can meet the changing needs of households over time (Objective 34). New housing provision should be met within existing settlements and should be tailored to meet the future housing needs of the settlement in which it is located.

Building resilience and being able to adequately respond to future demand will also involve the re-use of existing housing stock. Higher residential densities are to be pursued in urban areas with a greater emphasis on infill/brownfield, reduction in vacancies, area or site based regeneration and increased building heights (Objective 35).

Objective 36 of the NPF provides a commitment to introduce new statutory guidelines that will ensure consistency of approach, implementation and monitoring of housing requirements at a regional (Regional Spatial and Economic Strategies), metropolitan and local authority levels (Core Strategies).

The NPF also sets out measures and objectives to reconcile future housing requirements effectively. For this, key evidence inputs to inform and drive robust, evidence based Housing Need Demand Assessment (HNDA) Models that underpin local authority Housing Strategies are set out as follows:

- Demographic trends, affordability trends and wider economic trends.
- Housing Stock Profile Pressures (and existing need) and management issues.
- Estimating Future Housing Need and Demand.

Objective 37 sets out a requirement for Local Authorities to undertake HNDAs to form housing policies, strategies and land use zoning policies and to facilitate more informed decision making on investment programmes for housing. Furthermore, coordination and monitoring units are to be established to assist Local Authorities and Regional Assemblies in the development of the HDNA. This unit will also be responsible for a new centralised spatial database for Local Authority housing data that informs the development of the HNDAs.

Sustainable Urban Housing: Design Standards for New Apartments Guidelines for Planning Authorities

In March 2018 the Department of Housing, Planning and Local Government updated the guidelines relating to the Design Standards for New Apartments. These guidelines have been adopted in appreciation of the need to move towards higher density and more sustainable forms of living within Ireland's urban areas, to which apartment living is deemed essential. They also recognise the importance of the challenge in meeting the housing needs of a growing population in Ireland's key cities, thus following the direction of travel outlined in the National Planning Framework.

The guidelines state that County Development Plans must appropriately consider the need to both sustainably increase housing supply and to ensure that a greater proportion of housing development takes place within its existing built-up areas. However, they warn that while it has become practice for some statutory development plans to specify an across-the-board mix (types/sizes) in relation to the composition of individual apartment schemes, there is a need for greater flexibility with regard to approaches to apartment mix more generally. This is particularly relevant where a comprehensive housing need and demand assessment (HNDA) has not been undertaken. To this effect the following Specific Planning Policy forms part of the guidelines:

*Apartment developments may include up to 50% one-bedroom or studio type units (with no more than 20-25% of the total proposed development as studios) and there shall be no minimum requirement for apartments with three or more bedrooms. Statutory development plans may specify a mix for apartment and other housing developments, **but only further to an evidence based Housing Need and Demand Assessment (HNDA)**, that has been agreed on an area, county, city or metropolitan area basis and incorporated into the relevant development plan(s). (emphasis added)*

As such, the production of a Housing Needs Demand Assessment (HNDA) provides local authorities with an up to date and robust evidence base thus allowing them to appropriately determine and plan for the specific housing/apartment needs (including household compositions) within their administrative area covering the period of their statutory development plan.

Guidelines for Planning Authorities on Sustainable Residential Development in Urban Areas

In May 2009 these statutory guidelines were adopted in an effort to assist planning authorities, developers, architects and designers to deliver high quality residential developments. The aim of the guidelines was to set out the key planning principles that should be reflected in development plans and local area plans to guide the preparation and assessment of planning applications for residential developments in urban areas. Importantly, for the first-time specific guidance was provided on residential development for smaller towns and villages, acknowledging that different solutions are required to meet different scales and patterns of development. These guidelines state that through the preparation of development plans the following keys issues should be properly analysed and addressed:

- 1) Settlement Hierarchy
- 2) Urban Form
- 3) Anticipating Future Needs
- 4) Strengthening Community
- 5) Landscape Character

Rebuilding Ireland – Action Plan for Housing and Homelessness, 2016

The *Rebuilding Ireland: Action Plan for Housing and Homelessness* was published in July 2016. The Action Plan recognises issues around supply and affordability in Ireland’s housing sector and provides a multi-stranded approach to achieve key housing objectives up to 2021. These include an increase in the supply of social housing, increasing housing build numbers to services different tenures, and tackling homelessness. Actions to meet these objectives are organised under five pillars:

- Pillar 1: Address Homelessness
- Pillar 2: Accelerate Social Housing
- Pillar 3: Build More Homes
- Pillar 4: Improve the Rental Sector
- Pillar 5: Utilise Existing Housing.

Actions under Pillar 1 of the Action Plan are aimed at enhancing supports for homeless people and families, and alleviating an unacceptable level of families in emergency accommodation. Key actions include a Rapid-Build Housing Programme to expedite social housing supply, with a target of 1,500 rapid-delivery units by 2018, and enhanced Housing Assistance Payment (HAP) supports. In January 2016 rent limits were increased under the national Rent Supplement and HAP schemes, to provide greater security for tenants and families that are at risk of becoming homeless if their rent increases.

Pillar 2 of the Action Plan builds upon actions delivered under the Social Housing Strategy 2020. Published in 2014 the Social Housing Strategy set a commitment to deliver 35,000 new social housing units by 2020. The Action Plan increases this target to the delivery of 47,000 new social housing units over the period 2016-2021. It pledges enhanced support for existing initiatives for the delivery of social housing introduces the following new support schemes:

- **Local Authority Construction & Acquisition (also known as the Social Housing Investment Programme (SHIP))**
To provide funding to local authorities for the provision of social housing by means of construction and acquisition. It also covers expenditure under the Rapid Build Housing Programme, Part V acquisitions, Land Aggregation Scheme and the Special Resolution Fund for unfinished housing developments.
- **Capital Assistance Scheme (CAS)**
To provide essential funding to AHBs for the provision of accommodation for persons with specific categories of housing need such as Homeless and Older Persons, People with Disabilities, Returning Emigrants and Victims of Domestic Violence.
- **Vacant Housing Repair and Leasing Initiative**
This scheme enables local authorities, having identified appropriate vacant privately-owned properties in their functional areas, to provide upfront financial assistance to meet reasonable renovation works and to enter into long term lease arrangements with property owners. Renovation costs will be recouped from rent over an agreed period.
- **Part V Delivery**
The Action Plan sets out a commitment to ensure adequate resources are made available to both local authorities and Approved Housing Bodies, to allow them to purchase or lease newly built private dwellings to the fullest extent envisaged by Part V of the Planning and Development Act 2000. In addition, where appropriate, the leasing of additional privately developed dwellings beyond the extent envisaged by Part V is supported. Furthermore, the up-front purchase of the Part V social housing requirement will be facilitated, subject to the introduction of strict controls.

Significantly Pillar 3 of the Action Plan introduced measures for a stream-lined planning application process to allow applications for larger housing development schemes (comprising 100 units or more) to be made directly to An Bord Pleanála. These measures were given a legislative basis in the Planning and Development (Housing) and Residential Tenancies Act 2016 and now comprises the Strategic Housing Development Process. The process aims to speed up the planning decision making process, provide greater certainty to developers in terms of bringing schemes to market and ultimately to increase the supply of housing as efficiently as possible to address the current shortfall.

Pillar 4 of the Action Plan focuses on the rental sector and its growth in the overall tenure mix for Ireland's housing sector. A declining rate of home ownership, decreasing household size, a growing population influenced by high inward migration rates, and increasing rates of new household formation are all identified as factors pointing to the growth of the rental sector and the increased role it is likely to play into the future. The Action Plan notes that a strong rental sector supports a mobile labour market "*better able to adapt to new job opportunities and changing household circumstances*" and is suited to accommodating a range of households - including mobile professionals, students and indeed lower-income households.

Pillar 5 recognises that achieving optimum occupancy of both social and private housing stock is an effective way of meeting housing needs. It commits to the development of an overall national vacant housing re-use strategy, as well as introducing the following actions to ensure that our existing housing stock is utilised in an efficient manner to meet housing demand:

- **Better management of social housing stock**
A vacated social house should not remain vacant for an extended period. The refurbishment and re-letting of units between tenancies with minimal delay will be achieved through the adoption of a national re-letting performance standard across all local authorities, a preventative maintenance approach to housing stock management and funding mechanisms to incentivise the swift turnaround of units.
- **Choice-based letting**
Choice-based letting is a method used to allocate social housing in a manner that offers more choice and involvement for applicant households in selecting a new home. Local Authorities that have implemented such an approach have seen refusal rates drop, and so a choice-based allocation system will be introduced and implemented across all Local Authorities in a manner tailored to their specific circumstances.
- **Review of Tenant (Incremental) purchase**
The ongoing review of the Tenant (Incremental) Purchase Scheme in consultation with Local Authorities, to make the scheme more attractive for social housing tenants and help people who would otherwise struggle to buy a home to meet their home ownership ambitions.
- **Housing Agency Vacant Housing Purchase Initiative**
The Housing Agency will receive up to 70 million in capital funding to support the acquisition of suitable portfolios of vacant properties for social housing directly from financial institutions and investors.

National Vacant Housing Reuse Strategy 2018-2021

The National Vacant Housing Reuse Strategy was published in 2018 to support Pillar 5 of the Rebuilding Ireland: Action Plan for Housing and Homelessness. Drawing together policies and actions aimed at reducing vacancy in Ireland's housing stock it sets out the Strategic Objective of:

“ensuring that existing housing stock is used to the maximum degree possible – focusing on measures to use vacant stock to renew urban and rural areas.”

To accomplish this overall Strategic Objective the Strategy sets out a range of actions that will be implemented at a national and local level, grouped under five key objectives.

- **Objective 1 Establish robust, accurate, consistent and up-to-date data sets on vacancy.**
Includes actions aimed at securing an accurate picture of vacancy rates across different Local Authorities and identifying recoverable dwellings that can be re-introduced into the housing stock.
- **Objective 2 Bring forward measures to ensure, to the greatest degree possible, that vacant and underused privately owned properties are brought back to use**
Includes actions aimed at identifying and addressing barriers to bring private properties that are subject to long-term vacancies back into the housing stock.
- **Objective 3 Bring forward measures to minimise vacancy arising in Social Housing Stock.**
Includes actions for the effective management of our national social housing stock to ensure that vacant social houses do not remain vacant for extended periods of time.
- **Objective 4 Continued engagement with and provision of support to key stakeholders to ensure suitable vacant properties held by banks, financial institutions and investors are acquired for social housing use.**
Includes actions to ensure that the Housing Agency has adequate capital funding to acquire vacant properties from NAMA and other stakeholders for use as social housing.
- **Objective 5 Foster and develop cross-sector relationships, collaborating in partnership to tackle vacant housing matters.**

Includes actions to tackle vacancy in urban and rural areas such as the utilisation of the Urban Regeneration and Rural Regeneration Development Fund's and the rollout of a dedicated Urban Regeneration Scheme, as well as support partnerships between Government Departments and Local Authorities.

Social Housing Strategy 2020: Support, Supply and Reform

The Social Housing Strategy 2020: Support, Supply and Reform was adopted in November 2014 and sets out the framework for the delivery of new social housing and for social housing assessment, delivery and financing. The vision set out Strategy that *“every household in Ireland will have access to secure, good quality housing suited to their needs at affordable prices in a sustainable community”* applied to County Offaly is an overarching ambition of the Housing Strategy.

The national Social Housing Strategy is based on three pillars:

Pillar 1: Provide for 35,000 new social housing units, over a six-year period, to meet the additional social housing supply requirements as determined by the Housing Agency¹;

Pillar 2: Support up to 75,000 households through an enhanced private rental sector; and

Pillar 3: Reform social housing supports to create a more flexible and responsive system.

Phase 1 sets a target of 18,000 additional housing units and 32,000 HAP/RAS units by the end of 2017. Phase 2 sets a target of 17,000 additional housing units and 43,000 HAP/RAS units by end 2020.

The Strategy states that significant exchequer funding will be allocated to ensure that the early phases of the Strategy will deliver on the targets. An enhanced role for the Approved Housing Bodies (AHBs) is also a key component to deliver the vision.

The Strategy also states that a new tenant purchase scheme for existing local authority houses will be put in place. The development of an individual housing ‘passport’ that would facilitate tenant mobility between local authorities will be examined.

Exchequer funding commitment of €5.7bn over the lifetime of the Strategy has been made by Government, and Offaly County Council expects to spend in excess of €200 million from this fund in the delivery of its Social Housing Programme 2017 to 2019.

Construction 2020: A Strategy for a Renewed Construction Sector

Construction 2020 was published by the Government in 2014 and sets out a detailed, time-bound set of actions to support the return of Ireland’s construction sector to sustainable levels. The vision is that Ireland will have a competitive, innovative, dynamic, safe and sustainable construction sector; one that makes its full and proper contribution to the economy and to job creation, and one that is based on best practice and capable of delivering the economic and social infrastructure we need to build to sustain a prosperous future.

¹ Increased to 47,000 units in *Rebuilding Ireland – Action Plan for Housing and Homelessness, 2016*

Some of the key commitments include:

- Putting in a place a National Framework for Housing Supply and an Annual Statement of Projected Housing Supply and Demand;
- Establishing a Housing Supply Coordination Task Force for Dublin;
- Assessing existing construction and property data sources for appropriateness including identifying any gaps and quality shortcomings;
- Examining the key barriers to housing mobility and make recommendations to Government;
- Developing a national policy towards professionalising the private rental sector;
- Establishing a working group and invite public comment on the feasibility and impact of setting minimum thermal efficiency performance standards in rental properties;
- Publishing a Social Housing Strategy and introducing legislation to regulate the Approved Housing Body sector;
- Review of Part V requirements;
- Publishing of the Homelessness Implementation Plan and implementation of the key recommendations of the Homelessness Oversight Group's First Report in Q2 2016;
- Continuing to implement the Government Action Programme on Unfinished Housing Developments and the Budget 2014 Special Resolution Fund.

