

APPENDIX 1

HOUSING NEED AND DEMAND ASSESSMENT & HOUSING STRATEGY



OUR KILDARE
OUR PLAN

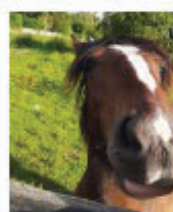
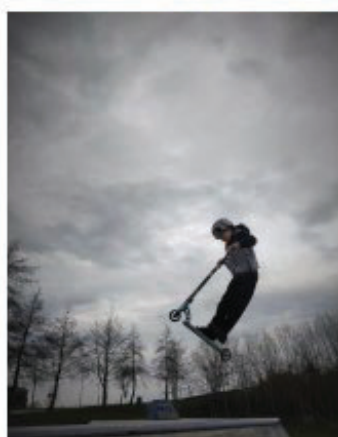


Table of Contents

Executive Summary	i
1. Introduction.....	1
1.1 Housing Need and Demand Assessment	1
1.2 County Housing Requirement & Core Strategy	2
2. Legislation and National / Regional / Local Policy Framework	3
2.1 National and Regional Policy and Guidance	3
2.2 Regional policies and strategies	14
2.3 Local Policies and Strategies	14
3. Housing Market Drivers	19
3.1 Introduction	19
3.2 Population Trends	19
3.2.1 Population	19
3.2.2 Household Demand and Population Projections.....	28
3.3 Housing Market Overview	34
3.3.1 Residential Property Sales	35
3.3.2 Private Rental Market	39
3.4 Existing Economic Overview	42
3.4.1 Employment / Labour Force.....	42
3.4.2 Median Gross Income.....	51
3.4.3 Central Bank Rules and Affordability	51
3.5 Conclusions on Key Housing Market Drivers	53
4. Housing Stock and Housing Need	57
4.1 Existing Housing Stock and Composition	57
4.1.1 Housing Tenure	58
4.1.2 Housing Stock Issues.....	60
4.1.3 Rural Houses.....	65
4.2 Housing Supply.....	67
4.2.1 House Completions	67
4.2.2 House Commencements	70
4.2.3 Unfinished Housing Estates	70
4.2.4 Planning Permissions	70
4.3 Local Authority Housing Stock	79
4.3.1 Housing Stock Issues (Local Authority Housing)	81

4.4	Social Housing Provision.....	82
4.4.1	Social Housing Capital Investment Programme.....	83
4.4.2	Part V Social and Affordable Housing.....	83
4.4.3	Enhanced Long-Term Leasing	83
4.4.4	Repair and Leasing Scheme.....	84
4.4.5	Approved Housing Bodies (AHBs).....	84
4.4.6	Land Aggregation Scheme	85
4.4.7	Social Housing Accommodation Supports	86
4.5	Social Housing Projects.....	87
4.6	Social Housing Trends	89
4.6.1	Social Housing Need	89
4.6.2	Breakdown of Social Housing Need.....	90
4.6.3	Social Housing Demand.....	92
4.6.4	Social Housing Need and Supply.....	93
4.7	Conclusions on Housing Stock and Housing Need	96
5.	Housing Need and Demand Assessment	101
5.1	Housing Supply Targets.....	101
5.2	Household Income Projections.....	101
5.3	House Price Forecast	104
5.4	Rent Price Forecast.....	109
5.5	HNDA Housing Need Estimate	110
6.	Specialist Provision	112
6.1	Older People.....	112
6.2	People with Disabilities.....	116
6.3	Homeless	116
6.4	Travellers.....	117
6.5	International Protection Applicants.....	120
6.6	Third Level Students	121
7.	Policy Objectives to deliver the Housing Strategy	123
7.1	Housing Strategy Key Principles.....	123
7.2	Housing Strategy Objectives	123
7.2.1	General Housing Objectives	124
7.2.2	Social and Specific Housing Objectives	127
7.3	Monitoring & Implementation.....	128

List of Figures

Figure 1 - Population of County Kildare 1991-2016 (Source: CSO).....	19
Figure 2 - Population as a percentage change from preceding census (Source: CSO)	20
Figure 3 - Population Change 2006 to 2016 (Source: CSO & AIRO)	21
Figure 4 - Age Cohorts State and Kildare County, 2006- 2016 (Source: CSO).....	23
Figure 5 - Average Household Size (State, EMRA, Kildare & Municipal District) in 2016 (Source: CSO).....	25
Figure 6 - Population as a percentage change from preceding census (Source: CSO)	31
Figure 7 - Population growth for County Kildare 1991 – 2016 and projected growth 2026 and 2031	32
Figure 8 - Mean House Price Kildare/State 2010-2020 (Source: CSO)	38
Figure 9 - Labour Force participation rate by age, Census 2016	42
Figure 10 - Spatial distribution of labour force participation rate, County Kildare, Census 2016	43
Figure 11 - Principal Economic Status within Kildare County and State, Census 2016.....	44
Figure 12 - Principal Economic Status for each MD in Kildare County, Census 2016	44
Figure 13 - Unemployment Rates as % of Labour Force, Census 2016.....	46
Figure 14 - Unemployment Rates across County Kildare (Census 2016, AIRO)	47
Figure 15 - Kildare Population by Pobal Deprivation Index Classification, 2016 (2016 Pobal HP Deprivation Index)	49
Figure 16 - Pobal HP Deprivation Index, 2016, for County Kildare	50
Figure 17 - Apartments/Flats as a percentage of total housing stock in County Kildare, Census 2016	57
Figure 18 - Nature of Occupancy 2011 and 2016, Kildare County and State (Source: CSO)	59
Figure 19 - Vacancy Rates for State, EMRA, County Kildare and MDs, 2016 (Source: CSO)	61
Figure 20 - Typical BER rating for houses by age for various fuel types (Source: SEAI)	65
Figure 21 - New Dwelling Completions in Kildare 2011-2021 (Q2) (Source: CSO)	68
Figure 22 - New Dwelling Completions in Kildare by LEA, 2020 (Source: CSO).....	69
Figure 23 - First Area of Choice on Housing List, by MD, as of October 2021	92
Figure 24 - GDP rates for Ireland, 2000 – 2020 (Source: World Bank).....	103
Figure 25 - Distribution of Traveller Accommodation Type, Kildare County Council, 2020 (Source: Kildare County Council)	118
Figure 26 - No. of Students as a percentage of total population 15 years and over, Census 2016	121
Figure 27 - No. of Students as a percentage of total population 15 years and over, Census 2016	122
Figure 28 - New entrants to Maynooth University (Source: HEA / Maynooth University)	122

Executive Summary

The National Planning Framework requires local authorities to carry out a Housing Need and Demand Assessment (HNDA). This is a new way of assessing current and future housing need. This evidence will support decisions on housing policy for subsequent county development plans and local area plans.

In April 2021, the Department of Housing, Local Government and Heritage published a new HNDA Tool supported by '*Guidance on the Preparation of a Housing Need and Demand Assessment*'. The HNDA Tool assesses housing need using the latest statistics on the economy and housing. This HNDA Tool gives broad, long-run estimates of housing need for County Kildare for the period 2023 to 2031.

The HNDA follows the format as suggested by the Guidance and is set out over 5 Sections;

- Housing Market Drivers
- Housing Stock and Housing Need
- Housing Need and Demand Assessment (application of the HNDA Tool)
- Specialist Provision
- Conclusions

A table has been provided at the end of both Section 3 (Housing Market Drivers) and Section 4 (Housing Stock and Housing Need) setting out the key issues identified under each section. The final section of this report, Section 7, sets out the policy objectives to deliver the housing strategy, contained in Chapter 3 (Housing Section) of the County Development Plan.

This HNDA assesses the following over the period to 2031:

- The forecast population and households for County Kildare;
- How the economy, household incomes, house prices, and rents will grow;
- What future incomes, prices and rents will mean for housing affordability.
- The housing need for private ownership, private renting, social housing, and affordable housing.

This will assist in planning for new households which will be formed over the lifetime of the HNDA review period. The HNDA finds that for the 9 years, 2023 to 2031, about 30.2% of new households formed in that period will need social housing support, 31.5% will be able to buy a home, 27.7% will be able to rent, and 10.6% will need affordable housing (cost rental or affordable purchase).

The population of County Kildare is expected to grow to 266,500 by 2031. Household size in County Kildare is expected to fall from 3.0 in 2016 to 2.77 in 2031, while the number of new households is expected to increase by 13,840 during the 9-year period between 2023 and 2031. This evidence shows potential issues in the housing market.

The HNDA has been applied to the period 2023 to 2031, a period which covers the next Kildare County Development Plan, 2023-2029, and also aligns with the NPF population projection period and the end of the current Regional Spatial and Economic Strategy (RSES) for the Eastern and Midlands region (EMRA).