The National Housing Strategy for People with a Disability 2011-2016

The National Housing Strategy for People with a Disability 2011-2016 sets out a framework of initiatives to provide for the housing needs of vulnerable and disadvantaged households. The strategy has nine strategic aims:

- To promote and mainstream equality of access for people with a disability to the full range of housing options available suited to individual and household need.
- To develop national protocols and frameworks for effective interagency cooperation which will facilitate person-centred delivery of housing and relevant support services.
- To support people with a disability to live independently in their own homes and communities, where appropriate.
- To address the specific housing needs of people with an intellectual and/or physical disability, moving from congregated settings in line with good practice, including through the development of frameworks to facilitate housing in the community.
- To address the specific housing needs of people with a mental health disability, including through the development of frameworks to facilitate housing in the community, for people with low and medium support needs moving from mental health facilities, in line with good practice.
- To consider good practice in the design, coordination and delivery of housing and related supports.
- To facilitate people with a disability to access appropriate advice and information in respect of their housing needs.
- To improve the collection and use of data/information regarding the nature and extent of the housing needs of people with a disability.
- To provide a framework to support the delivery, monitoring and review of agreed actions.

2.2 Regional Policy

The Regional Spatial and Economic Strategy (RSES) 2019-2031

The Regional Spatial and Economic Strategy (RSES) for the Eastern and Midland region came into force in June 2019, superseding the Regional Planning Guidelines for the Midland Region. The RSES is a high-level plan that seeks to support the implementation of the NPF by providing a strategic planning and economic framework for the region's sustainable growth and development. It echoes the NPF in emphasising sustainable development patterns and seeks to focus growth within the footprint of existing urban areas and in key regional growth settlements.

The RSES seeks to determine at a regional scale how best to achieve the shared goals set out in the National Strategic Outcomes (NSOs) of the NPF. To this end, the Strategy sets out 16 Regional Strategic Outcomes (RSOs), which are aligned with international, EU and national policy and which in turn set the framework for city and county development plans.

The RSES also sets out Regional Policy Objectives to support Local Authorities in completing Housing Need Demand Assessments as required under the NPF and to provide for a diverse range of housing types and tenures. The strategy seeks to *“Support local authorities, approved housing bodies and other sectoral agencies in the provision of a greater diversity of housing type and tenure, including social and affordable housing and exploring new models of low-cost rental and affordable homeownership”*.

In relation to Offaly, the Settlement Strategy for the region designates Tullamore as a Key Town. The designation of this settlement under the Settlement Strategy for the region and relevant Regional Policy Objectives has helped inform the Housing Strategy for Offaly.

2.3 Local Policy

Offaly County Housing Strategy 2014-2020

The Offaly County Housing Strategy 2014-2020 provided a comprehensive review of demographics and housing demand within County Offaly to inform the Offaly County Development Plan 2014-2020. It projected need for the planning provision of housing, as well as the demand for social and affordable housing within the County based on data from the 2011 census and regional population targets.

The housing strategy acknowledged that there would be a need for social housing provision and advocated for the implementation of Part V requirements of 20% in all new housing schemes subject to the type and location of the housing units required by the planning authority at a given time.

Offaly Local Economic and Community Plan 2016-2021

The Offaly Local Economic and Community Plan (LECP) 2016-2021 was completed to meet provisions under the Local Government Reform Act 2014. It is an action-focused plan whose purpose is to identify and implement actions to achieve sustainable economic growth and improved social outcomes within the County. A series of LECP objectives and actions to achieve these ambitions are set out throughout the plan.

County Offaly Age Friendly Strategy 2018-2021

The Offaly Age Friendly Strategy 2018 -2021 was developed by the Age Friendly Alliance following an extensive consultation with older people throughout the county. The ultimate aim of the Age Friendly County Programme is to make Offaly a county in which;

- Older people are supported to influence the decisions that impact their lives

- Older people can exercise autonomy in relation to the systems, services and decisions which affect them
- There is real respect for older people and their contribution to the county and the communities in which they live is fully valued
- Older people are supported to live independently for as long as they wish to
- Older people experience excellent quality of life
- Better integration of services reduces dependency and avoidable duplication and costs

In achieving this overall vision, eight themes and associated priorities have been established based on the Age Friendly Ireland (AFI) Programme. These themes cover for example, Housing, Transport, Social Participation, Outdoor Spaces and Buildings.

Offaly County Council Traveller Accommodation Programme 2019-2024

The Offaly County Council Traveller Accommodation Programme (TAP) 2019-2024 fulfils requirements under the Housing (Traveller Accommodation) Act 1998. Having come into effect in 2000 the Act requires Local Authorities to prepare and adopt a Traveller Accommodation Programme for each succeeding five-year period. It aims to meet the accommodation needs of travellers in Offaly within a five-year period up to 2024. The Programme recognises Traveller's ethnic identity and aims to provide accommodation that is suitable to their specific needs. As such, the Programme provides for standard housing options, as well as traveller-specific accommodation such as halting sites, temporary/emergency sites and one-off rural houses. As policy, different housing options will be provided in accordance with an assessment of need and are subject to feasibility.

3.0 Current Context: Review and Analysis of Existing Supply and Needs

3.1 Population

Census 2016 results show that Ireland's population stood at 4,761,865 in April 2016, an increase of 173,613 (3.8%) since April 2011. There were 200 urban settlements across the country, which together accommodated 63% of Ireland's population. County Offaly is located within the Eastern and Midland Regional Assembly area, the most populous region in the state with over 2.3 million people. Recent trends show that population growth is set to continue having regard to the Region's young demographic profile and a return to net inward migration as the Country returns to economic growth after a severe economic crash in 2008. A brief overview of the county's population shows that the county saw a population increase of 1.66% (+1,274 persons) between 2011 and 2016, as the population increased to 77,961 from 76,687. As the Key Town within the County Offaly settlement hierarchy Tullamore experienced a rate of growth slightly higher than the county average between 2011 and 2016, with the population increasing by 1.63%. Population change across the various settlements identified in the settlement hierarchy is set out in Table 3.1.

Table 3.1: Population Growth in Offaly 2011-2016

County	2011	2016	2011-2016 Growth Rate %
County Offaly	76,687	77,961	1.63
Settlement			
Tullamore	14,361	14,607	1.71
Birr²	4,428	4,370	-1.3
Edenderry	6,977	7,359	5.48
Portarlinton (County Offaly)	1,678	1,772	5.6
Clara	3,242	3,336	2.90
Ferbane	1,165	1,191	2.23
Banagher	1,653	1,760	6.47
Daingeen	1,037	1,077	3.86
Kilcormac	870	935	7.47
Ballinagar	420	453	7.86
Ballycumber	219	208	-5.02
Belmont	209	200	-4.31
Bracknagh³	-	212	-
Cloghan	612	601	-1.80
Clonbullogue	422	439	4.03
Cloneygowan	190	198	4.21
Coolderry³	-	85	-
Geashill	375	395	5.33

² CSO Settlement boundary change from 2011 to 2016

³ CSO 2011 Data Unavailable

Killeigh	197	212	7.61
Kinnitty	359	381	6.13
Moneygall	310	313	0.97
Mountbolus⁴	-	129	-
Mucklagh	810	826	1.98
Pollagh / Lemanaghan	251	227	-9.56
Rhode	778	811	4.24
Riverstown⁴	-	39	-
Shannon Harbour⁴	-	52	-
Shannonbridge	206	175	-15.05
Shinrone	634	645	1.74
Walsh Island	458	443	-3.28
Sraids and Open Countryside	31,988	33,828	5.75

The population distribution across urban and rural areas in County Offaly remained consistent between 2011 and 2016. According to the CSO's parameters, a total of 31,475 people (40.6%) were living in urban settlements in Offaly in 2016. 46,486 (59.4%) were living in smaller towns and villages, as well as in the rural remainder of the county. In 2011, census results showed a distribution between the urban and rural population as 40% and 60% respectively. Thus, the negligible increase in urban living in County Offaly did not keep pace with the prevailing state-wide trend of urbanisation in Ireland, where 80% of the population increase (173,613) in the state was in urban areas.

The age profile of the EMRA region in 2016 was relatively young with nearly half a million children or 1 in 5 people (22%) in the Region aged under 14 years of age. In Offaly this figure is broadly similar, standing at 22.7%. Census 2016 results show that Ireland's population has been getting steadily older since the 1980s. In 2016, 37.2% of the Irish population were aged 45 and over, compared with 34.4% in 2011 and 27.6% in 1986. 13.4% of the state's population were over 65 in 2016. As with the state, both the EMRA region and county of Offaly are ageing. As the RSES notes, by 2031 there will be a significant increase in the regional population aged over 65 and as such, there is a need to plan for adequate healthcare, accommodation and services to enable independent living for as long as possible, encourage active lifestyles and address isolation for older residents.

⁴ CSO 2011 Data Unavailable

Table 3.2: Age Dependency Ratios (2016)

County	0-14 years	15-64 years	Over 65 years	Young Age Ratio (%)	Old Age Ratio (%)	Total Dependency Ratio (%)
County Offaly	17,727	49,643	10,591	22.7%	14%	36.3%
MD						
MD Birr	5,297	16,085	4,094	21%	16%	36.9%
MD Tullamore	6,685	18,643	3,831	23%	13%	36.1%
MD Edenderry	5,745	14,915	2,666	25%	11%	36.1%

In total, the number of children of pre-school age (0-4) in Offaly is 5,631 (7.2%). 9,733 (12.5%) are of primary school going age (5-12) and a further 6,896 (8.3%) are of secondary school going age (13-18). An extended age profile of the county is presented in Figure 3.1 below.

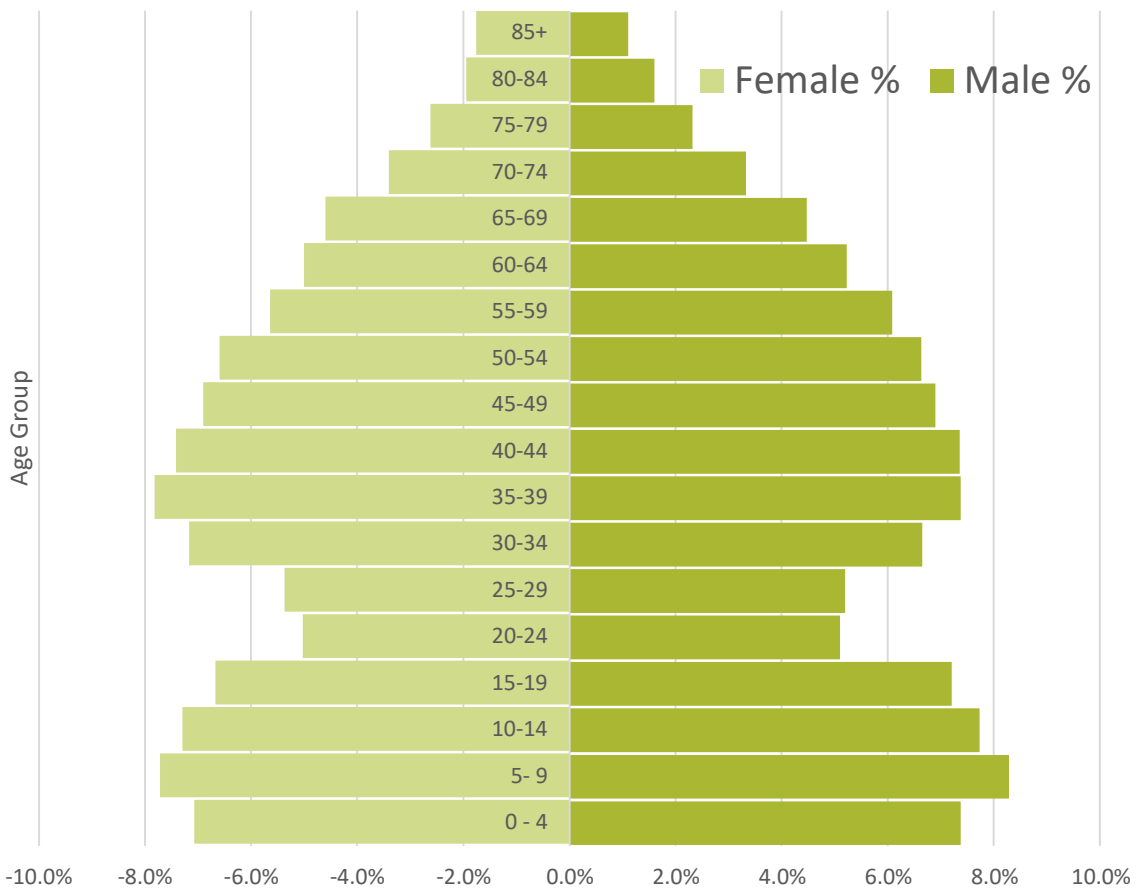


Figure 3.1: Age Dependency Ratios % (2016)

3.2 Existing Housing Stock and Supply

3.2.1 Stock and Composition

Census 2016 results record a total housing stock of 30,740 units in County Offaly, which represents a marginal decrease of 10 units on 2011 levels (30,750 in 2011). The number of vacant units in 2016 stood at 2,640 (excluding holiday homes and those dwellings deemed to be temporarily absent). The 2011 Census data does not distinguish between categories of vacancy and indicates that there were 4,120 unoccupied dwellings in 2011. In contrast, the 2016 data illustrates the number of temporarily absent dwellings, unoccupied holiday homes and other vacant dwellings. For comparison purposes, the total number of vacant dwellings across these three categories in 2016 is 3,480. As such, there is an overall decline in the number of vacant dwellings of 640 between 2011-2016. This indicates the existing vacant stock is absorbing much of the growing need for housing in the county. A summary of the information on the existing housing stock is provided in

The proportional breakdown of housing tenures, privately owned, privately rented and publicly rented accommodation in the three Municipal Districts of Birr, Tullamore and Edenderry is set out in Table 3.5. As can be seen home ownership in Tullamore MD is below the County average at 67.3% while privately rented (17%) and social housing i.e. rented from the Local Authority and rented from voluntary bodies (11%) are above the county average. Home ownership is highest (77%) in Edenderry MD where social housing provision is also at its lowest (8%).

Table 3.6 Household Tenure – Occupancy Type County Offaly and Municipal Districts 2016

County Offaly	Owner occupied with mortgage	Owner occupied no mortgage	Rented from private landlord	Rented from Local Authority	Rented from voluntary body	Occupied free of rent	Not stated	Total
(No. households)	8,973	10,920	3,721	2,206	251	467	646	27,184
% Households	33%	40%	14%	8%	1%	2%	2%	100%
MD Birr								
(No. households)	2,703	4,266	988	730	47	193	199	9,126
% Households	30%	47%	11%	8%	1%	2%	2%	100%
MD Tullamore								
(No. households)	3,168	3,695	1,752	948	163	155	313	10,194
% Households	31%	36%	17%	9%	2%	2%	3%	100%
MD Edenderry								
(No. households)	3,102	2,959	981	528	41	119	134	7,864
% Households	39%	38%	12%	7%	1%	2%	2%	100%

.2.

Table 2.3: Existing Housing Stock (2016)

County	Housing stock	Holiday homes	Other vacant	Temporarily Absent	Total vacancy	% Vacancy ⁵
Offaly County	30,740	244	2,640	596	2,640	8.6%
MD						
MD Birr	10,629	138	1,161	177	1,161	10.9%
MD Tullamore	11,358	71	778	287	778	6.8%
MD Edenderry	8,753	35	701	132	701	8.0%

Household size cohort represents the number of people per households. Almost half of households in Offaly in 2016 had just one or two persons living in that household as illustrated Table 3.3, however this generally compares to the national figures on household size cohorts.

Table 3.4: Existing Household Size Cohorts (2016)

County Offaly	Households	Persons	Households %	Persons %
1 person	5,970	5,970	21.8%	7.7%
2 persons	7,546	15,092	27.6%	19.4%
3 persons	4,867	14,601	17.8%	18.8%
4 persons	4,836	19,344	17.7%	24.9%
5+ persons	4,124	22,748	15.1%	29.3%
Total	27,343	77,755	100.0%	100.0%



Figure 3.2: Existing Household Size Cohorts % (2016)

⁵ The percentage vacancy rate provided is based on 'Other Vacancy' category as a percentage of total housing stock and excludes vacant holiday homes and those temporarily absent.

Compositionally, there were 27,343⁶ households and an average household size of 2.84, which is higher than the national rate of 2.75. An assessment of average household Size through historic censuses that occurred during 1981 – 2016, indicated that there has been an annualised rate of decline of 0.74% in average household size over this period, which is slightly higher than the national average of 0.71%. 94.3% of households comprised of a house or bungalow while 3.5% were apartments in 2016. At a national level, 12% of all occupied households in Ireland were apartments. The NPF notes that while the overall proportion of households living in apartments is growing, we remain considerably behind European averages in terms of the numbers and proportion of households living in apartments, especially in our cities and larger towns. As such, the NPF states that apartments will need to become a more prevalent form of housing, particularly in Ireland’s cities in order to more effectively address the challenge of meeting the housing needs of a growing population in our key urban areas.

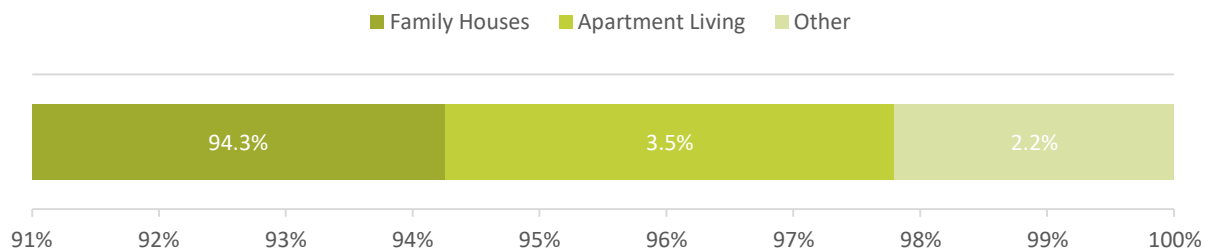


Figure 3.3: Existing Household Typology % (2016)

3.3.2 Housing Tenure

Home ownership remains the dominant tenure in Offaly with 73.2% of households within this category in 2016. 40% of households pay a mortgage. 13.7% of households were in the private rental market, while 9.0% (2,457) of rented properties comprise social housing, a marginal increase of 1% since 2011. Table 3.4 provides a concise illustration of housing tenures across Offaly County.

Table 3.5: Housing Tenure County Offaly (2016)

County Offaly	Households	Persons	Households %	Persons %
Social Housing	2,457	7,114	9.0%	9.2%
Rented (Privately)	3,721	10,341	13.7%	13.4%

⁶ CSO 2016 – Including Caravan/Mobile Home as a household

Owner Occupied (All)	19,893	57,331	73.2%	74.1%
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The proportional breakdown of housing tenures, privately owned, privately rented and publicly rented accommodation in the three Municipal Districts of Birr, Tullamore and Edenderry is set out in Table 3.5. As can be seen home ownership in Tullamore MD is below the County average at 67.3% while privately rented (17%) and social housing i.e. rented from the Local Authority and rented from voluntary bodies (11%) are above the county average. Home ownership is highest (77%) in Edenderry MD where social housing provision is also at its lowest (8%).

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(No. households)	3,102	2,959	981	528	41	119	134	7,864
% Households	39%	38%	12%	7%	1%	2%	2%	100%

3.3.3 Unfinished Housing Development

The 2017 National Housing Development Survey which tracks progress on unfinished housing developments since 2010 indicates that there were 7 unfinished housing developments in County Offaly forming part of the 2017 survey. However, following the inspection of these 7 unfinished housing development sites in 2017, a further reduction in unfinished housing developments (42.9%) was achieved, leaving a remaining 4 sites to be brought forward to 2018. A total of 46 units are spread across these 4 sites. Of the 46 units, 32.6% are occupied and 10.9% are nearing completion as set out in Table 3.6.

Table 3.7 Unfinished Housing Developments (Source: DHPLG 2017)

Status	Number of Units
Occupied	15
Vacant	8

Near Complete	5
Partially constructed (to wall plate, DPC or foundations)	18
Not started	0
Planning Expired	0
All units	46

3.3.4 Housing Permissions

Table 3.7 illustrates the number of granted planning applications in County Offaly between 2006 and 2019. 72.2% of these relate to permissions granted for houses and apartment via development scheme applications, while 27.8% relate to single one-off dwellings in the open countryside'. The yearly average of single one-off dwellings granted planning permission over the 2006-2019 period is 54.62%. A more a specific analysis focusing on the last two years (2018-2019) indicates that on average, 33% of the total number of residential units granted have been for single one-off dwellings.

Table 3.8 Granted Planning Applications in County Offaly between 2006 and 2019

Granted Planning Applications	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Grand Total	Average % '06-'19
Houses and Apartments #	1,799	1,652	1,466	371	32	95	5	7	11	12	8	186	297	287	6,228	-
Single One-Off Dwellings #	422	513	374	173	101	103	59	43	73	69	78	105	133	154	2,400	-
Houses and Apartments % of Total	81.0%	76.3%	79.7%	68.2%	24.1%	48.0%	7.8%	14.0%	13.1%	14.8%	9.3%	63.9%	69.1%	65.1%	72.2%	45.31%
Single One-Off Dwellings % of Total	19.0%	23.7%	20.3%	31.8%	75.9%	52.0%	92.2%	86.0%	86.9%	85.2%	90.7%	36.1%	30.9%	34.9%	27.8%	54.69%
Total #	2,221	2,165	1,840	544	133	198	64	50	84	81	86	291	430	441	8,628	-
Total %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	-

3.3.5 Social Housing Stock

In accordance with Section 9 of the Housing Act 1988, housing authorities are required to undertake an assessment of housing need in their administrative area. The social housing stock of Offaly as of March 2020 is as follows:

Table 3.9 Current Social Housing Stock (March 2020)

	County Offaly
Housing Stock (directly owned by Offaly CC)	1,895
Rental Accommodation Scheme (RAS) or other Leasing Programme	310
Housing Assistance Payment (HAP) Units	857
Approved Housing Body (AHB) Units	514
Total	3,576

3.3.5.1 Approved Housing Bodies – AHB’s

AHB’s also provide social housing and are formed for the purpose of relieving housing need and the provision and management of housing. They are established by a voluntary management board to benefit the community in which they are based, and are approved and funded by the Department of Housing, Planning and Local Government. Housing cooperatives can provide both social rented housing and housing to purchase. Housing cooperatives are self-help and jointly owned member/user housing associations or societies. Projects undertaken may be in response to the needs of the elderly, people with disabilities, homeless persons or families and single people on low incomes. Some housing associations may be formed to specialise in meeting a particular housing need, others develop with broader aims. The specific housing services offered will depend on the aims or concerns of the members, the needs of tenants as well as the financial and other resources available for both capital costs and ongoing management running costs.

In December 2019, DHPLG issued a Circular (Housing Circular 40/2019) directing all local authorities to commence the establishment of a **Local Authority and Approved Housing Body Housing Delivery Forum** to represent their local authority area. This Circular followed a series of consultations events with local authorities and AHBs as well as detailed engagement with the CCMA Housing and Building Committee and the Irish Council for Social Housing. The overall objective is for each local authority to establish a local AHB forum to involve the key AHBs that are active in its area. The key concerns to be considered by the AHB forum are as follows:

- Agree and implement a Protocol for local authority/AHB engagement on the Delivery of Housing
- Review delivery targets under Rebuilding Ireland to monitor delivery and identify opportunities
- Agree and implement a Protocol to co-ordinate the provision of the additional support services available from those AHBs that work with households experiencing acute issues (homelessness, disability etc)
- To monitor and improve operational issues including the allocation process, agreeing rents etc
- Bring to the attention of the Department/CCMA/national AHB Forum, strategic or national issues that require agreement or solutions at the Departmental/CCMA level

3.3.5.2 Social Housing Vacancy

There are 50 vacant social housing units in County Offaly (March 2020). The majority of the vacant units are in varying stages of being re-let; with maintenance, under offer, accepted, refused. There are no long-term vacancies.

4 Housing Needs in Offaly

The determination of housing need and supply over the operational period of the development plan is a fundamental cornerstone of the Housing Strategy. Having reviewed and analysed the existing needs and supply in Section 3, it is now necessary to project and determine the future housing requirements to cover the plan period between 2021-2027.

4.1 Determination of Annual Population Projections

Purpose: This is the determination of annual population that has been projected over the plan period.

A number of population scenarios for County Offaly have been investigated to 2031 and a ‘Policy-Intervention Scenario’⁷ has been applied for the purpose of this analysis into the counties housing needs. In accounting for the NPF population growth targets, an interpolation of the required level of change per annum was developed for County Offaly from baseline year 2016 to NPF target years 2026 and 2031; thus producing annualised figures between the 2021 and 2027 **lifetime** of the plan.

Using this scenario, the projected growth in population over the plan period is identified in Table 4.1. This sets out that the population of County Offaly will increase by 5,823 people during the plan period to a total of 87,200 people in 2027.

Table 4.1: Projected population growth over the plan period

Year	Total Population in County Offaly	Annual Percentage Increase	Annual Population Increase During Year	Total Population Increase 2021-2027	Total Population Increase 2016-2027
2006	70,868	-	-	-	-
2011	76,687	8.2%	-	-	-
2016	77,961	1.7%	-	-	-
2017	78,815	1.1%	854	-	-
2018	79,669	1.1%	854	-	-
2019	80,523	1.1%	854	-	-
2020	81,377	1.1%	854	-	-
2021	82,231	1.0%	854	-	-
2022	83,084	1.0%	854	-	-
2023	83,938	1.0%	854	-	-
2024	84,792	1.0%	854	-	-
2025	85,646	1.0%	854	-	-
2026	86,500	1.0%	854	-	-
2027	87,200	0.8%	700	5,823	9,239

⁷ A series of population scenarios were explored ranging from a purely demographic outlook (‘Non-Intervention’) to various intervention scenarios, more closely aligned with policy-based targets. This intervention scenario has been determined based on the interpolation between 2016 Census and population targets as set out in the NPF.

4.2 Determination of Average Household Size and Additional Household Requirements

Purpose: This is the determination of annual household increase based on the application of an average household size for the projected population.

The Census 2016 results indicate that Offaly had a population to household ratio of 2.84 which is higher than the state average of 2.75. However, the NPF states that this is expected to decline to around 2.5 by 2040, while also acknowledging that household sizes in urban areas tend to be smaller than in the suburbs or rural parts of the country. Analysis of historic trends has undertaken to determine the evidence-based graduated reduction in average household size⁸ within this plan to 2040. As shown in Table 4.2, the average household size is thus projected to be 2.62 at the end of the plan period.

By applying the relevant household size to projected population increases, it is possible to forecast required household numbers to the end of the plan period. As summarised in Table 4.2, the number of households in County Offaly is expected to increase from 27,343 in 2016. This will increase by 3,803 houses during the plan period, equating to a total of 33,286 in 2027, or the equivalent of 543 units per annum on average.

Table 4.2: Projected households over the plan period

Year	Total Population in County Offaly	Number of Households (Private)	Average Household Size in County Offaly	No. of Anticipated Houses Per Annum	Total Anticipated Houses - 2021-2027	Average Anticipated Houses Per Annum between 2021-2027
2006	70,868	-	-	-	-	-
2011	76,687	-	-	-	-	-
2016	77,961	27,343	2.84	-	-	-
2017	78,815	27,923	2.82	580	-	-
2018	79,669	28,437	2.80	514	-	-
2019	80,523	28,957	2.78	520	-	-
2020	81,377	29,483	2.76	526	-	-
2021	82,231	30,015	2.74	532	-	-
2022	83,084	30,554	2.72	539	-	-
2023	83,938	31,099	2.70	545	-	-
2024	84,792	31,650	2.68	551	-	-
2025	85,646	32,208	2.66	558	-	-
2026	86,500	32,773	2.64	565	-	-
2027	87,200	33,286	2.62	512	3,803	543

⁸ The Average Household Size was examined in the historic Censuses that occurred during 1981 – 2016. From this, an annualised rate of decline of 0.74% in average household size was determined (which is slightly higher than the national average of 0.71%. This rate has been applied to the average household size for County Offaly from the 2016 Census to establish the trend adjusted average household size that has been projected during the plan period.