1. Introduction

As part of the Development Plan process, each local authority has a statutory obligation to develop a Housing Strategy under section 94 of the Planning and Development Act 2000 (as amended) which will inform the policies and objectives of the Kildare County Development Plan 2023-2029.

The Housing 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. Section 94 (3) of the Act specifies that in preparing such a Housing Strategy, a planning authority shall take into account:

- the existing need and likely future need for housing for the purposes of the provision of social housing support and of housing for eligible households, both within the meaning of the Housing (Miscellaneous Provisions Act) 2009
- 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 older people and persons with disabilities, and
- the need to counteract undue segregation in housing between persons of different social background.

Under the Planning and Development Act 2000 (as amended, most recently by the Affordable Housing Act 2021), one of the key purposes of a Housing Strategy is to provide that a specified percentage (up to 20%) of land for residential use, or for a mixture of residential and other uses, should be reserved for Part V provision, with at least half used for social housing support, and the remainder used for affordable housing, if there is an identified demand, which can be affordable purchase, cost rental or both. If affordable housing is not required, the remaining 10% balance can be used as an additional discount on construction costs or for more social housing.

Section 94(4)(a) of the Act specifies that a housing strategy shall include an estimate of the amount of:

- (i) housing for the purposes of the provision of social housing support within the meaning of the Housing (Miscellaneous Provisions) Act 2009
- (ii) housing for eligible applicants within the meaning of Part 2 of the Affordable Housing Act 2021, and
- (iii) cost rental housing,

required in the area of the development plan during the period of the development plan and the estimate may state the different requirements for different areas within the area of the development plan.

1.1 Housing Need and Demand Assessment

The management of the future location, typology and tenure of housing is a key function of the Housing Strategy and requires a robust evidence base; therefore, a Housing Need and Demand Assessment (HNDA) is integral to this Housing Strategy. The requirement for a HNDA is set out in the National Planning Framework (NPF), specifically NP037. The HNDA has been prepared in line with Circular 14/2021 HNDA and 'Guidance on the Preparation of a Housing Need and Demand Assessment'.

(DHLGH, April 2021), and, as outlined in Section 1 above, follows the format as suggested by the Guidance and is set out over 5 Sections:

1. Key Housing Market Drivers
2. Housing Stock Profile and Pressures, Existing Need and Management Issues
3. Estimating Future Housing Need and Demand
4. Specialist Provision
5. Conclusions

The HNDA has been prepared by the Policy and Research Unit of Kildare County Council, in conjunction with Kildare County Council's Housing section (the Housing Authority), and with support and expert research and statistical analysis by AIRO (All-Island Research Observatory).

1.2 County Housing Requirement & Core Strategy

The Core Strategy is contained in Chapter 2 of the County Development Plan and sets out projected housing supply and population growth target for the county. The Settlement Strategy, which is also set out in Chapter 2 of the Plan, addresses where housing will be provided in line with the Settlement Hierarchy for the county.

This HNDA considers the overall demand for housing (including social and affordable housing demand) in terms of the nature of housing required, and the housing types etc. that will be necessary to provide housing for an inclusive and sustainable society. In this respect there is a clear overlap between the Core Strategy, Settlement Strategy and the Housing Strategy as follows;

- (a) The Core Strategy and Settlement Strategy sets out where housing will be delivered along with the amount of land required for housing, ensuring phased delivery of services, including water, wastewater and transport in delivering housing on such lands,
- (b) The Housing Strategy and HNDA provide an evidence base for the formulation of housing policy and the delivery of housing across all tenures and typologies in accordance with statutory guidelines.

This HNDA has considered a range of data sources, including national data and the sources of information as listed in the Guidance on the Preparation of a Housing Need and Demand Assessment' (DHLGH, April 2021). Data from the Council's own information systems has also been used as appropriate.

2. Legislation and National / Regional / Local Policy Framework

The relevant national, regional and local planning and associated housing legislation, policies and plans have been assessed which includes the following:

2.1 National and Regional Policy and Guidance

- The Planning and Development Act, 2000 (as amended)
- The Housing (Miscellaneous Provisions) Act 2009
- Urban Regeneration and Housing Act 2015 (as amended)
- Affordable Housing Act 2021
- Circular 23/2021 Affordable Housing Fund (AHF) Scheme
- Land Development Agency Act 2021
- Planning and Development & Residential Tenancies Act 2016 & Planning & Development Regulations 2017
- Planning and Development (Amendment) (Repeal of Part V Leasing) Bill 2021
- Residential Tenancies (No. 2) Act 2021
- Residential Tenancies (No. 3) Bill 2021
- Project Ireland 2040 - National Planning Framework (2018)
- Implementation Roadmap for the National Planning Framework (2018)
- Project Ireland 2040 - National Development Plan 2018-2027
- Housing Supply Target Methodology for Development Planning - Guidelines for Planning Authorities (2020)
- Guidance on the Preparation of a Housing Need and Demand Assessment (2021)
- Design Standards for New Apartments - Guidelines for Planning Authorities (2020)
- Rebuilding Ireland – Action Plan for Housing and Homelessness (2016)
- Housing for All (2021) / Programme for Government: Our Shared Future (2020)
- Housing for All – A New Housing Plan for Ireland (2021)
- Housing & Sustainable Communities Agency Strategic Plan, Housing Agency 2019
- Social Housing Strategy 2020: Support, Supply and Reform
- National Vacant Housing Reuse Strategy 2018-2021
- National Housing Strategy for Disabled People 2022-2027
- Statement of Housing Options for Our Aging Population (2020) and Age Friendly Principles and Guidelines for the Planning Authority (2021)
- National Student Accommodation Strategy (2017)
- Sustainable Rural Housing Development Guidelines (EHLG, 2005)
- Sustainable Residential Development in Urban areas (DHLGH, 2009)
- Urban Development & Building Height Guidelines for Planning Authorities (DHLGH, 2018)
- Quality Housing for Sustainable Communities, Best practice guidelines (DEHLG, 2007)
- Design Manual for Urban Roads and Streets (DTTS & DECLG, 2013)
- Sustainable Urban Housing: Design Standards for New Apartments Guidelines for Planning Authorities (2020)
- Sustainable Residential Development in Urban Areas, Guidelines for Planning Authorities (2009)

In order to provide some context to the relevant legislation, policy and guidance, a selection of the above documents is presented below.

The Planning and Development Act 2000 (as amended)

Part V of the Planning and development Act 2000 (as amended) relates to the issue of housing supply. This Section of the Act has been subject to several changes since it was first introduced. Changes of note for the purposes of the preparation of the Housing Strategy and HNDA are the amendments brought about by:

- Housing (Miscellaneous Provisions) Act 2009
- Urban Regeneration and Housing Act (2015)
- Planning and Development (Amendment) Act 2015
- Planning and Development (Amendment) Act 2018
- Affordable Housing Act 2021
- Land Development Agency Act 2021

As noted, there have been significant changes in planning legislation and policy since the previous Housing Strategy was prepared. In particular, the Housing Strategy must be consistent with the National Planning Framework (NPF) and the Regional Spatial and Economic Strategy (RSES) for the Eastern and Midlands region (EMRA). In line with National Policy Objective 37 of the National Planning Framework (NPF), Kildare County Council has undertaken a Housing Need and Demand Assessment (HNDA) which estimates the number of additional housing units to meet existing and future housing need and demand.

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 allocate social housing support which incorporates 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 through leasing or contract arrangements with private landlords.

Urban Regeneration and Housing Act 2015

Part V of the Planning and Development Act 2000 (Part V) provides for social and affordable housing obligations for developers. A number of amendments were made to Part V by the Urban Regeneration and Housing Act 2015 with the aim of making more social housing available and to provide for transparency in the Part V process. Where a residential scheme is greater than 9 units there is a social housing requirement of up to 10%. The option of making a payment in lieu of social housing is no longer permitted. Part V obligation can be met as follows:

- Transfer of undeveloped land within the application site to the local authority for the provision of social housing.

Instead of the transfer of land, a Part V agreement may provide for:

- Build and transfer the housing units within the application site
- Transfer units on other land within the functional area of the local authority
- Grant of a lease of houses within the application site or the function area, or
- a combination of the above

In considering whether to enter into an agreement (other than a transfer of undeveloped land within the application site), the planning authority shall consider each of the following:

- (i) whether such an agreement will contribute effectively and efficiently to the achievement of the objectives of the housing strategy;
- (ii) whether such an agreement will constitute the best use of the resources available to it to ensure an adequate supply of housing and any financial implications of the agreement for its functions as a housing authority;
- (iii) the need to counteract undue segregation in housing between persons of different social background in the area of the authority;
- (iv) whether such an agreement is in accordance with the provisions of the development plan;
- (v) the time within which housing referred to in section 94(4)(a) is likely to be provided as a consequence of the agreement.