4.3 Calculation of Estimated Distribution of Household Disposable Incomes

Purpose: This is the calculation of estimated distribution of annual and weekly household disposable income per decile of the established (by the CSO) household deciles in the baseline year.

Disposable income is the amount of income, after tax is deducted, that is available to a household or individual for spending and saving. It functions as an important measure of housing affordability⁹ in an area i.e. the ability of a household to purchase their own home.

This calculation has been based on the weekly and annual disposable household incomes at national level from the CSO's Household Budget Survey (from 2015-2016). These national incomes have been adjusted to county level based on application of "inflator/deflator" rate. A deflator¹⁰ of 0.826 has therefore been applied to County Offaly based on CSO report on County Incomes and Regional GDP from 2016 (i.e. the baseline year at the time of the survey).

Table 4.3 illustrates the outputs of this exercise, with findings disaggregated into ten income segments or 'deciles' and applied to the proportion of households within each decile. This indicates that in 2017 after taxes, about one third of the households in County Offaly have an average annual disposable income of €20,321, or the equivalent of €390.79 per week.

⁹ Section 93 of the Planning and Development Act 2000, defines 'affordability' as "a person who is in need of accommodation and whose income would not be adequate to meet the payments of a mortgage for the purchase of a house to meet his or her accommodation needs because the payments calculated over the course of a year would exceed 35% of that person's annual income net of income tax and pay related social insurance..."

¹⁰ The measure of price inflation/deflation in an area, relative to the national measure at that time.

Table 4.3: Calculation of the distribution of disposable household incomes (annual and weekly) during the baseline year

Income Range	Average Weekly Disposable Income (State) (€) (2009-2010)	Average Weekly Disposable Income (State) (€) (2015-2016)	Percentage Change from 2009-2010 to 2015-2016	Assumed Annual Percentage Income Increase from 2010 to 2016	Adjusted Average Weekly Disposable Income (State) (€) (2017)	Percentage of Households in Each Category (State)	Average Annual Disposable Income (State) (€) (2017)	Offaly County Deflator	Offaly Average Annual Disposable Income (€) (2017)	Number of Households in County Offaly (2016)
1st Decile	188.91	197.40	4.5%	0.90%	199.17	9.83%	10,357.06	0.826	8,550.93	2,687
2nd Decile	300.98	324.40	7.8%	1.56%	329.45	10.57%	17,131.32	0.826	14,143.84	2,891
3rd Decile	431.28	465.86	8.0%	1.60%	473.33	10.47%	24,613.19	0.826	20,320.97	2,863
4th Decile	549.20	593.56	8.1%	1.62%	603.15	10.44%	31,363.73	0.826	25,894.30	2,855
5th Decile	669.46	725.85	8.4%	1.68%	738.08	10.25%	38,380.05	0.826	31,687.07	2,803
6th Decile	802.56	865.88	7.9%	1.58%	879.54	9.94%	45,736.24	0.826	37,760.44	2,719
7th Decile	972.03	1,026.46	5.6%	1.12%	1,037.96	9.62%	53,973.69	0.826	44,561.38	2,631
8th Decile	1,183.82	1,215.55	2.7%	0.54%	1,222.07	9.65%	63,547.44	0.826	52,465.59	2,639
9th Decile	1,472.66	1,473.25	0.0%	0.01%	1,473.37	9.61%	76,615.14	0.826	63,254.45	2,627
10th Decile	2,289.38	2,229.05	-2.6%	-0.53%	2,217.30	9.62%	115,299.70	0.826	95,192.93	2,631
Total			5.0%	1.0%		100.00%				27,343

4.4 Calculation of Average Annual Household Disposable Income Distribution

Purpose: This is the calculation of estimated distribution of annual household disposable incomes for each of the 10 household deciles throughout the plan period.

To inform the forward projection of affordability in County Offaly during the plan period, the baseline figures have been inflated annually using forecasted growth rates in relation to Gross Domestic Product (GDP). The forecasted GDP rates have considered the estimated distribution of household disposable incomes for 2016 from the CSO's Household Budget Survey and been determined based on historic and the latest forecasted GDP growth rates during the plan period (from the Department of Finance¹¹, Central Bank¹², ESRI¹³ and European Union¹⁴).

Based on the current economic outlook, GDP growth of 8.2% and 6% was considered during 2018 and 2019 respectively whilst 3.1% is expected during 2020 and 2021 and 2.9% GDP growth has been conservatively applied thereafter. The key outputs of this are shown in **Table 4.4** which highlights a notable difference in average annual disposable incomes across each of the 10 deciles for each year during the plan period.

Table 4.4: Calculation of Average Annual Household Disposable Income Distribution (€) in County Offaly

	2021	2022	2023	2024	2025	2026	2027
% Growth	3.1%	2.9%	2.9%	2.9%	2.9%	2.9%	2.9%
1st Decile	10,425	10,727	11,038	11,358	11,688	12,027	12,375
2nd Decile	17,243	17,743	18,258	18,787	19,332	19,893	20,470
3rd Decile	24,774	25,492	26,232	26,992	27,775	28,581	29,409
4th Decile	31,569	32,484	33,426	34,395	35,393	36,419	37,475
5th Decile	38,631	39,751	40,904	42,090	43,311	44,567	45,859
6th Decile	46,035	47,370	48,744	50,157	51,612	53,109	54,649
7th Decile	54,326	55,902	57,523	59,191	60,907	62,674	64,491
8th Decile	63,962	65,817	67,726	69,690	71,711	73,791	75,931
9th Decile	77,115	79,352	81,653	84,021	86,458	88,965	91,545
10th Decile	116,053	119,418	122,881	126,445	130,112	133,885	137,768

4.5 Calculation of Average Monthly Household Disposable Income Distribution

Purpose: This is the calculation of estimated distribution of monthly household disposable incomes for each of the 10 household deciles throughout the plan period.

This has been based on the same information as outlined above (i.e. Calculation of Average Annual Household Disposable Income Distribution) and scaled to provide the monthly (rather than annual) estimates of disposable income per household in each decile as described in Table 4.5.

¹¹ Department of Finance (2020) Monthly Economic Bulletin: February 2020.

¹² Central Bank of Ireland (2020) Quarterly Bulletin : QB1 – February 2020.

¹³ The Economic and Social Research Institute (2020) Quarterly Economic Commentary – Winter 2020

¹⁴ European Union (2020) Winter 2020 Economic Forecast: Offsetting forces confirm subdued growth

Table 4.5: Calculation of Average Monthly Household Disposable Income Distribution (€) in County Offaly

	2021	2022	2023	2024	2025	2026	2027
% Growth	3.1%	2.9%	2.9%	2.9%	2.9%	2.9%	2.9%
1st Decile	869	894	920	947	974	1,002	1,031
2nd Decile	1,437	1,479	1,521	1,566	1,611	1,658	1,706
3rd Decile	2,064	2,124	2,186	2,249	2,315	2,382	2,451
4th Decile	2,631	2,707	2,786	2,866	2,949	3,035	3,123
5th Decile	3,219	3,313	3,409	3,507	3,609	3,714	3,822
6th Decile	3,836	3,947	4,062	4,180	4,301	4,426	4,554
7th Decile	4,527	4,658	4,794	4,933	5,076	5,223	5,374
8th Decile	5,330	5,485	5,644	5,808	5,976	6,149	6,328
9th Decile	6,426	6,613	6,804	7,002	7,205	7,414	7,629
10th Decile	9,671	9,952	10,240	10,537	10,843	11,157	11,481

4.6 Determination of Distribution of Total Anticipated Households

Purpose: This is the calculation of estimated distribution of total household units for each of the 10 household deciles throughout the plan period.

The number and distribution of total households per decile throughout the plan period has been estimated from the distribution of housing units in the State from the Household Budget Survey¹⁵. This has been reflected upon in order to determine the projected number of private households per decile per year during the plan period. Specifically, this has been based on the outputs of Step 2 (i.e. Determination of Average Household Size and Additional Households Required) in relation to number of private households per year during the plan period as well as the distribution of housing units in the State from the Household Budget Survey. **Table 4.6** identifies the distribution of total households across each of the ten deciles during the plan period.

Table 4.6: Distribution of total households per decile (No. Households) in County Offaly

	2021	2022	2023	2024	2025	2026	2027
1st Decile	2,949	3,002	3,056	3,110	3,165	3,220	3,271
2nd Decile	3,173	3,230	3,288	3,346	3,405	3,465	3,519
3rd Decile	3,142	3,199	3,256	3,314	3,372	3,431	3,485
4th Decile	3,134	3,190	3,247	3,304	3,363	3,422	3,475
5th Decile	3,077	3,132	3,188	3,244	3,301	3,359	3,412
6th Decile	2,984	3,038	3,092	3,147	3,202	3,259	3,310
7th Decile	2,888	2,940	2,992	3,045	3,099	3,153	3,202
8th Decile	2,897	2,949	3,001	3,054	3,108	3,163	3,212
9th Decile	2,883	2,935	2,988	3,041	3,094	3,148	3,198
10th Decile	2,888	2,940	2,992	3,045	3,099	3,153	3,202
Total	30,015	30,554	31,099	31,650	32,208	32,773	33,286

¹⁵ CSO (2017) Household Budget Survey 2015-2016 - Table HS029: Households in sample by deciles and year.

4.7 Determination of Distribution of Additional Anticipated Households

Purpose: This is the calculation of estimated distribution of additional anticipated household units for each of the 10 household deciles throughout the plan period.

Similarly to the preceding step, the number of additional anticipated households per decile has been estimated throughout the plan period. Table 4.7 identifies the distribution of additional anticipated households across each of the ten deciles during the plan period.

Table 4.7: Distribution of additional households per decile (No. Households) in County Offaly

	2021	2022	2023	2024	2025	2026	2027
1st Decile	52	53	54	54	55	55	50
2nd Decile	56	57	58	58	59	60	54
3rd Decile	56	56	57	58	58	59	54
4th Decile	56	56	57	58	58	59	54
5th Decile	55	55	56	57	57	58	53
6th Decile	53	54	54	55	55	56	51
7th Decile	51	52	52	53	54	54	49
8th Decile	51	52	53	53	54	54	49
9th Decile	51	52	52	53	54	54	49
10th Decile	51	52	52	53	54	54	49
Total	532	539	545	551	558	565	512

4.8 Calculation of Projected House Price Bands

Purpose: This is the calculation of projected house price bands based on the percentage split of the eight price bands.

This section sets out background information on house price trends in the current market. This facilitates an estimation of each of the projected house price bands (including projected annual price increase or decrease of the same) and proportional market split based on the split of the eight price bands. To ensure the most up to date market context, 2019 has been selected and property transactions during the year have been considered representative to understand latest house prices and the distribution of housing units per price band. As demonstrated in **Table 4.8**, 607 transactions occurred in County Offaly across the eight price bands during 2019.

Table 4.8: Overview of house sales in County Offaly during 2019¹⁶

Price Band (€)	Number of Transactions	Percentage of total sales
0-100,000	167	27.5%
100,000-150,000	140	23.1%
150,000-200,000	150	24.7%
200,000-250,000	72	11.9%
250,000-300,000	36	5.9%
300,000-350,000	24	4.0%
350,000-400,000	9	1.5%
400000+	9	1.5%
Total	607	100.00%

¹⁶ Residential Property Price Register (2019) Transactional data for 2019.

Historic house prices have been investigated through analysis of the Residential Property Price Register¹⁷, CSO¹⁸ and Daft data¹⁹ in order to contextualise general trends and how they can influence the market. As illustrated below, the recession and subsequent period of economic growth has resulted in large variances in house prices and in year-on-year growth metrics.

Table 4.9: Historic house price metrics in County Offaly

Year	RPPR	CSO HPA02	CSO HPM02	CSO HPA06	Daft
2011	-16.5%	-21.3%	6.89%	-24.90%	-53.5%
2012	-9.7%	-6.9%	-10.58%	-16.50%	-11.3%
2013	-15.6%	-6.2%	4.64%	-10.50%	-4.8%
2014	16.3%	21.4%	10.77%	5.80%	7.5%
2015	-6.2%	-5.6%	10.73%	14.00%	4.8%
2016	5.5%	4.0%	-18.74%	15.30%	11.5%
2017	21.6%	22.5%	49.33%	12.10%	10.0%
2018	6.9%	2.8%	7.77%	12.60%	10.0%
2019	5.0%	7.8%	-25.02%	6.30%	-4.2%

Given the context of improving economic conditions and its associated influence on house prices, it is anticipated that the distribution per price band will continue to change during the plan period as demonstrated in **Table 4.10**.

Table 4.10: Calculation of projected distribution of houses by price band in County Offaly during the plan period

This information has supported the calculation of projected house price bands based on the percentage split of the 8 price bands as outlined in **Table 4.11**. This reflects market changes to the end of the plan period including:

- Changing distribution of housing units per price band (as outlined in **Table 4.10**); and
- Annual increase in average house prices of between 6.5% (in 2021) to 5% (from 2022 onwards). This forecast assumes a slight reduction on the latest levels of house price inflation as outlined in **Table 4.9**.

¹⁷ Residential Property Price Register (2019) Data for the period 2010 – 2020 was downloaded on 23 March 2020.

¹⁸ CSO (2019) Residential Property Transactions Data – Table HPM02 and HPA02 data for the period 2010 – 2019 was reviewed.

¹⁹ Daft Quarterly Reports on House Price were downloaded for Q4 during the period 2011 – 2019.