The Urban Regeneration and Housing Act 2015 also introduced a vacant site levy¹. Section 5 of the 2015 Act defines a vacant site as a site (land exceeding 0.05 hectares) consisting of residential land that is situated in an area in which there is a need for housing, the site is suitable for the provision of housing, and the majority of the site is vacant or idle. A site may also be considered a vacant site under the 2015 Act in the case of a site consisting of regeneration land where the majority of the site is vacant or idle, and the site being vacant or idle has adverse effects on existing amenities, reduces the amenity provided by existing public infrastructure and facilities in the area in which the site is situated, or has adverse effects on the character of the area.

The purpose of the levy is to encourage the development of vacant sites and to reduce land hoarding, by making a fee payable by landowners who have been taking up land rather than developing it for housing.

Planning and Development (Amendment) Act, 2015

New legislation enacted on 29 December 2015, amended and extended sections of the Act, with the following key effects:

- Planning authorities are now required to have regard to Ministerial guidelines and specific planning policy requirements in the performance of their functions.
- Streamlining of the assessment of applications for modifications to existing planning permissions for multi-unit housing schemes on foot of new apartment standard guidelines.
- Changes were made to the planning process in respect to strategic development zones (SDZs). If when appealed to An Bord Pleanála, modifications of a material nature are deemed necessary the whole SDZ planning scheme process does not need to start again.
- A planning authority may make an application to An Bord Pleanála for an amendment to a previously approved SDZ scheme which may be under development.

Planning and Development (Amendment) Act, 2018

The Planning and Development (Amendment) Act, 2018 was signed into law on 19th July 2018. Section 12 of the Act amends section 11 of the Planning and Development Act 2000 (as amended) to provide for the incorporation of the National Planning Framework and a regional spatial and economic strategy into a development plan.

¹ Budget 2022 provides for a new Zoned Land Tax, which will replace the Vacant Site Levy once introduced.

Affordable Housing Act 2021

The purpose of this Act is to provide the legislative and policy framework for new schemes aimed at making housing for purchase and rent more affordable for eligible households.

These include:

- **an Affordable Purchase Shared Equity Scheme** for the delivery of homes by private developers - where the State will take an equity share in the property through a special purpose vehicle (SPV). Details of how this will work will be set out in an agreement between the Minister for Housing and the SPV; and
- **a new form of cost rental tenure** - The tenant will pay rent that reflects the cost of providing managing, and maintaining the property only, which should result in lower than market rent. Cost rental homes are aimed at those who are not eligible for, or don't wish to avail of social housing and will be covered by the Residential Tenancies Acts 2004-2020.

In addition, Part V of the Planning and Development Acts 2000 to 2020 has been amended by the Affordable Housing Act 2021.

These changes to Part V primarily apply to land purchased on or after 1 August 2021. Any new planning permissions for housing development on that land will have a 20% Part V requirement.

- At least half of the Part V provision must be used for social housing support
- The remainder can be used for affordable housing, which can be affordable purchase, cost rental or both.

A 10% Part V requirement will apply where land already has planning permission or was purchased between 1 September 2015 and 31 July 2021 and planning permission is granted before 31 July 2026.

The Act also stipulates that 'Housing Strategies' within local authority development plans must in future include an estimate of how much social, affordable purchase and cost rental housing is required in the area. The housing strategy must specify a percentage (not more than 20%) of land to be reserved for the delivery for social, and, if applicable, affordable, and cost rental housing under Part V. Where there is a housing strategy already in place, the local authority chief executive must estimate the affordable purchase and cost rental requirements, and such estimate shall be deemed to be included in the housing strategy concerned.

Circular 23/2021 Affordable Housing Fund (AHF) Scheme

The Circular issued by the Department of Housing Local Government and Heritage (25th June 2021) states that the AHF scheme replaces the Serviced Site Fund (SSF) which was detailed under previous Circulars APH 01/2018 and APH 02/2019. The purpose and function of funding support available is to assist in the delivery of affordable housing. Notwithstanding the fact that funding will continue to be targeted at the provision of infrastructure that will facilitate delivery of affordable housing on local authority lands, it will no longer be limited to costs of servicing of sites for housing. The Circular states that funding will be specifically targeted at areas where a strong demand for affordable housing units is evidenced, by reference to a Housing Need and Demand Assessment (HNDA) carried out in accordance with the guidance to local authorities circulated in April 2021 or other verifiable data indicating a strong, evidence-based affordable housing need. Where an Assessment for an administrative area has been undertaken using the specific HNDA Guidance and Tool, it will form the sole basis of determination of a strong demand for affordable housing units.

Land Development Agency Act 2021

This Act gives a statutory remit to the Land Development Agency (**LDA**), which was first established by statutory instrument in 2018. The Act sets out the functions and structure of the LDA, which will be established as a designated activity company (**DAC**). The LDA will be able to borrow money for the purposes of undertaking its functions and will also be eligible for Government grants.

The LDA will be obliged to establish a Register of Relevant Public Land to identify land in urban population centres over 10,000 that can be made available for housing. The LDA will be required to report to the Government in relation to public land on the Register, which could be suitable for housing or urban development and the Government may decide that certain land be transferred to the Agency for such purposes.

Local Authorities wishing to dispose of land must give the LDA first refusal to acquire the land at market value. The LDA will also be empowered to acquire land by compulsory purchase, in certain circumstances.

Aside from the provision of social housing, at least 50% (80% in large urban areas) of any housing provided on relevant public land must be made available for cost rental or affordable housing by the LDA or any other party which acquires such land.

In November 2021, the LDA launched Project Tosaigh, under which the LDA would enter into ‘forward purchase’ transactions with housebuilders / landowners, to unlock land with full planning permission that is not being developed by private sector owners due to financing and other constraints and use it to accelerate the supply of affordable housing.

Planning and Development & Residential Tenancies Act 2016 & Planning & Development Regulations 2017

Planning applications for housing developments of more than 100 residential units and 200 plus student bed spaces can now be made directly to An Bord Pleanála.

Planning and Development (Amendment) (Repeal of Part V Leasing) Bill 2021

Residential Tenancies (No. 2) Act 2021

With reference to Rent Pressure Zones (RPZs), the purpose of this Act is to require that annual rent increases in RPZs are capped in line with general inflation. Previously, rent increases in RPZs were capped at 4% per year. RPZs were also extended until 31 December 2024. They were due to expire on 1 January 2022.

Residential Tenancies (No. 3) Bill 2021

Project Ireland 2040: National Planning Framework

The National Planning Framework (NPF) is a government plan for action and delivery between 2018 and 2040. The NPF, supported by the National Development Plan (NDP), is the Government’s high-level strategic plan for shaping the future growth and development of the country to the year 2040. The NPF sets out 10 National Strategic Outcomes and 75 National Policy Objectives. The purpose of the NPF is to enable all parts of Ireland, whether rural or urban, to successfully accommodate growth and change, by facilitating a shift towards Ireland’s regions and cities other than Dublin, while also recognising Dublin’s ongoing key role. The NPF will be implemented at a regional level through the Regional Spatial Economic Strategies (RSEs) and at county level through development plans and local area plans. It is also implemented through other plans and programmes at national and regional level

such as the National Climate Change Strategy, the National Development Plan and the Transport Strategy for the Greater Dublin Area 2016-2035.

National Policy Objective 37 of the National Planning Framework (NPF) provides for a Housing Need and Demand Assessment (HNDA) to be undertaken in each local authority area. A Housing Need and Demand Assessment estimates the number of additional housing units to meet existing and 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 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.

The purpose of the HNDA is to:

- Assist Kildare County Council to develop long-term strategic goals to address 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;
- Provide evidence to inform policies related to the provision of specialist housing and housing related services.

Implementation Roadmap for The National Planning Framework (2018)

The Roadmap sets out the way forward by addressing a number of implementation matters following the publication of the NPF. Matters addressed in the Implementation Roadmap include:

- 1) Legal Status and Project Governance;
- 2) Enactment of legislation for the statutory underpinning of the NPF and alignment of County Development Plans;
- 3) Regional Spatial and Economic Strategies (RSEs), including: a. Transitional Population Projections; b. Metropolitan Areas; c. Regional Centres – Plan Preparation;
- 4) Urban and Rural Regeneration and Development Fund;
- 5) The National Regeneration and Development Agency.

Project Ireland 2040 - National Development Plan 2018-2027

The National Development Plan and the National Planning Framework combine to form Project Ireland 2040. The National Planning Framework (NPF) sets the vision and strategy for the development of the country to 2040 and the National Development Plan (NDP) provides enabling investment to implement the strategy.

The National Development Plan 2018-2027 states that through a planned capital investment of over €4.2 billion for the period 2018 to 2021, it will support the delivery of some 40,000 new social housing

homes by that date. This will be achieved through direct Local Authority build, acquisitions, rejuvenation of formerly empty homes and provision by housing bodies, to reduce social housing waiting lists and ensure a sustainable supply of social housing through future appropriate investment in line with projected demand. The NPF advises that adding more properties to areas that are already dense with social housing, or to areas that are unable to support further population, can create serious problems within communities. Diverse neighbourhoods with a balance of public and private housing create the healthiest communities.

The NDP highlights that in addition to the focused investment in social housing over the coming years, the NDP investment will also facilitate the delivery of more affordable homes to buy and rent, through co-ordinated and efficient provision of enabling infrastructure and services on publicly owned sites, leveraging the value of the land to provide mixed-tenure developments and providing flexibility on design and density, particularly in urban cores, to enable more cost-efficient construction and variety of homes aimed at first-time buyers.

Housing Supply Target Methodology for Development Planning Guidelines for Planning Authorities² issued under Section 28 of the Planning and Development Act, 2000 (as amended) December 2020

The Section 28 Planning Guidelines ‘Housing Supply Target Methodology for Development Planning’ was issued by the Department of Housing, Local Government and Heritage in December 2020. The Guidelines state that their purpose is to assist planning authorities in appropriately integrating the strategic national and regional population parameters into the preparation of their county development plans and the preparation of their housing strategies, informed by the Housing Need and Demand Assessment (HNDA) process. The Guidelines note that uncoordinated local practices thus far, which utilised differing assumptions and methodologies, have militated against achieving a consistent approach to translating the projected population for a county, into demand for housing over the development plan period. The Department tasked the Economic and Social Research Institute (ESRI)³ with providing a nationally integrated and standardised evidence base for local authorities to estimate overall housing demand.

This ESRI research applies the projection model to four different development scenarios:-

- Baseline – projecting a ‘business as usual’ scenario which is based on current trends and medium-term projections for the Irish economy;
- NPF 50:50 City – consistent with the NPF strategy;
- High Migration – incorporating assumptions around high international migration flows into Ireland based on higher economic growth than the baseline;
- Low Migration – incorporating assumptions around lower international migration flows into Ireland based on lower economic growth than the baseline.

The ESRI research model enables structural household demand levels for each local authority area to be set out under the four different scenarios for each year to 2040, thereby facilitating use by Kildare County Council for the county development plan and the Housing Strategy/HNDA preparation processes.

² <https://www.gov.ie/en/publication/6d48f-ministerial-letter-to-local-authorities-structural-housing-demand-in-ireland-and-housing-supply-targets>

³ Regional Demographics and Structural Housing Demand at a County Level, Research Series, Number 111, Economic and Social Research Institute, December 2020.

NPF Scenario

The guidelines state that the NPF 50:50 City scenario is broadly consistent with the National Planning Framework strategy and consequently, the 2018 NPF 'Roadmap' document and the population parameters specified therein. It results in an alternative spatial distribution, where population growth is more evenly distributed between the Eastern and Midland regional assembly area and the rest of the country and where counties with larger cities attract higher inflows. The identified NPF 50:50 City scenario is therefore the recommended housing demand scenario to be used by planning authorities in order to plan for the provision of housing to meet projected levels of demand in accordance with the NPF strategy. The guidelines state that deviation from this scenario must be evidence-based and consistent with these guidelines.

Methodology for the Application of NPF Population and Housing Projections

Appendix 1 of the Housing Supply Target Methodology for Development Planning Guidelines for Planning Authorities issued under Section 28 of the Planning and Development Act, 2000 (as amended) provides projected housing demand for each local authority area for the period 2020-2031 based on the NPF Scenario.

Table 5: Kildare County Council		Annual Average	Total Households
A	ESRI NPF scenario projected new household demand 2017 to 2031	1,483	22,238
B	Actual new housing supply 2017-19	1,368	4,104
C	Homeless households, and estimated unmet demand as at Census 2016	N/A	291
D	Housing Demand 2020-31 =Total (A-B+C)/12	1,535	18,425

Convergence Scenario

The Housing Supply Target Methodology for Development Planning Guidelines for Planning Authorities also provides for a convergence period towards the NPF scenario to 2026, recognising that housing demand projections associated with existing spatial patterns (i.e. the baseline) will need a period to align with the NPF strategy projection. This also enables planning for increased housing supply in certain circumstances within the period to 2026, as set out in Section 4 of the Guidelines, where supported by a justification within the criteria specified.

Guidance on the Preparation of a Housing Need and Demand Assessment, Department of Housing, Local Government and Heritage

A HNDA Framework has been developed by the Department of Housing, Local Government and Heritage to ensure a standardised methodology that allows local authorities to assess local housing needs, existing and future, using consistent evidence bases and within a standardised framework. The HNDA Framework methodology also involves capturing information on the operation of the housing system that will assist Kildare County Council to develop policies on new housing supply, in the management of existing stock and in the provision of housing related services. A specific HNDA Tool has been developed by the Department of Housing, Local Government and Heritage to assist local authorities in calculating the projected number of homes that are likely to be required to meet the estimated need over the determined period, broken down by tenure type. The HNDA preparation process is summarised in the guidance as follows:

1.	Decide the time period that the HNDA will cover
2.	Compile section 1 on Housing Market Drivers
3.	Compile section 2 on Housing Stock
4.	Select the scenarios to run in the HNDA Tool
5.	Having regard to the results from the HNDA Tool, compile section 3 on estimating total additional housing units required in the local authority area over the period selected and broken down into tenure type
6.	Compile section 4 on specialist housing need (including stakeholder consultation)
7.	When complete, sign off the HNDA (Director of Service for Housing and Director of Service for Planning)
8.	Incorporate the HNDA results into housing policy within the Housing Strategy

Rebuilding Ireland – An Action Plan for Housing and Homelessness (2016)

The Action Plan states that the overarching aim is to ramp up delivery of housing from its current under-supply across all tenures to help individuals and families meet their housing needs, and to help those who are currently housed to remain in their homes or be provided with appropriate options of alternative accommodation, especially those families in emergency accommodation. The Plan has set a target to double the annual level of residential construction to 25,000 homes and to deliver 47,000 units of social housing in the period to 2021, while at the same time making the best use of the existing housing stock.

The five key pillars of the Plan are:

Pillar 1 – Address Homelessness - Provide early solutions to address the unacceptable level of families in emergency accommodation; deliver inter-agency supports for people who are currently homeless, with a particular emphasis on minimising the incidence of rough sleeping, and enhance State supports to keep people in their own homes.

Pillar 2 – Accelerate Social Housing - Increase the level and speed of delivery of social housing and other State supported housing.

Pillar 3 – Build More Homes - Increase the output of private housing to meet demand at affordable prices.

Pillar 4 – Improve the Rental Sector - Address the obstacles to greater private rented sector delivery, to improve the supply of units at affordable rents.

Pillar 5 – Utilise Existing Housing - Ensure that existing housing stock is used to the maximum degree possible - focusing on measures to use vacant stock to renew urban and rural areas

Housing For All (2021) / Programme for Government: Our Shared Future (2020)

The ‘Programme for Government: Our Shared Future’ was published in June 2020 and sets out key goals the Government will pursue over its term. This Programme places emphasis on housing policy through the ‘Housing for All’ mission. ‘Housing for All’ is based on eight pillars setting a five-year vision for housing policy:

- Put affordability at the heart of the housing system.
- Prioritise the increased supply of public, social and affordable homes.
- Progress a State-backed affordable home purchase scheme to promote home ownership.
- Increase the social housing stock by more than 50,000, with an emphasis on new builds.
- Tackle homelessness.
- Ensure local authorities are central to delivering housing.
- Work with the private sector to ensure an appropriate mix and type of housing is provided nationally.
- Improve the supply and affordability of rental accommodation and the security of tenure for renters.

Housing for All – A New Housing Plan for Ireland (2021)

Housing for All – A New Housing Plan for Ireland (2021), was published by the Department of Housing, Local Government and Heritage in September 2021. The plan expands on the Government’s *Programme for Government: Our Shared Future (2020)* and replaces the Government’s *Rebuilding Ireland – An Action Plan for Housing and Homelessness (2016)* as the main national housing strategy.

The overall aim of the new housing plan for Ireland is that everyone in Ireland should have access to sustainable, good quality housing to purchase or rent, at an affordable price, in the right location.