Table 4.11: Calculation of projected house price bands during the plan period

Year	Average Price Change	1st Band	2nd Band		3rd Band		4th Band		5th Band		6th Band		7th Band
2019	6.5%	100,000	100,001	150,000	150,001	200,000	200,001	250,000	250,001	300,000	300,001	350,000	350,001
2020	5.0%	105,000	105,001	157,500	157,501	210,000	210,001	262,500	262,501	315,000	315,001	367,500	367,501
2021	5.0%	110,250	110,251	165,375	165,376	220,500	220,501	275,625	275,626	330,750	330,751	385,875	385,876
2022	5.0%	115,763	115,764	173,644	173,645	231,525	231,526	289,406	289,407	347,288	347,289	405,169	405,170
2023	5.0%	121,551	121,552	182,326	182,327	243,101	243,102	303,877	303,878	364,652	364,653	425,427	425,428
2024	5.0%	127,628	127,629	191,442	191,444	255,256	255,258	319,070	319,072	382,884	382,886	446,699	446,700
2025	5.0%	134,010	134,011	201,014	201,016	268,019	268,020	335,024	335,025	402,029	402,030	469,033	469,035
2026	5.0%	140,710	140,711	211,065	211,066	281,420	281,421	351,775	351,777	422,130	422,132	492,485	492,487
2027	5.0%	147,746	147,747	221,618	221,620	295,491	295,493	369,364	369,365	443,237	443,238	517,109	517,111

4.9 Calculation of Mortgage Capacity of Households

Purpose: This is the determination as to whether households in each decile can qualify for a mortgage that enables them to purchase a house in the lowest price band under the current macro-prudential rules, as set out by the Central Bank of Ireland.

The Central Bank of Ireland have measures in place that set limits on size of mortgages that consumers can borrow through the use of loan-to-value (LTV)²⁰ and loan-to-income (LTI) limits²¹. This approach therefore establishes whether households in County Offaly could qualify for a mortgage that would enable them to purchase a house in the lowest price band under these rules.

The key variables used to determine whether households in a decile can qualify for a mortgage are therefore LTV of 0.90, a maximum LTI ratio of 3.5 and the upper value of the first house price band for that year. **Table 4.12** describes the mortgage capacity of households based on a maximum LTI ratio of 3.5 – i.e. this represents 3.5 times the average annual gross household incomes distributed between each of the ten deciles during the plan period. It should be noted that this has been localised to the county level through the application of a county deflator in a similar manner to the disposable incomes.

Table 4.12: Mortgage capacity of households per decile (€) in County Offaly based on Central Bank Rules

	2021	2022	2023	2024	2025	2026	2027
1st Decile	34,877	35,888	36,929	38,000	39,102	40,236	41,403
2nd Decile	58,346	60,038	61,780	63,571	65,415	67,312	69,264
3rd Decile	84,639	87,094	89,620	92,219	94,893	97,645	100,477
4th Decile	110,758	113,970	117,275	120,676	124,175	127,776	131,482
5th Decile	140,780	144,863	149,064	153,387	157,835	162,412	167,122
6th Decile	174,056	179,103	184,297	189,642	195,142	200,801	206,624
7th Decile	212,629	218,795	225,140	231,669	238,388	245,301	252,415
8th Decile	259,286	266,806	274,543	282,505	290,697	299,128	307,802
9th Decile	330,700	340,291	350,159	360,314	370,763	381,515	392,579
10th Decile	541,886	557,600	573,771	590,410	607,532	625,151	643,280

Table 4.13 outlines that during the plan period, the first three deciles (and fourth decile in 2027) do not have sufficient gross household income to meet the requirements of the Central Bank rules. Specifically, 3.5 times their gross income is less than 90% of the value of purchase a house in the lowest projected price band and hence they do not qualify for a mortgage and progress to private rental. Those households that can qualify for a mortgage progress to the needs assessment for ownership.

²⁰ The LTV limit requires you to have a minimum deposit before you can get a mortgage. First-time buyers are allowed up to 90% LTV, meaning they're required to provide a minimum deposit of 10% upfront for any property

²¹ The LTI limit restricts the amount of money you can borrow to a maximum of 3.5 times your gross income

Table 4.13: Determination of Mortgage Qualification for Households

Year	Range	No. of Additional Anticipated Households	Upper Value of Cheapest House Price Band	Minimum LTV (90% of Cheapest House Price)	Maximum LTI (3.5 LTI)	Mortgage Qualification	No. of Additional Anticipated Households That Qualify for a Mortgage	No. of Additional Anticipated Households That Do Not Qualify for a Mortgage
2021	1st Decile	52	110,250	99,225	34,877	FAIL	0	52
	2nd Decile	56			58,346	FAIL	0	56
	3rd Decile	56			84,639	FAIL	0	56
	4th Decile	56			110,758	PASS	56	0
	5th Decile	55			140,780	PASS	55	0
	6th Decile	53			174,056	PASS	53	0
	7th Decile	51			212,629	PASS	51	0
	8th Decile	51			259,286	PASS	51	0
	9th Decile	51			330,700	PASS	51	0
	10th Decile	51			541,886	PASS	51	0
					532			
2022	1st Decile	53	115,763	104,186	35,888	FAIL	0	53
	2nd Decile	57			60,038	FAIL	0	57
	3rd Decile	56			87,094	FAIL	0	56
	4th Decile	56			113,970	PASS	56	0
	5th Decile	55			144,863	PASS	55	0
	6th Decile	54			179,103	PASS	54	0
	7th Decile	52			218,795	PASS	52	0
	8th Decile	52			266,806	PASS	52	0
	9th Decile	52			340,291	PASS	52	0
	10th Decile	52			557,600	PASS	52	0
					539			

2023	1st Decile	54	121,551	109,396	36,929	FAIL	0	54
	2nd Decile	58			61,780	FAIL	0	58
	3rd Decile	57			89,620	FAIL	0	57
	4th Decile	57			117,275	PASS	57	0
	5th Decile	56			149,064	PASS	56	0
	6th Decile	54			184,297	PASS	54	0
	7th Decile	52			225,140	PASS	52	0
	8th Decile	53			274,543	PASS	53	0
	9th Decile	52			350,159	PASS	52	0
	10th Decile	52			573,771	PASS	52	0
		545						377
2024	1st Decile	54	127,628	114,865	38,000	FAIL	0	54
	2nd Decile	58			63,571	FAIL	0	58
	3rd Decile	58			92,219	FAIL	0	58
	4th Decile	58			120,676	PASS	58	0
	5th Decile	57			153,387	PASS	57	0
	6th Decile	55			189,642	PASS	55	0
	7th Decile	53			231,669	PASS	53	0
	8th Decile	53			282,505	PASS	53	0
	9th Decile	53			360,314	PASS	53	0
	10th Decile	53			590,410	PASS	53	0
		551						381
2025	1st Decile	55	134,010	120,609	39,102	FAIL	0	55
	2nd Decile	59			65,415	FAIL	0	59
	3rd Decile	58			94,893	FAIL	0	58
	4th Decile	58			124,175	PASS	58	0
	5th Decile	57			157,835	PASS	57	0
	6th Decile	55			195,142	PASS	55	0

	7th Decile	54			238,388	PASS	54	0
	8th Decile	54			290,697	PASS	54	0
	9th Decile	54			370,763	PASS	54	0
	10th Decile	54			607,532	PASS	54	0
		558					386	172
2026	1st Decile	55	140,710	126,639	40,236	FAIL	0	55
	2nd Decile	60			67,312	FAIL	0	60
	3rd Decile	59			97,645	FAIL	0	59
	4th Decile	59			127,776	PASS	59	0
	5th Decile	58			162,412	PASS	58	0
	6th Decile	56			200,801	PASS	56	0
	7th Decile	54			245,301	PASS	54	0
	8th Decile	54			299,128	PASS	54	0
	9th Decile	54			381,515	PASS	54	0
	10th Decile	54			625,151	PASS	54	0
		565						
2027	1st Decile	50	147,746	132,971	41,403	FAIL	0	50
	2nd Decile	54			69,264	FAIL	0	54
	3rd Decile	54			100,477	FAIL	0	54
	4th Decile	54			131,482	FAIL	0	54
	5th Decile	53			167,122	PASS	53	0
	6th Decile	51			206,624	PASS	51	0
	7th Decile	49			252,415	PASS	49	0
	8th Decile	49			307,802	PASS	49	0
	9th Decile	49			392,579	PASS	49	0
	10th Decile	49			643,280	PASS	49	0
		512						

4.10 Calculation of Projected Needs for Ownership

Purpose: This is the calculation of the approximate affordable house price for each of the ten deciles per year during the plan period based on the application of the annuity formula. Following this, the calculation of the households surplus and/or deficit per price band has been undertaken with respect to the number of households that can qualify for a mortgage.

The projected household income during the plan period have been applied to the DHPLG Model Housing Strategy annuity formula. This formula determines the maximum affordable house price for each of the ten income deciles based on a number of evidence-based variables that have been established through analysis of historic mortgage lending data from the Central Bank²².

The key variables that have been used in the annuity formula for the purpose of this assessment are as follows:

- Maximum affordability threshold of 35% (i.e. maximum expenditure of disposable income on mortgage costs)
- LTV ratio of 0.90
- Annual interest rate (APR) of 3%
- Loan term of 29 years.

It should be noted, that whilst some of the lower deciles have a maximum affordable house price that is higher than the lowest price band for that year, as outlined in the preceding step, these households would not qualify for a mortgage due to the current Central Bank rules.

Table 4.14: Approximate affordable house price (€) in County Offaly

	2021	2022	2023	2024	2025	2026	2027
1st Decile	78,458	80,734	83,075	85,484	87,963	90,514	93,139
2nd Decile	129,776	133,539	137,412	141,397	145,498	149,717	154,059
3rd Decile	186,454	191,861	197,425	203,150	209,042	215,104	221,342
4th Decile	237,592	244,482	251,572	258,867	266,374	274,099	282,048
5th Decile	290,743	299,174	307,850	316,778	325,965	335,418	345,145
6th Decile	346,469	356,516	366,855	377,494	388,441	399,706	411,297
7th Decile	408,870	420,727	432,928	445,483	458,402	471,696	485,375
8th Decile	481,395	495,355	509,720	524,502	539,713	555,365	571,470
9th Decile	580,387	597,219	614,538	632,359	650,698	669,568	688,986
10th Decile	873,437	898,766	924,831	951,651	979,249	1,007,647	1,036,869

Based on the determination of additional households required (Refer to Table 4.7 and Table 4.10), the projected house price bands (i.e. Table 4.11), the determination of households that can qualify for a mortgage (Refer to Table 4.13) and the calculation of housing affordability (Refer to Table 4.14), the housing surplus/deficit per price band has been determined as set out in Table 4.15.

²² Central Bank (2019) New Mortgage Lending – Data and Commentary H1 2019.

A surplus within a price band has been identified where the number of housing units anticipated is greater than the number of households that qualify for a mortgage and have the ability to purchase a home at the upper value of that house price band. A deficit has been identified within a price band where there is a fewer households anticipated compared to the number of households that qualify for a mortgage and have the ability to purchase a home at the upper value of that house price band.

Throughout the plan period, there is generally a housing surplus in the lower price bands and housing deficit in the higher price bands as identified in **Table 4.15**. A sufficient number of houses is anticipated overall as households in the upper price bands can purchase a house in a lower price band. Additionally, the bottom three deciles (plus the fourth decile in 2027) will not qualify for a mortgage (due to the current Central Bank rules), therefore there will be sufficient number of houses within County Offaly to those households that qualify for a mortgage and have the ability to purchase a home at the upper value of the lowest house price band.

Table 4.15: Calculation of Surplus/Deficit in Housing Available to Additional Households That Qualify For a Mortgage

Year	Range	No. of Additional Anticipated Households That Qualify for a Mortgage	Running Total	Affordability Threshold	Household Price Band(s)	Upper Value of Price Band	No. of Households That Qualify for a Mortgage Able to Purchase at Upper Value	% of Housing Units Anticipated per Price Band	No. Housing Units Anticipated per Price Band	Housing Surplus (+) or Deficit (-) per Price Band
2021	1st Decile	0	0	78,458	1st Band	110,250	0	27.3%	100	100
	2nd Decile	0	0	129,776	2nd Band	165,375	0	22.9%	84	84
	3rd Decile	0	0	186,454	3rd Band	220,500	52	25.0%	92	41
	4th Decile	56	56	237,592	4th Band	275,625	53	12.0%	44	-9
	5th Decile	55	110	290,743	5th Band	330,750	51	6.0%	22	-29
	6th Decile	53	163	346,469	6th Band	385,875	47	3.9%	14	-32
	7th Decile	51	214	408,870	7th Band	441,000	41	1.4%	5	-36
	8th Decile	51	266	481,395	8th Band	None	-	1.4%	5	-
	9th Decile	51	317	580,387						
	10th Decile	51	368	873,437						
		368						100.00%	368	119.37
2022	1st Decile	0	0	80,734	1st Band	115,763	0	27.2%	101	101
	2nd Decile	0	0	133,539	2nd Band	173,644	0	22.8%	85	85
	3rd Decile	0	0	191,861	3rd Band	231,525	53	25.2%	94	41
	4th Decile	56	56	244,482	4th Band	289,406	55	12.1%	45	-9
	5th Decile	55	111	299,174	5th Band	347,288	53	6.0%	23	-30
	6th Decile	54	165	356,516	6th Band	405,169	48	3.9%	14	-34
	7th Decile	52	217	420,727	7th Band	463,050	42	1.4%	5	-37
	8th Decile	52	269	495,355	8th Band	None	-	1.4%	5	-
	9th Decile	52	321	597,219						