In total, the new housing plan contains 213 separate actions under four separate pathways aimed at achieving the following objectives:

1. Supporting homeownership and increasing affordability;
2. Eradicating homelessness, increasing social housing delivery and supporting social inclusion;
3. Increasing new housing supply; and
4. Addressing vacancy and efficient use of existing stock.

Housing & Sustainable Communities Agency Strategic Plan, Housing Agency 2019

Sets out how the Housing Agency will support ‘Rebuilding Ireland’ and work with the Department of Housing, Planning and Local Government, Local Authorities, Approved Housing Bodies, the private sector and others in the housing sector to build sustainable communities. The Housing Agency focuses on five interconnecting themes:

- Being a centre of knowledge on housing
- Optimising supply and utilisation of housing
- Understanding housing demand and affordability
- Realising results through our people
- Meeting governance and service commitments

Social Housing Strategy 2020: Support, Supply and Reform

The Social Housing Strategy 2020: Support, Supply and Reform was published in November 2014. It sets out plans for the delivery of more social housing and for a range of changes to various aspects of social housing assessment, delivery and financing. Its implementation involves a resumption of direct building by the State. There are three central pillars in the Social Housing Strategy:

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 Agency.

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.

The Strategy notes that an enhanced role for Approved Housing Bodies (AHB) in the provision of new supply will be central to the Government's vision for the provision of social housing supports.

National Vacant Housing Reuse Strategy 2018-2021

Aims to reactivate recoverable and liveable vacant homes to assist in meeting housing needs, in line with the NPF objectives for the utilisation of existing housing stock and for HNDA. It focuses on vacant housing, both private and social, and includes vacant individual houses, apartment blocks and individual units within those blocks. Five key objectives are set out below:

- Measures to ensure vacant and underused privately owned properties are brought to use
- Measures to minimise vacancy in Social Housing Stock
- Robust, accurate, consistent and up-to-date data on vacancy
- Support to ensure suitable vacant properties held by banks, financial institutions and investors are acquired for social housing use
- Cross-sector relationships/partnerships to address vacant housing

National Housing Strategy for Disabled People 2022-2027The Vision for the Strategy is to facilitate disabled people to live independently with the appropriate choices and control over where, how and with whom they live, promoting their inclusion in the community and to further enable equal access for disabled people to housing with integrated support services.

Statement of Housing Options for Our Aging Population, 2020

Joint policy by the Department of Housing, Planning and Local Government and the Department of Health to encourage and facilitate timely planning by older people, to enable them to remain living independently in their own homes and communities for longer. The aim is to provide choice by developing a range of housing options that are suited to elderly needs, so they can plan ahead and choose the right home for them. Two key actions as outlined in Rebuilding Ireland are as follows:

- 2.18: Policy options for supported housing/housing with care so that older people have a wider range of residential care choices.
- 5.8: Explore ways to promote the availability of stepdown, specialist housing for older people and incentivise down-sizing, where appropriate.

The policy statement provides a framework by which the Government can facilitate and promote a variety of housing options, including housing with care/supported housing, for older people. It also identifies a programme of actions required to progress and evolve data gathering, research, policy options, services and departmental and agency collaboration. The actions and policies outlined are supported by Age Friendly Ireland and other related initiatives and programmes.

National Student Accommodation Strategy 2017

The National Student Accommodation Strategy is designed to ensure that there is an increased level of supply of purpose-built student accommodation (PBSA) to reduce the demand for accommodation in the private rental sector by both domestic and international students attending our Higher Education Institutions (HEIs). The Strategy states that housing for students is a specific and important segment of the overall housing sector with distinct characteristics and requirements. This has a significant related impact on the private rental sector and an increase in the provision of student accommodation is a key priority in addressing the housing crisis. The Strategy further highlights that the demand for student accommodation is strongest in Ireland's major cities (the Strategy refers to "Dublin, or within 25km of Dublin", which would include Maynooth University). The Strategy details

that 1,117 bed spaces have been completed since the launch of the Rebuilding Ireland Action Plan and of this, 296 were in Maynooth. The strategy targets include delivery of a significant increase in new PBSA bed spaces (an additional 21,000 nationally by 2024) as well as increasing the number of students taking up 'digs' accommodation.

2.2 Regional policies and strategies

Regional policies and strategies provide the policy link between national policies and guidance documents and local authority planning policies and decisions. The principal statutory purpose of the RSES is to support the implementation of Project Ireland 2040 - The National Planning Framework (NPF) and the National Development Plan (NDP). Therefore, it provides a development framework for the region through the provision of a Spatial Strategy, Economic Strategy, Metropolitan Area Strategic Plan (MASP), Investment Framework and Climate Action Strategy.

The Regional Spatial and Economic Strategy (RSES) is a strategic plan and investment framework to shape future development and to better manage regional planning and economic development throughout the Region. It identifies the Eastern and Midland Region's key strategic assets, opportunities and challenges and provides policy responses in the form of Regional Policy Objectives, to ensure that people's needs – such as access to housing, jobs, ease of travel and overall well-being – are met.

A Metropolitan Area Strategic Plan (MASP) forms part of the Strategy, which identifies several large scale strategic residential and economic development areas, that will deliver significant development in an integrated and sustainable manner in the metropolitan area, of which the area of Maynooth, Leixlip, Celbridge and Kilcock form part with respect to County Kildare (northeast of the county).

The Planning and Development Act 2000 (as amended) places an obligation on the planning authority to prepare a 'core strategy' which shows that the development objectives in the plan are consistent, as far as practicable, with national and regional development objectives set out in the National Planning Framework and the Regional Spatial and Economic Strategy. Chapter 2 of the Kildare County Development Plan 2023-2029 sets out the Core Strategy and Settlement Strategy for County Kildare. Therefore, the Housing Strategy is required to align with the population projections contained in the Core Strategy.

2.3 Local Policies and Strategies

Climate Resilient Kildare: Kildare County Council Climate Change Adaptation Strategy 2019 – 2024

One of the cross-cutting principles of the County Development Plan and the Housing Strategy is to initiate a transition to a low carbon and climate resilient society, a necessary measure that is also a National Strategic Outcome (NSO 8) of the National Planning Framework. In tackling global warming, a comprehensive legislative and policy framework relating to climate action has been developed in Ireland over the past number of years. These provisions seek to ensure that climate considerations are fully integrated into spatial plans.

Whilst the primary long-term goal is to achieve net zero emissions by 2050 (Climate Action Plan, 2021), recent policy developments reflect a widespread acceptance that climate change is happening now, and its effects will only get more disruptive to both societies and the environment. Therefore, there is increasing emphasis on plans integrating mitigation and adaptation measures. In this regard, the Kildare's Climate Adaptation Strategy 2019-2024 has provided a critical point of reference in preparing this strategy and the County Development Plan. The publication of the first Kildare County Council

Climate Adaptation Strategy (2019), as provided for under the Low Carbon Development Act 2015, signalled the beginning of a coordinated cross-departmental approach to implementing climate mitigation and adaptation measures. Accordingly, the strategy contains an adaptation framework which incorporates objectives and actions that encompass all services, functions and operations of the Council. The strategy is centred around six complementary high-level goals with each one containing a suite of relevant actions directed by specific objectives.

Kildare Age Friendly Strategy 2019-2021

The Kildare Age Friendly County Programme was launched in 2010 and is now fully embedded in the workings of Kildare County Council. The programme aims to work within existing community structures, networks and service providers in order to make Kildare a great place to grow old. The programme is led by the Kildare Age Friendly County Alliance, comprising older people's representatives and senior decision makers from key public, private and not for profit agencies.

The ageing of our population from this point onwards will represent one of the most significant demographic and societal developments that Ireland has encountered. The number of people over the age of 65 in Ireland is expected to increase substantially, reaching 1.4 million by 2040 or about 23% of the total population. Across this same period the number over the age of 80 is set to quadruple. According to Census 2016, there were 22,104 people over 65 living in Kildare in that year, representing 10% of the county's population, but what's more significant is that the figure represented a 32.2% increase in that cohort of the population from the 2011 census.

The aging profile of the population has considerable implications for public policy areas such as housing, health, urban and rural planning, transport, policing, the workplace and the business environment.

Under its Age Friendly Cities and Communities programme, the World Health Organisation has identified eight themes that are key areas in the lives of older people (1. Outdoor Spaces & Buildings, 2. Transportation, 3. Housing, 4. Respect & Social Inclusion, 5. Social Participation, 6. Communication and Information, 7. Civic Participation and Employment, 8. Community Support & Health Services). The Kildare Age Friendly Strategy 2019-2021 aims to address the needs of older people in Kildare across all of these themes.

In relation to housing, the Strategy lists four aims and objectives:

1. **AIM:** To plan and assess future housing needs of older people in County Kildare through housing needs assessments.
OBJECTIVE: To continue to consult housing needs assessment in the context of future delivery of social housing units.
2. **AIM:** To support the provision of older person housing through approved housing bodies.
OBJECTIVE: Continuing support for older persons housing through approved housing bodies, particularly in the context of Capital Assistance Scheme [CAS] funding.
3. **AIM:** To meet the requirement of lifetime adaptability in housing needs.
OBJECTIVE: To provide a percentage of housing in new social housing developments constructed with lifetime adaptability in mind. In some instances, end user specific housing is constructed where a tenant with a specific need is identified at the design stage need.
4. **AIM:** To support householders to remain in their homes and sustain independent living as they get older, through the provision of the Housing Aid for Older People Grant scheme, the Housing Adaptation for Persons with a disability scheme and the mobility aids housing grant scheme (subject to eligibility criteria).

OBJECTIVE: Schemes will continue subject to availability of funding from Department of Housing, Planning and Local Government.

Kildare County Council Traveller Accommodation Programme 2019–2024

The Housing (Traveller Accommodation) Act 1998 requires Kildare County Council to adopt a Traveller Accommodation Programme (TAP) to meet the accommodation needs of Travellers within their functional area for the period specified in the programme. The aim of the programme is:

- 1) To enhance the management and services to the current Traveller specific housing stock through planned maintenance and upgrades to current stock;
- 2) To provide Traveller specific housing units within the county through capital funding for new builds; and
- 3) To develop basic services including the provision of temporary sites, to directly improve the living standards of Traveller families who are homeless and are awaiting permanent accommodation.

Review of Traveller Accommodation Programme 2014-2018

The Traveller Accommodation Programme 2014-2018 envisaged that 65 units of accommodation would be required during the lifetime of the programme based on an existing need of forty-nine families and a projected need for a further sixteen family formations. The TAP 2014-2018 Programme therefore, aimed to deliver 76 units of accommodation- 55 standard units and 21 Traveller specific units of accommodation. During the life of the programme, there were 71 units of accommodation delivered across standard and Traveller specific housing. Overall, Kildare County Council successfully delivered 93% of the overall accommodation targets set out in the 2014-2018 programme.

Implementation of Traveller Accommodation Programme 2019-2024

The Traveller Accommodation Programme 2019-2024 aims to deliver 73 units of accommodation to Traveller families over the five-year period, with 28 of these units proposed as additional Traveller-specific accommodation. As of December 2021, 43 standard housing units and 6 Traveller-specific accommodation units have been provided. The TAP is subject to a mid-term review (2022) and this will demonstrate an update on existing and future needs. The Council is committed to the provision of Traveller specific accommodation in line with objectives set out in national, regional and local plans.

An account of the Equality Review carried out by Kildare County Council in respect of Traveller-specific accommodation⁴ Irish Human Rights and Equality Commission (published 2021)

In June 2019 the Irish Human Rights and Equality Commission invited Kildare County Council to undertake an equality review in the following terms:

1. That the Council would conduct an audit of the level of equality of opportunity and/or discrimination that exists in relation to members of the Traveller community who wish to avail of Traveller-specific accommodation, having regard to the drawdown by the Council of capital funding provided by the Department of Housing, Planning and Local Government for the provision of Traveller-specific accommodation having regard to the Council's obligations under the ESA (Equal Status Acts 2000-2018); and

⁴ An account of the Equality Review carried out by Kildare County Council in respect of Traveller-specific accommodation - Irish Human Rights and Equality Commission (published 2021)

https://www.ihrec.ie/app/uploads/2022/08/Kildare-CC-Equality-Review-IHREC_Final.pdf

2. That the Council would conduct a review of its practices, procedures, and other relevant factors in relation to the drawdown of capital funding and the provision of Traveller-specific accommodation services to Travellers to determine whether those practices, procedures and other relevant factors are conducive to the promotion of equality of opportunity for these service users having regard to the Council's obligations under the ESA.

The Commission's account of the Council's Equality Review comprises three sections, namely:

1. Key areas of interest – which is a synopsis of the Equality Review undertaken, and the information provided, by the Council;
2. Issues arising – which comprises the Commission's consideration of the information contained in the Equality Review as undertaken by the Council; and
3. Recommendations – proposed recommendations from the Commission to the Council.

The Commission recommended that the Council undertake the following 6 no. specific actions to strengthen the level of equality of opportunity and non-discrimination in its systems for the provision of Traveller-specific accommodation services:

1. Address policy and procedure for:
 - tracking and verifying the preferences of the Traveller community in relation to type of accommodation and ensuring a respect for Traveller culture and identity in meeting these;
 - in light of recent developments, review current processes for Traveller participation in estate management on Traveller-specific accommodation to ensure its effectiveness;
 - identifying and responding to specific needs of Travellers that flow from their distinct culture and identity, particularly in relation to horse ownership and accommodation for their horses;
 - reviewing the provisions in relation to 'indigenous Travellers' and the local connection requirements to access housing supports, to ensure that there is no discrimination when compared to the requirements on the wider community;
 - establishing and developing a response to the needs of Travellers who are nomadic within and through the county through the provision of transient halting site bays;
 - identifying and developing culturally specific responses to the needs of Travellers experiencing homelessness;
 - identifying and responding to the practical implications of the recognition of Traveller ethnicity, for the provision of Traveller-specific accommodation and of standard housing;
 - implementing the Public Sector Equality and Human Rights Duty in the next review of the TAP.
2. Establish and implement an ethnicity identifier in data gathering and analysis in relation to the provision of social housing and homelessness services and include all Traveller-specific accommodation options in housing applications (i.e. allow applicants identify themselves as a member of the Traveller community if they wish and for the sole purpose of identifying accommodation needs and include a list of needs/preferences any or all of which may be ticked, including, but not limited to permanent/transient halting site, group housing, outdoor space for dogs/horses and preference to be accommodated close to family members).
3. Develop a more transparent recording of the methodology of collection and data obtained in the annual count of members of the Traveller community (for example by survey, setting out the steps taken to ensure all members of the Traveller community were reached and including such questions as multiple accommodation preferences and difficulties in accessing such preferences or other accommodation in the past).

4. Consider the possibility of employing a Traveller Liaison Officer, in addition to the existing Tenant Liaison Officers, who should have a drop-in or phone clinic by which members of the Traveller community can voice any concerns they may have in respect of their accommodation directly. They could also assist with online applications where members of the Traveller community have no access to the internet. The officer should have regular meetings with members of the Council mandated with housing issues to ensure regular feedback on accommodation issues raised by members of the Traveller community.
5. Record data on both funds allocated and drawn down for Traveller-specific accommodation and those for general accommodation. This would help to inform the Council to ensure that there is no less favourable treatment of Travellers in the provision of accommodation. Account may be taken of the true preferences of members of the Traveller community whose accommodation needs are met through general housing funds and of the fact that some forms of accommodation are more expensive than others.
6. Assess over the coming years whether the new procedures set out in Circular 03/2020 of the DHPLG improve its rate of draw down for Traveller-specific accommodation. If no improvement is evident at that point, the Council should commission an independent report to determine the reasons for this and follow any recommendations made.

County Kildare Access Strategy-A Universal Access Approach 2020-2022

Universal Design is the design of buildings, products or environments to make them accessible to all people regardless of age, disability or other factors. According to the Census 2016, the total population with a disability residing in Kildare is 27,768 i.e. 12.5% of the population.

The Kildare Access Strategy includes six key areas of focus which include: - Public Awareness Education; Transportation and Public Realm; Community Culture and Heritage; Economic Development, Enterprise and Planning; Partnership and Collaboration and Housing and Services. The Strategy sets out a number of objectives and actions in relation to housing and services, as follows:

Objective 1: To ensure that our housing stock provides for Accessible Housing.

Action: Ensure and monitor that 10% of acquired housing stock meets the needs of those with a disability (dependent on market availability) and 12% of KCC new builds are suitable for those with a disability

Objective 2: To ensure that all housing stock meets the required standards.

Action: Build all KCC housing stock to Part M of the Building Regulations.

Objective 3: To ensure that the application process for housing assessment is as accessible as possible.

Action: Review our housing application process – create online applications where possible. KCC 2020

3. Housing Market Drivers

3.1 Introduction

This section addresses Section 1 of the HNDA analysis in line with the 'Guidance on the Preparation of a Housing Need and Demand Assessment' and relates to the identification of key housing market drivers, including household formation, population, housing affordability, including incomes, house prices, rent levels, access to finance and key drivers of the local and national economy.