	10th Decile	52	372	898,766						
		372						100.00%	372	115.85
2023	1st Decile	0	0	83,075	1st Band	121,551	0	27.1%	102	102
	2nd Decile	0	0	137,412	2nd Band	182,326	0	22.7%	85	85
	3rd Decile	0	0	197,425	3rd Band	243,101	55	25.4%	96	41
	4th Decile	57	57	251,572	4th Band	303,877	56	12.2%	46	-10
	5th Decile	56	113	307,850	5th Band	364,652	55	6.1%	23	-32
	6th Decile	54	167	366,855	6th Band	425,427	50	3.9%	15	-35
	7th Decile	52	219	432,928	7th Band	486,203	44	1.4%	5	-39
	8th Decile	53	272	509,720	8th Band	None	-	1.4%	5	-
	9th Decile	52	324	614,538						
	10th Decile	52	377	924,831						
		377						100.00%	377	112.13
2024	1st Decile	0	0	85,484	1st Band	127,628	0	26.9%	103	103
	2nd Decile	0	0	141,397	2nd Band	191,442	0	22.6%	86	86
	3rd Decile	0	0	203,150	3rd Band	255,256	57	25.5%	97	41
	4th Decile	58	58	258,867	4th Band	319,070	58	12.3%	47	-11
	5th Decile	57	114	316,778	5th Band	382,884	56	6.1%	23	-33
	6th Decile	55	169	377,494	6th Band	446,699	63	3.8%	15	-48
	7th Decile	53	222	445,483						
	8th Decile	53	275	524,502	7th & 8th Band	None	-	2.7%	10	-
	9th Decile	53	328	632,359						
	10th Decile	53	381	951,651						
		381						100.00%	381	136.48
2025	1st Decile	0	0	87,963	1st Band	134,010	0	26.8%	103	103
	2nd Decile	0	0	145,498	2nd Band	201,014	0	22.5%	87	87
	3rd Decile	0	0	209,042	3rd Band	268,019	95	25.7%	99	4

	4th Decile	58	58	266,374						
	5th Decile	57	115	325,965	4th Band	335,024	52	12.3%	48	-5
	6th Decile	55	171	388,441	5th Band	402,029	50	6.2%	24	-26
	7th Decile	54	225	458,402	6th Band	469,033	45	3.8%	15	-30
	8th Decile	54	278	539,713	7th & 8th Band	None	-	2.7%	10	-
	9th Decile	54	332	650,698						
	10th Decile	54	386	979,249						
		386						100.00%	386	133.44
2026	1st Decile	0	0	90,514	1st Band	140,710	0	26.7%	104	104
	2nd Decile	0	0	149,717	2nd Band	211,065	0	22.4%	87	87
	3rd Decile	0	0	215,104	3rd Band	281,420	98	25.9%	101	3
	4th Decile	59	59	274,099						
	5th Decile	58	117	335,418	4th Band	351,775	54	12.4%	48	-6
	6th Decile	56	173	399,706	5th Band	422,130	51	6.2%	24	-27
	7th Decile	54	227	471,696	6th Band	492,485	46	3.8%	15	-32
	8th Decile	54	282	555,365	7th Band	562,840	33	1.3%	5	-27
	9th Decile	54	336	669,568	8th Band	None	-	1.3%	5	-
	10th Decile	54	390	1,007,647						
	390						100.00%	390	102.75	
2027	1st Decile	0	0	93,139	1st Band	147,746	0	26.6%	80	80
	2nd Decile	0	0	154,059	2nd Band	221,618	0	22.3%	67	67
	3rd Decile	0	0	221,342	3rd Band	295,491	45	26.0%	78	33
	4th Decile	0	0	282,048						
	5th Decile	53	53	345,145	4th Band	369,364	48	12.5%	38	-10
	6th Decile	51	103	411,297	5th Band	443,237	47	6.2%	19	-28
	7th Decile	49	153	485,375	6th Band	517,109	43	3.8%	11	-32
	8th Decile	49	202	571,470	7th Band	590,982	33	1.3%	4	-29
	9th Decile	49	251	688,986	8th Band	None	-	1.3%	4	-

	10th Decile	49	301	1,036,869					
		301					100.00%	301	81.20

4.11 Calculation of Projected Needs for Private Rental

Purpose: This is the calculation of the households not meeting the affordability criteria to privately rent a home with respect to the number of households that cannot qualify for a mortgage.

This section sets out background information on rental trends in the current market. This facilitates an estimation of estimated rental price by unit type during the plan period (including projected annual price increase or decrease of the same).

To ensure the most up to date market context, data from Daft Rental Reports have been reviewed in addition to the data from the Rental Tenancies Board²³ as outlined in **Table 4.16** to understand historic changes in the rental market in County Offaly. It is also recognised that whilst there are no Rent Pressure Zones within County Offaly, Graiguecullen-Portarlinton in County Laois (which adjoins the Offaly side of Portarlinton) was designated as a Rent Pressure Zone in July 2019.

Table 4.16: Historic rental prices by unit type (€) in County Offaly

	One bed	Two bed	Three bed	Four plus bed	All bedrooms	YOY change (All)
2019	524	671	758	865	722	9.2%
2018	493	619	693	758	661	7.3%
2017	462	567	646	715	616	6.9%
2016	432	528	600	677	576	4.7%
2015	422	501	574	640	550	-12.0%
Average	466.6	577.2	654.2	731	625	

The demand per unit type has therefore been established from the Rental Tenancies Board and 5% annual growth rate in average rent price has been applied to understand the projected price of rent per unit type in County Offaly. The projected rental price by unit type during the plan period is outlined in **Table 4.17**.

Table 4.17: Projected rental prices by unit type (€) throughout the plan period in County Offaly

Year	One bed	Two bed	Three bed	Four plus bed
2021	578	740	836	954
2022	607	777	877	1001
2023	637	816	921	1051
2024	669	856	967	1104
2025	702	899	1016	1159
2026	737	944	1067	1217
2027	774	991	1120	1278

As noted previously, it is generally accepted that if housing costs exceed 35 per cent of a household's disposable income, the housing is unaffordable as housing costs consume a disproportionately high amount of household income⁹. Based on this information, the number of households not meeting the "Affordability Criteria" for private rental during the plan period have been identified as outlined in **Table 4.18**. Those that cannot afford private rental are therefore considered to require social housing.

²³ Rental Tenancies Board (2019) Table RIA02 - Average Monthly Rent Report by Year, Location, Property Type and Number of Bedrooms.

Table 4.18: Number of additional anticipated households that do not qualify for a Mortgage and cannot afford Private Rental

	2021	2022	2023	2024	2025	2026	2027
1 Bed	12	12	12	12	12	12	11
2 Bed	50	51	52	52	53	53	48
3 Bed	72	73	74	75	76	77	93
4+ Bed	24	24	25	25	25	25	31
Total	158	160	162	164	166	168	184

It should be noted that during the plan period, six households can afford private rental for a one-bedroom unit annually from 2021 to 2026, despite not qualifying for a mortgage as outlined in **Table 4.18**. Additionally in 2027, a further six households (in the third and fourth decile) can afford private rental for a one bedroom unit whilst an additional 16 households (in the fourth decile) can afford private rental for or a two bedroom unit. All other units in the private rental market are not considered to be affordable during the plan period and therefore every other household that cannot qualify for a mortgage and cannot afford private rental will require social housing.

Table 4.19: Number of additional anticipated households that do not qualify for a Mortgage but can afford Private Rental

	2021	2022	2023	2024	2025	2026	2027
1 Bed	6	6	6	6	6	6	12
2 Bed	0	0	0	0	0	0	16
3 Bed	0	0	0	0	0	0	0
4+ Bed	0	0	0	0	0	0	0
Total	6	6	6	6	6	6	28

4.12 Summary of Projected Social Housing Needs

Purpose: This is the calculation of the households who can be classified as having an affordability problem during the period 2021-2027 so as to adequately inform the necessary provision units in County Offaly.

This section summarises the anticipated social housing need for Offaly County Council as set out in the preceding steps and reflects assessments for mortgage qualification and the affordability for ownership and private rental.

Table 4.20 outlines the number of additional households anticipated over the plan period, the number of those households that do not qualify for a mortgage and number of those households that do not qualify for a mortgage and cannot afford private rental. This is also illustrated in **Figure 4.1**.

Table 4.20: Housing shortfall throughout the plan period in County Offaly

	2021	2022	2023	2024	2025	2026	2027	2021-2027
No. of Additional Anticipated Households	532	539	545	551	558	565	512	3,803
No. of Additional Households That Do Not Qualify for a Mortgage	164	166	168	170	172	174	212	1,227
No. of Additional Anticipated Households That Do Not Qualify for a Mortgage and Cannot Afford Private Rental	158	160	162	164	166	168	184	1,162
Housing Shortfall (%)	29.7%	29.7%	29.7%	29.7%	29.7%	29.7%	35.8%	30.6%

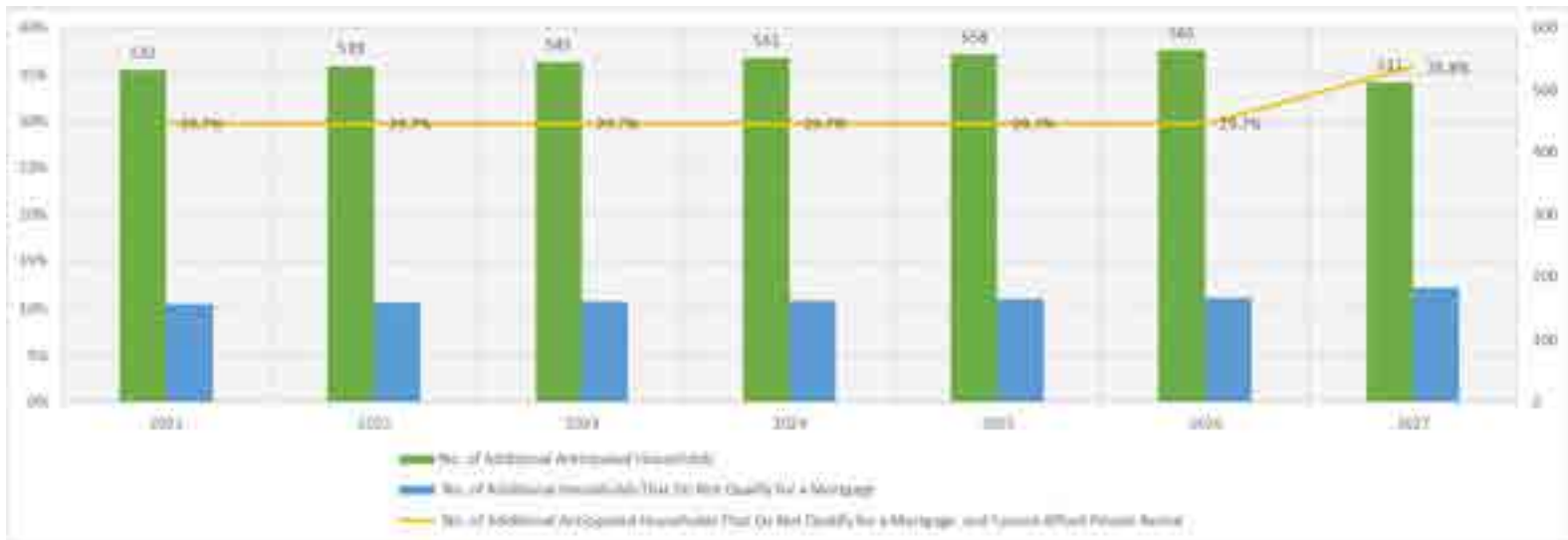


Figure 4.1: Summary of housing requirements over the plan period

5 Analysis of Housing Requirements in Offaly

5.1 Overview

This section succinctly summarises the overall housing requirements for the county having regard to the supply and demand analysis outputs discussed in previous sections.

Between 2021 and 2027, this Strategy forecasts a population increase of 5,823 in County Offaly. This in turn indicates a total population of 87,200 in 2027. The population targets for this Plan period (2021-2027), as set out in the Core Strategy, establishes a total housing target for Offaly of 3,803 units over the plan period 2021-2027, the equivalent of 543 units per annum.

It has been determined that 1,227 of the 3,803 additional anticipated households will not qualify for a mortgage during the plan period and that 1,162 of these households do not meet the affordability criteria for private rental. With regards to private rental affordability, households which are identified as not being able to meet the 'Affordability Criteria' over the plan period are therefore considered to require social (and affordable) housing which equates to an average of 30.6% of the additional anticipated households.

Section 93 of the Planning and Development Act 2000, defines 'affordability' as "a person who is in need of accommodation and whose income would not be adequate to meet the payments of a mortgage for the purchase of a house to meet his or her accommodation needs because the payments calculated over the course of a year would exceed 35% of that person's annual income net of income tax and pay related social insurance..." This has been applied within this analysis and informs the determination of the social requirement for the plan period.

It should be noted that while some of these households could afford to sustainably repay a loan of a certain size, their inability to qualify for a mortgage precludes them and effectively results in them being considered as having either a social or affordable need (after their assessment under private rental conditions).

Most of the households who do not qualify for a loan also face difficulties affording private rental. Based on this analysis, the identified social requirement for the 6-year plan period is 1,162 units (30.6%) of total additional households.

The following sections set out specific analysis around three core components. This analysis provides further understanding around specific dynamics of future housing demand in Offaly over the plan period. These are as following:

- Demand for single one-off dwellings in the countryside during the plan period
- Household Size Cohort
- Household Tenure

Following this, section 5.5 provides an overview of how social housing support is administered by Offaly County Council, with existing delivery methods and targets set out in section 5.5.3.

5.2 Single One-Off Dwellings

The NPF requires that Development Plans project the demand for single once-off dwellings throughout the plan period:

National Policy Objective 20: *Project the need for single housing in the countryside through the local authority's overall Housing Need Demand Assessment (HNDA) tool and county development plan core strategy processes.*

A linear extrapolation of the number of granted planning applications for single rural dwellings between 2006 - 2019 has been undertaken (Refer to Figure 5.1 and Table 3.8). This identifies that approximately 54.7% of all granted residential units within any given year have been for single one-off dwellings.