Following the analysis of the housing market drivers, Section 3.5 comprises a table which summaries the key areas that may impact the results of the HNDA. The table is divided into three segments:

- demographic issues;
- affordability issues; and
- economic issues for the local housing market.

The table provides an evidence-based understanding of key demographic, affordability and economic factors and how these are influencing the local housing market.

3.2 Population Trends

3.2.1 Population

The 2016 Census recorded the population of County Kildare at 222,504 which is the fifth highest population of all local authorities in Ireland. Figure 1 shows population growth in County Kildare as recorded in Census 1991 to 2016.

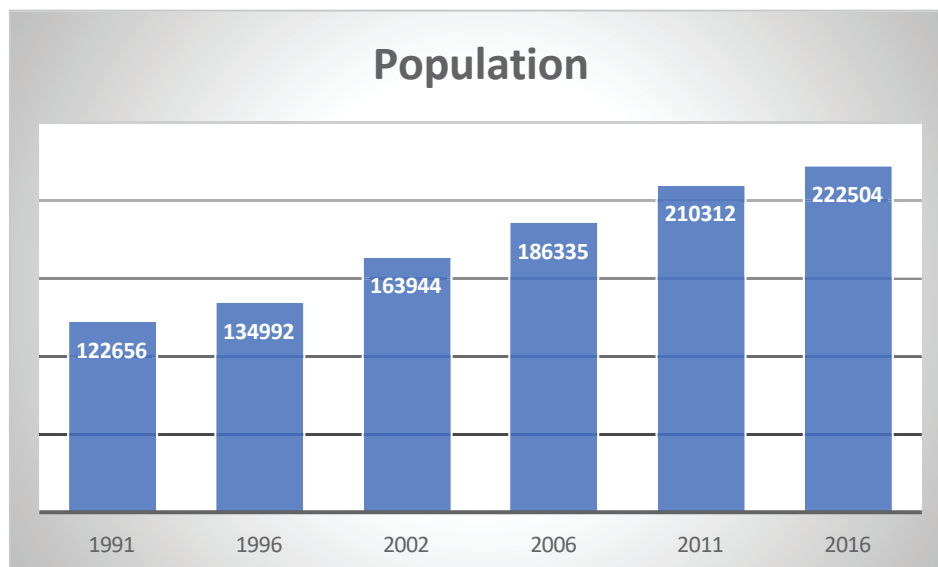


Figure 1 - Population of County Kildare 1991-2016 (Source: CSO)

Over a 20-year period (1996 to 2016), Kildare experienced a 64.8% (+87,512) increase in its population base - the second highest rate in the State, compared to the state average of 31.3%. The growth rate experienced between 2006 and 2016 which resulted in an overall increase of 19.4% was the fourth highest in the State. This is explained by a strong performance in natural increase (birth rate) and a strong performance in estimated net migration. In comparison, growth rates between 2011 and 2016

have been much slower for all areas across the country. During this period, Kildare increased its population by 5.8% - the third highest rate of all local authorities. As demonstrated in Figure 2, population growth in Kildare County has continuously outperformed the State average over the 25-year period 1991 to 2016.

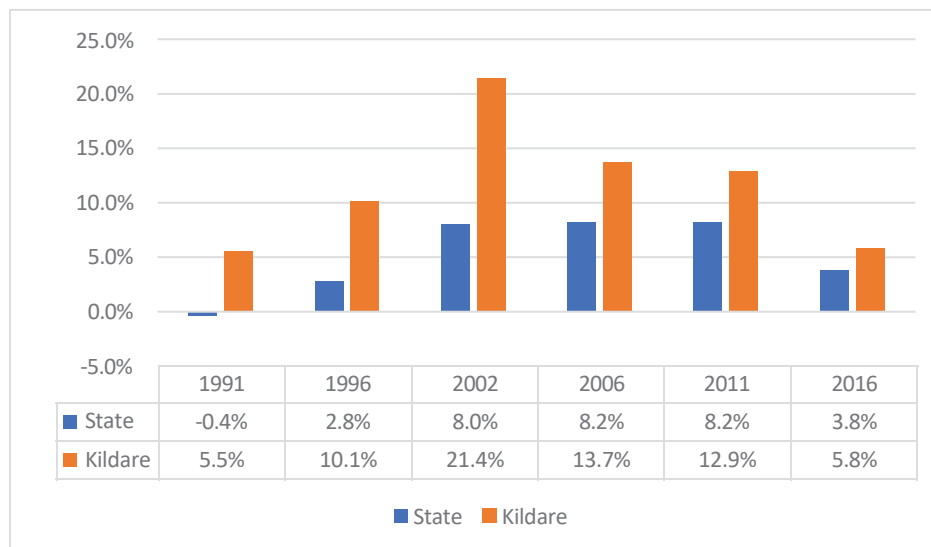
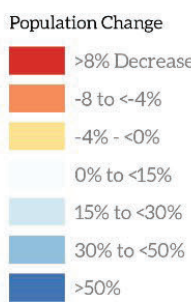
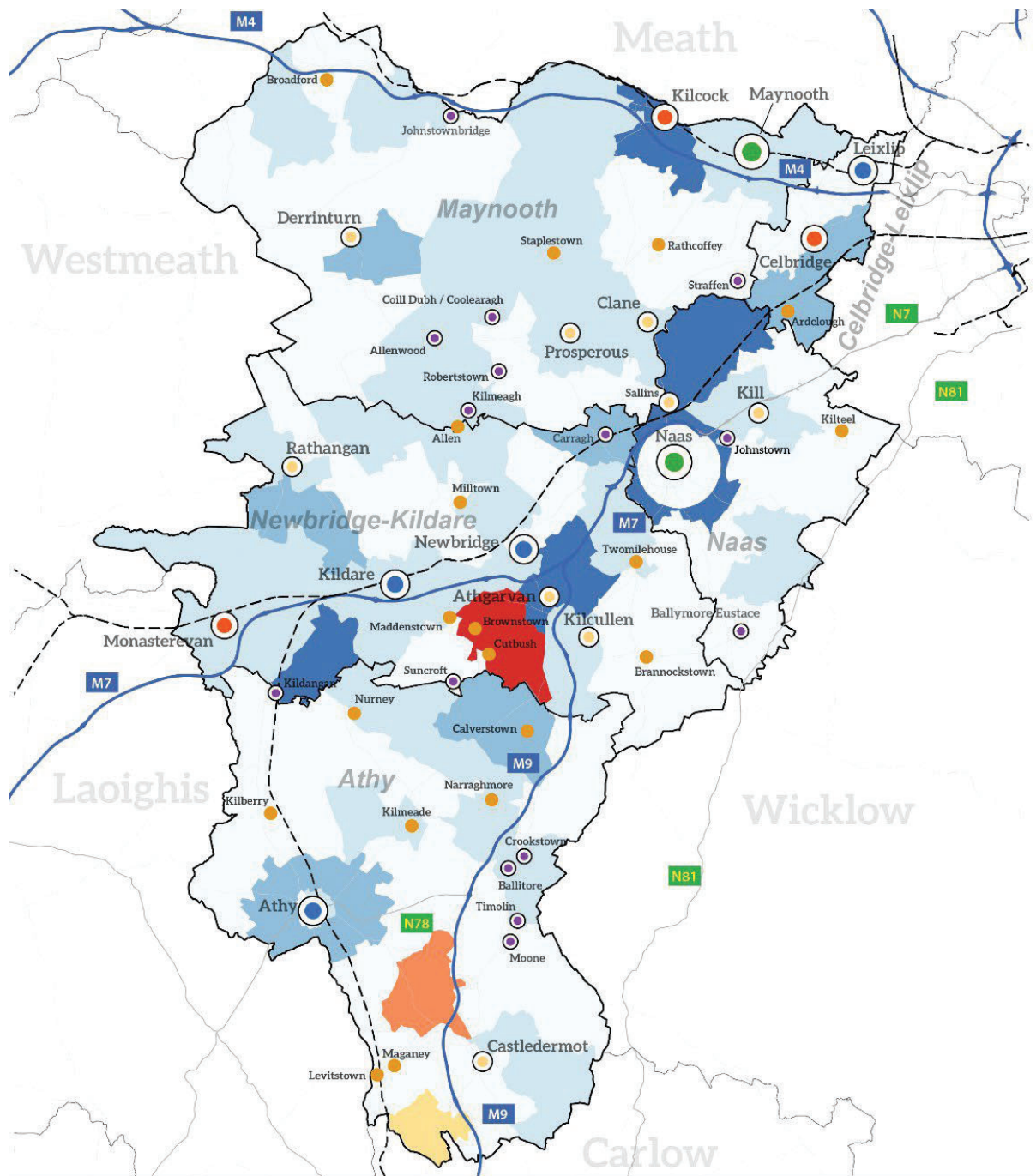


Figure 2 - Population as a percentage change from preceding census (Source: CSO)

At Electoral Division level, between 2006 and 2016, only 6 of the 89 EDs in Kildare witnessed population decline— most notable of these has been the decrease in Newbridge Urban by -2.6% (-206) - in sharp contrast to the high growth in the town’s environs. As represented on the map in Figure 3, highest increases have all been in the environs of urban areas and in general the central and north-east of the county, with the majority of this growth taking place between 2000 and 2011, influenced primarily by growth designations under the 1999 Strategic Planning Guidelines for the Greater Dublin Area, extensive residential zoning of land and Celtic tiger era construction levels. Increases in excess of 45% were recorded in the EDs of Newbridge Rural (+46.3%), Donaghcumper (+46.5%), Kilcock (+47.5%), Athy Rural (+53.1%), Naas Rural (+59.3%), Rathangan (+68.5%) and Newtown (+95%).