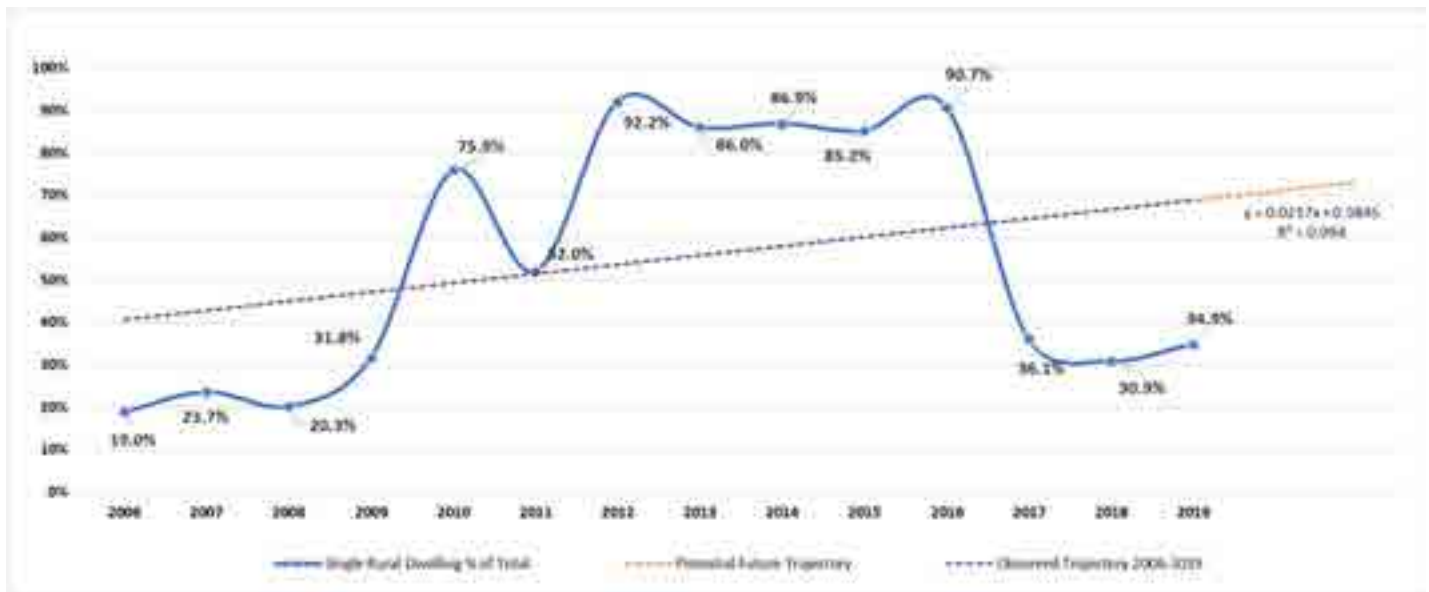


Figure 5.1: Granted Applications for Single One-Off Dwellings as a % of Total Granted Applications for Residential units during 2006 – 2019

However, to consider more recent trends of granted single rural dwellings, A more a specific analysis focusing on the last two years where full-year data is available (2018-2019) indicates that on average, 33% of the total number of residential units granted have been for single one-off dwellings. This provides an indication of the potential projection for such housing types over the development plan period.

5.3 Household Size Cohort

As set out in Section 6.6 of the NPF, information on household composition and projections are informative evidence inputs that can assist with understanding stock profile pressures. Analysis of the historic household sizes (specifically the household size cohort per household) has therefore been undertaken to help discern and forecast how the composition of households may change during the plan period.

Analysis of the average intercensal change from 2002 – 2016 has been considered and annualised to assist with forecasting future change in the number of people per household. This is generally progressing towards fewer people per household during the plan period as illustrated in **Error! Reference source not found..2**.

In turn, this analysis shows that 1 and 2 person households will form the largest overall cohort over the plan period, amounting to a combined total of 53.06% of all households by 2027. The number of households comprising of 4 people or more will continue to decline between 2021-2027. Households with four or more people will amount to approximately 28.7% of total households by 2027.

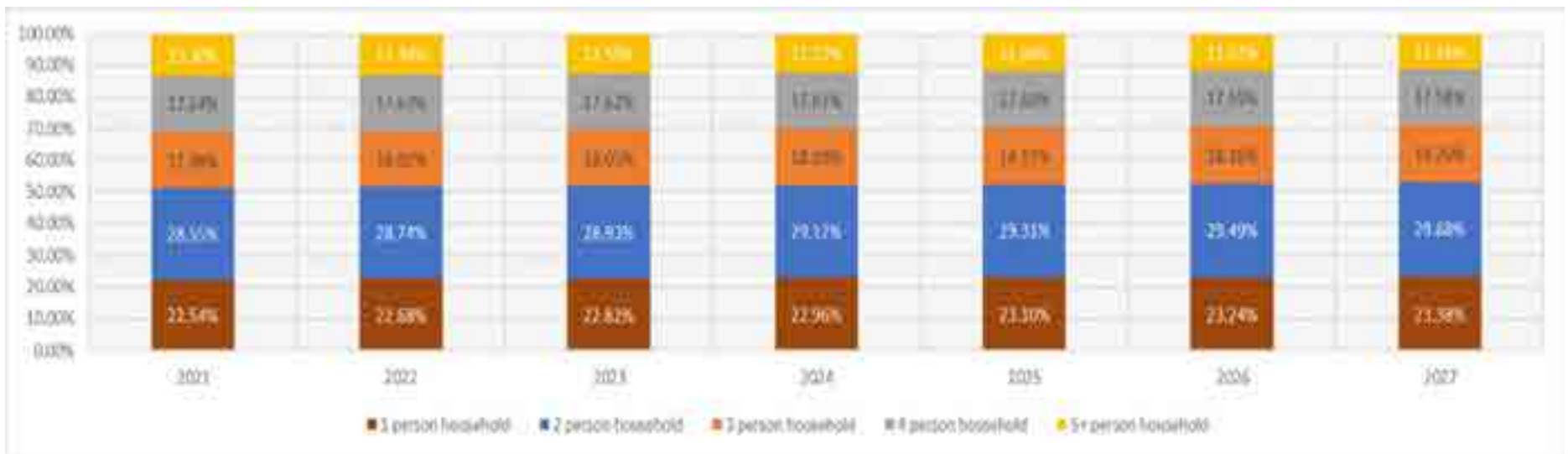


Figure 5.2 Forecasted household size cohorts during the plan period

5.4 Household Tenure

Tenure is an important consideration for the delivery of housing and Section 6.6 of the NPF identifies the need to estimate the demand for different tenure types. Analysis of the historic tenure split has therefore been undertaken to help discern and forecast how the household tenure may change during the plan period.

Analysis of the average intercensal change from 2002 – 2016 has been considered and annualised to assist with forecasting future change in the proportion of owner occupiers, private rental and other rental (which includes rental from local authorities, housing bodies and those in occupation free of rent). The historic data suggests that year on year private rental and other rental is growing (0.44% and 0.17% respectively) whilst owner occupation is declining (by 0.61%) as illustrated in Figure 5.3.

By 2027, almost 66.3% of all households will live in owner occupied dwellings in Offaly. This is a decrease of 3.6% from the 2016 figure of 69.93%. The plan period will also see a slight growth of approximately 3% in the rental sector between 2021-2027.

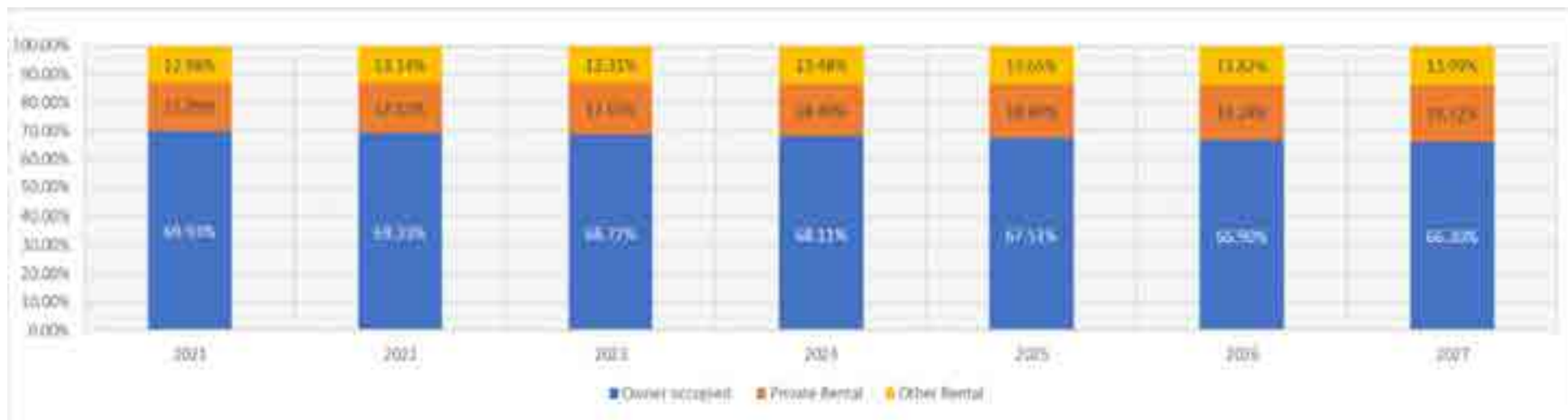


Figure 5.3: Forecasted tenure composition during the plan period

5.5 Social Housing Supply and Demand

5.5.1 Existing Social Housing Needs

The Social Housing Support Need Analysis identifies the social housing need (exclusive of applicants on a transfer list or those availing of HAP) of County Offaly. As of March 2020, 663 households are on the social housing waiting list in County Offaly.

5.5.2 Meeting Social Housing Demand

Social Housing support in Offaly is administered by the Housing Department of Offaly County Council in the following ways:

1. **A social rented tenancy in property owned and managed by the local authority and a tenancy in a property the local authority is managing or has leased from a private property owner.** These can include:
 - Offaly County Council Construction Projects.
 - Provision of Social Housing under Part V of the Planning and Development Acts 2000: While the provision of social housing via traditional Part V mechanism will continue to play a role in the delivery of social housing in Co. Offaly, other delivery channels for social housing are likely to be more significant in terms of their potential to contribute to the social housing targets set out. The statutory context for the provision of social and affordable housing has changed under the Urban Regeneration and Housing Act 2015. The amendments include that there will be a requirement for up to 10% social housing in developments in excess of 9 units. The use of cash payments in lieu of social housing provision is no longer allowed. Provision is made for the transfer of completed units on other land not subject to the planning permission to be provided. Provision is also made for the Part V obligation to be fulfilled by developers through long term leasing of properties and rental accommodation availability agreements.
 - Portfolio Acquisitions: Suitable portfolios of vacant properties can be acquired from financial institutions and investors.
 - Acquisitions: This is the purchase by Offaly County Council of a second-hand house on the open market.
 - Buy and Renew: Under this scheme Offaly County Council can buy sub-standard properties, which have been vacant for over a year, refurbish them and bring them back into use through the Council's housing stock. The purchase cost plus the cost of refurbishment can't exceed what a comparable property would attain on the private market. This initiative, which complements the Repair & Leasing Scheme, is designed to assist local authorities and AHBs (Approved Housing Bodies) to harness the accommodation potential that exists in certain vacant properties for social housing use.
 - Turnkeys: Offaly County Council buy a new house/houses from a developer, ready for a tenant to move into.
 - Tenant Purchase Scheme: In January 2016, a new scheme for the purchase of existing local authority houses came into effect – The Tenant (Incremental) Purchase Scheme 2016.
2. **A social rented tenancy in property owned and managed by an approved housing body (AHB).** AHB's provide social housing and are formed for the purpose of relieving housing need and the provision and management of housing. They are established by a voluntary management board to benefit the community in which they are based and are approved and funded by the Department of Housing, Planning and Local Government. Housing cooperatives can provide both social rented housing and housing to purchase. Housing cooperatives are self-help and jointly owned member/user housing associations or societies. Projects undertaken may be in

response to the needs of the elderly, people with disabilities, homeless persons or families and single people on low incomes. Some housing associations may be formed to specialise in meeting a particular housing need, others develop with broader aims. The specific housing services offered will depend on the aims or concerns of the members, the needs of tenants as well as the financial and other resources available for both capital costs and ongoing management running costs. As of March 2020, AHB's in Offaly provide 514 properties.

3. Offaly County Council also provides accommodation specifically for Travellers and for people with specific housing needs such as people with disabilities and the homeless. Delivery programmes responding to specific needs include the following:

- Refugee Resettlement Programme: Under the Refugee Resettlement refugees are being allocated social housing in Offaly. The families are part of approximately 4,000 people which the government has committed to receiving through the Irish Refugee Protection Programme. County Councils will continue to work with Central Government and relevant State Agencies Office in responding to its requirements to support refugees as they undergo their resettlement process in Co. Offaly.
- Traveller Accommodation Plan: Under the provisions of the Housing Traveller Accommodation Act 1998, Offaly Local Authorities are required to prepare, adopt and implement a Traveller Accommodation Programme (TAP) to meet the accommodation needs of the county's indigenous Traveller community. The current Traveller Accommodation Programme sets out the strategy for provision of Traveller accommodation and support services over a five-year period from 2019-2024. The current traveller specific accommodation in Offaly is as described in Table 5.2 below:

Table 5.2 Breakdown of Traveller Accommodation in Offaly (November 2018)

Accommodation Type	Total Families
Standard L.A. Social Housing	116
L.A. Group Housing	4
Houses acquired or improved with LA Assistance	22
Privately Owned Houses	4
Private Rented	44
Voluntary Housing	26
Permanent Halting Sites	28
Shared accommodation in Standard LA/Group/AHB housing	19
Shared accommodation in private rented	5
Shared accommodation on Permanent Halting Sites	9
Roadside or un-serviced unofficial sites	31
Illegally occupying bays/footpaths on permanent Halting Site	4
Emergency Accommodation	8
Total Families with Accommodation	320

In November 2018 as part of the annual National Traveller Estimate a total of 320 traveller families were identified in County Offaly. 244 (76%) are currently accommodated while 76 families (24%) were found to be sharing accommodation in various accommodation types. 35 of these families are living on the roadside or on unofficial halting sites and 8 are in emergency accommodation. Of these 76 families, 45 had an open Housing Application with Offaly County Council while 11 had no application with the authority and 20 had closed Housing Applications - 10 of these 31 had requested that their application be closed, i.e., were allocated a social housing unit or had previously been tenants and had left.

An assessment of the accommodation need was carried out in November 2018. This statutory assessment of need assessed all applicants seeking assistance with accommodation. The number of approved Traveller families seeking accommodation is 45 as set out in Table 5.3 below which shows the breakdown of their preferred accommodation type:

Table 5.3 Assessment of Traveller Accommodation Need (November 2018)

Area	Birr Town	Kilcor-mac	Shinrone	Banagher	Tullamore Town	Tullamore MD	Eden-derry	Portarli-ngton	Total
Halting Site	1				4	1			6
Group Housing Scheme	3	1				1			5
Standard Housing	4	1	1	1	11	10	3	1	32
Rural Housing								2	2
Total	8	2	1	1	15	12		3	45

In order for Offaly County Council to meet the projected accommodation need during the lifetime of this programme, the year on year targets outlined in Table 5.4 have been identified. It is worth noting that Offaly County Council exceeded its targets in the 2014 – 2018 Traveller Accommodation Programme by 53%.

Table 5.4 Traveller Accommodation Annual Target

Year	Target
2019	15
2020	13
2021	13
2022	8
2023	7
2024	9
Total	65

The delivery schemes for traveller accommodation in Offaly County are as follows:

- Standard Social Housing (Local Authority and Approved Housing Bodies)
- Group Housing Scheme
- Halting Sites
- Leasing Scheme and Rental Accommodation Scheme
- Private Rented Accommodation supported via Housing Assistance Payment
- Rebuilding Ireland Home Loans
- Tenant (Incremental) Purchase Scheme
- Housing Adaptation Grants
- Improvement Works in Lieu of Housing
- Special Traveller Grants
- Housing Transfers

4. A tenancy where the local authority arranges short or long-term leases with private landlords for particular properties. (People in receipt of rent supplement for 18 months or longer are eligible to apply for this type of accommodation).

- The HAP Scheme: The Housing Assistance Payment (HAP) is a scheme under the Housing Miscellaneous Provisions Act 2014 for people who have a long-term housing need and who qualify for social housing support. It is administered by housing authorities and will eventually replace long-term rent supplement. The HAP scheme aims to allow all social housing supports to be accessed through the local authorities and to enable people to take up full-time employment and keep their housing support. Under the scheme the housing applicant finds appropriate private rented accommodation (within specific caps). The Local Authority then pays the landlord directly and the tenant pays a rent to the local authority based on the differential rent scheme.
- RAS (Rental Accommodation Scheme): The RAS is an initiative to cater for the accommodation needs of certain persons in receipt of rent supplement, normally for more than 18 months and who are assessed as having a long-term housing need. Offaly County Council pays rent directly to the accommodation providers on behalf of the tenant (which is a maximum of 92% of the market rent). The County Council makes use of the private and voluntary sector and engage in a contractual arrangement to secure medium-long term rented accommodation.
- Repair and Lease: The Rebuilding Ireland Action Plan for Housing and Homelessness introduced a new scheme, the Vacant Housing Repair and Leasing Initiative. This scheme specifically targets the delivery of social housing and seeks to ensure that existing housing stock is used to the maximum degree possible. The basis of the scheme is that repair and improvement works to suitable vacant properties are funded to bring them up to the standard for rented accommodation and the cost of the works is then deducted from lease payments over an agreed lease term

5.5.3 Delivery Methods and Targets

It is anticipated that Offaly County Council will continue to meet their identified social housing provision via a combination of these existing delivery schemes (as set out in Section 5.5.2) and through the introduction or greater emphasis of other either existing or recently established schemes and mechanisms. This section assesses different Social Housing delivery channels available in County Offaly and their progress to date in achieving the targets set out in the Rebuilding Ireland: Action Plan for Housing and Homelessness which was published in July 2016.

The Action Plan recognises issues around supply and affordability in Ireland’s housing sector and provides a multi-stranded approach to achieve key housing objectives up to 2021. The Action Plan sets a commitment to deliver 138,000 additional social housing units nationally over the period 2016-2021. This will include 83,760 HAP homes, 3,800 RAS homes and over 50,000 new homes, broken down as follows: Build: 33,617; Acquisition: 6,830; Leasing:10,036.

In Offaly, the county target for 2019 is 326 additional units across all social housing delivery streams as indicated in Table 5.5 below.

Table 5.5: Offaly Social Housing Targets under Rebuilding Ireland

Targets 2018-2021		Targets 2019					
Build, Acquisition and Leasing		Building, Acquisition, Leasing	Build	Acquisition	Leasing	HAP & RAS	All SH delivery streams
Offaly	437	136	88	28	20	190	326

Progress on the delivery of social housing units is documented as part of quarterly updates by the Department of Housing, Planning and Local Government. The most recently available progress update for 2019 is documented in Table 5.6 below. This shows that the total output in 2019 was 384 units. This means that Offaly County Council achieved 117.8% of the Rebuilding Ireland Target in 2019. This follows 2018 where Offaly County Council also exceeded its targets, delivering 387 units or 126% of its requirements.

In 2019, the target was to deliver 136 units by way of ‘building, acquisition and leasing’ as illustrated in Table 5.5. In 2019, 170 units were delivered via these means. In total between 2018-2021, 437 units were targeted to be delivered via these streams. Through 2018-2019, Offaly County Council have already delivered 263 units through these mechanisms. Thus, over the course of 2020-2021, approximately 174 additional units are to be delivered through ‘building, acquisition and leasing’ mechanisms in order to meet the Rebuilding Ireland targets.

As of March 2020, and as previously discussed in Section 5.5.1, 663 households (exclusive of applicants on a transfer list or those availing of HAP) are on the social housing waiting list in County Offaly. Should the Rebuilding Ireland targets continue to be met up to 2021, there is potential for the existing social requirement to reduce quite substantially. Between 2018 and 2019, the social housing waiting list in Offaly reduced by 4.6%²⁴.

²⁴ <https://www.housingagency.ie/sites/default/files/SHA-Summary-2019-DEC-2019-WEB.pdf>

Table 5.6: Progress on Rebuilding Ireland Social Housing Targets 2019

Build (Offaly County Council Output 2019)						
Offaly County Council	LA New Build ^[1]	AHB New Build ^[2]	Part V -New Build ^[3]	Total New Build	LA Voids ^[8]	All Build Total
	47	10	0	57	31	88
Acquisition (Offaly County Council Output 2019)						
	LA Acquisition		AHB Acquisition		Acquisition Total	
	36		15		51	
Other (Offaly County Council Output 2019)						
	Leasing ^[4]		RAS ^[5]		HAP ^[6]	
	31		3		211	
Total Output 2019 under Rebuilding Ireland					384	

1. LA New Build includes units delivered through Rapid, Traditional, Turnkey and Regeneration (detail available on the Construction Status Report ^[7])

2. AHB New Build includes CAS and CALF New Build (detail available on the Construction Status Report [7])

3. Part V New Build includes Part V's delivered under LA Build and AHB Build

4. New leasing units operational are defined as the number of new leasing units delivered under this scheme in the given period. This program was previously known as long term leasing until 2014.

5. RAS - New transfers is defined as the number of households which have moved from Rent Supplement to RAS in that specific year. It includes households who remained in their existing accommodation and those for whom the LA had to source new properties.

6. HAP - New Households Supported refers to the number of qualified households with an established housing need who are being accommodated under the HAP scheme for that year.

7. The most recently published Construction Status Report is available on www.rebuildingireland.ie

8. LA Voids includes 132 voids beyond the void target set under Rebuilding Ireland for Q3 2019

6 Policy Objectives to Deliver Housing Strategy

This section has evolved from the analysis of the housing requirements that have emerged during the preparation of the strategy. Firstly, it outlines a number of housing objectives that inform the overall approach to the housing strategy. Secondly, it formalises these objectives through a series of recommended housing policies.

6.1 Housing Strategy Objectives

The Planning and Development Act 2000 (as amended) sets out clear requirements for the monitoring and review of local authority housing strategies. Section 95 subsection (1)(b) requires that a planning authority's development plan should include objectives to ensure that the housing strategy is implemented. The objectives of this Housing Strategy are as follows:

	It is the Objective of Offaly County Council to:
HO-01	To procure vacant homes to ensure their continued use for residential purposes into the future, and develop housing in infill and brownfield sites within town and village centres for social and affordable housing provision.
HO-02	To monitor the effectiveness of the Housing Strategy in meeting and resolving identified housing needs, and to review and revise the Housing Strategy as necessary should a variation to this Plan be made or if Part V planning legislation is amended during the lifetime of this plan.
HO-03	To support the ongoing monitoring and review of the Housing Need Demand Assessment (HNDA) in accordance with a forthcoming HNDA methodology to be issued by Central Government. Furthermore, it is an objective of the Council to monitor and maintain a record of residential development permitted in settlements in accordance with forthcoming Departmental guidance around the establishment of a Housing Need Demand Assessment Coordination and Monitoring Unit and related implementation of a centralised spatial database for local authority housing.
HO-04	To increase and effectively manage the stock of social housing within the county in order to meet the long term housing needs of those households on the local authority housing list.
HO-05	To provide suitable housing accommodation and living conditions for the Traveller community in accordance with the Offaly Traveller Accommodation Programme 2019 – 2024, and any subsequent programme adopted by the Council.
HO-06	To secure implementation of the Part V Housing Strategy, in particular, through the reservation of 10% of all land zoned solely for residential use, or for a mixture of residential or other uses, to be made available for the provision of social and affordable housing referred to in section 94(4)(c) of the Planning and Development Act 2000 (as amended) and shall be provided in accordance with an Agreement referred to in section 96 of the Planning and Development Act 2000 (as amended) and in accordance with Part V Ministerial Guidance or any future revised Guidance.

6.2 Housing Strategy Policies

This Housing Strategy sets out the following housing policies:

	It is the Policy of Offaly County Council to:
HP-01	Facilitate the housing needs of the existing and future population of County Offaly through the management of housing development in accordance with the Core Strategy, Housing Strategy and Settlement Strategy.
HP-02	Ensure that groups with special housing needs, such as older people (in accordance with the Age Friendly Strategy for Offaly 2018-2021 and any subsequent editions), single person households, persons with physical and / or learning disabilities, the homeless, the travelling community, asylum seekers and refugees, and those in emergency accommodation are accompanied in a way suitable to their specific needs.
HP-03	Encourage the reuse of upper floors above commercial premises for residential accommodation.
HP-04	Promote the retention of town centre residential units and to discourage their conversion into non-residential uses.
HP-05	Promote social integration and to counteract undue segregation in housing between persons of different social backgrounds.
HP-06	Ensure that new social and affordable housing developments are designed and constructed on the principles of universal design and life-long adaptability, are energy efficient, and of excellent design and contribute to healthy place-making.
HP-07	To ensure that settlements grow in a manner that is self-sustaining with sufficient social and economic infrastructure, and to a scale which aligns with the Settlement Hierarchy prescribed in the Core Strategy.
HP-08	As required under section 95 of the Planning and Development Act 2000 (as amended) that 10% of all land zoned for residential or for a mixture of residential and other uses shall be reserved for the provision of housing for the purposes of meeting social and affordable housing need arising in the county.
HP-09	Promote social inclusion by ensuring that new social and affordable housing developments are strongly integrated into the structure of existing settlements at locations with access to public transport services and community facilities, to ensure that settlements grow in a manner that is self-sustaining with sufficient social and economic infrastructure.
HP-10	Support the work of voluntary and cooperative housing associations in County Offaly.

HP-11	Ensure that there is a balanced supply of private, social and affordable housing such that no settlement in the county experiences an over-concentration of any one type of accommodation.
HP-12	Work with all relevant stakeholders to implement the Midland Housing First Initiative 2020, and any subsequent initiatives to address the accommodation needs of homeless persons.
HP-13	Work with all relevant stakeholders to secure the satisfactory completion of unfinished housing developments in the county.
HP-14	Encourage purpose-built student accommodation proximate to any third level educational facility in County Offaly by foot, bicycle and / or public transport.
HP-15	Reserve sufficient lands to facilitate and implement the Housing Strategy and its policies, as informed by the Housing Need Demand Assessment undertaken as part of this Plan.
HP-16	Provide social housing through a combination of mechanisms including through Part V of the Planning and Development Act 2000 (as amended), through direct build subject to funding, turnkey developments and the acquisition of second-hand housing in accordance with the county's settlement hierarchy to meet the identified social housing needs outlined in the Council's Housing Strategy.

7 Conclusion

The Housing Strategy has been prepared in accordance with the requirements of Part V of the Planning and Development Act 2000 (as amended) as a basis to address the following key issues:

- The identification of housing need within County Offaly;
- The identification of social and specialist housing needs within County Offaly;
- The identification of supply side requirements to satisfy identified needs;
- The consideration of specific policy responses to the above

Through this a population increase of 5,823 has been forecasted in County Offaly over the period of the Development Plan. This in turn results in a total population of 87,200 in 2027 in the County aligning with the transitional Regional and County Population Projections to 2031 outlined in the NPF. The population targets as set out in the Core Strategy, therefore establish a total housing target for the County of 3,803 units over the plan period 2021-2027, the equivalent of 543 units per annum.

Analysis throughout this strategy has determined that 1,227 of the 3,803 additional anticipated households will not qualify for a mortgage during the plan period and that 1,162 of these households do not meet the affordability criteria for private rental. Therefore, it is considered that on average 30.6% of the additional anticipated households over the plan period will have a social (and affordable) housing requirement. While the provision of social housing of up to 10% under Part V Section 91(4)(c) of the Planning and Development Act 2000 will continue to play a role in the delivery of social housing in Co. Offaly, it is apparent that the other delivery channels for social housing discussed throughout this housing strategy will also play a significant role in delivering the identified social housing requirements within the County over the plan period.

The preparation of this strategy has included the assessment of all relevant and up-to-date publications and data resources, which have been analysed in detail to provide a robust basis for future policy development and implementation. In addition to meeting the statutory requirement for its production, this strategy ensures that through proper planning and sustainable development the housing needs of existing and future populations in County Offaly are accommodated in an appropriate manner.