Population Change, 2006 to 2016



Kildare County Council
Cathair Chontae Chill Dara

AIRO
All Ireland Research Observatory
on Regional Development and Innovation

© Ordnance Survey Ireland/Government of Ireland
© OpenStreetMap Contributors
Data Source: CSO, GeoDirectory & AIRO
Produced by: All Ireland Research Observatory (AIRO)

0 2.5 5 10 Km

Figure 3 - Population Change 2006 to 2016 (Source: CSO & AIRO)

Population Density

With 131.3 persons per square kilometre, Kildare is the 8th most densely populated county in the State and is higher than the State (68.1) average but lower than the EMRA average of 160.9 persons per sq.km. As expected, there is a significant variation in density levels across the county with rates much higher in the Metropolitan (482.2) and Urban (2,294.8) parts of the county. Highest density levels are in the towns of Sallins, Celbridge, Kilcock, Leixlip and Kill. At the MD level, the Celbridge-Leixlip MD has by far the highest density levels at 702.9 persons per sq. km and is more than five times more densely populated than the county average. In contrast, Hinterland Kildare has a density of 102.3 whereas Rural Kildare is only 37.5 persons per sq.km.

Age Profile

Kildare has the highest rate of young people aged 0 to 24 years in the State. According to the 2016 Census, and referring to Table 1, the population aged 0 to 24 years residing in Kildare was 81,517 and represents 36.6% of the total population - the highest rate in the State.

	0-14	15-24	25-44	45-64	65+	15-64 Workforce
State	1,006,552	576,452	1,406,291	1,135,003	637,567	3,117,746
	21.1%	12.1%	29.5%	23.8%	13.4%	65.5%
Kildare	53,560	27,957	67,391	51,582	22,104	146,930
	24.1%	12.6%	30.3%	23.2%	9.9%	66.0%

Table 1 - Population, Census 2016, by Age and Percent, Kildare and the State

Over 28% of Kildare's population is aged '0-18' years - the 3rd highest rate of all local authorities in Ireland. Relative to other local authorities, Kildare has the 5th highest number of children aged Under 18 in the State and the 3rd highest rate with only Meath (29.3%) and Laois (28.6%) with a greater proportion of resident young people aged Under 18. At the Municipal District level there are some differences with Athy having the highest rate at 29.1%. Celbridge-Leixlip has the lowest rate at 26.9%.

Across the settlement hierarchy there are some locations with very high rates where more than a third of the resident population are aged Under 18: Carragh (41.9%), Kilmeague (35%), Johnstown (34.3%), Derrinturn (33.9%), Sallins (33.5%), Athgarvan (33.4%) and Kilcock (33.3%). Kildare's child and youth dependent cohort is the 6th highest in the State, meaning those of working age have a relatively greater burden in supporting this young population.

Relative to other local authorities, Kildare has the 5th highest number of young people aged 0-24 (81,517) and has the joint highest rate in the State with Meath also having a rate of 36.6%. Since 2011, the total number of young people aged 0 to 24 in Kildare has increased from a total 77,832 (+4.7%) with a rate of 37% - still the highest rate in the State.

At the Municipal District level there is a different profile when compared with other young age cohorts. The existence of Maynooth University results in the Clane-Maynooth MD having the highest rate at 39.1%. All other MDs are approximately 35-36%. Again, a number of settlements have particularly high rates such as Carragh (49.2%), Kilmeague (42.8%), Johnstown (42.5%), Maynooth (42%) and Athgarvan (40.8%).

The average age of the State population in 2016 was 37.4, up from 36.1 in 2011, a rise of 1.3 years. In Kildare, the average age is 34.9, a rise of 1.4 years.

The graph in Figure 4 shows the proportion of the population in Kildare County aged over 45 years

increasing from 20% in 2006 to 23% in 2016, and those aged over 65 years increasing from 7% in 2006 to 10% in 2016. In real terms, the number of people over the age of 65 in County Kildare in 2006 was 12,779, increasing to 22,104 persons in 2016, which equates to an increase of 73%.

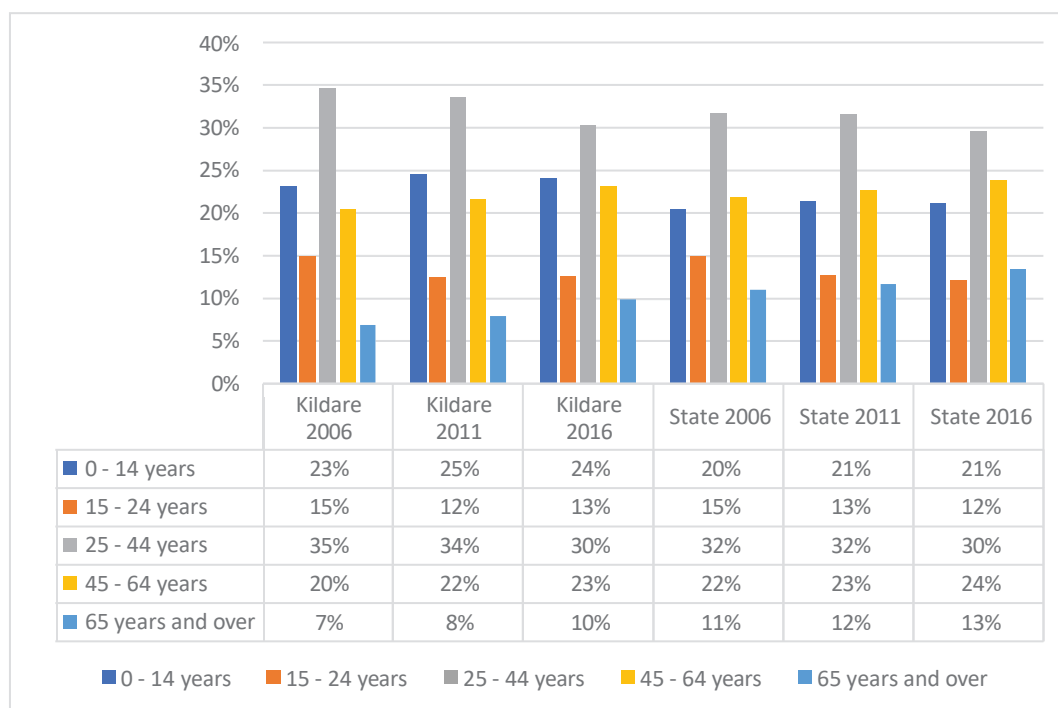


Figure 4 - Age Cohorts State and Kildare County, 2006- 2016 (Source: CSO)

The Economic and Social Research Institute (ESRI), in a report in 2017⁵, projected that the national population aged 65 will rise from 13% in 2016 to 18% by 2030. Over the same time period, the proportion of the population in the 15 to 64 age group will remain stable and the percentage of the population in the 0 to 14 age group will decrease from 21 to 18%. These figures translate into a young age dependency ratio (i.e. the size of the 0-14 to the 15-64 population) of 32% in 2016 falling to 29% by 2030. Over the same period there will be a rise in the old-age dependency ratio (i.e. the size of the 65+ to the 15-64 population) from 20% to 29%.

For County Kildare, and referring to Table 2 below, population projections at county level provided in the HNDA Data Source, which are based on the NPF 50:50 City Scenario, show a similar trend, however the decrease in the percentage of the population in the 0 to 14 age group and increase in the percentage of the population in the 65+ age group is far greater than the same rate at national level. This has ramifications for housing choice for an older population in County Kildare moving beyond this decade.

	2016		2031		2040	
0-14	53,560	24.1%	45,580	17.4%	40,570	14.50%
15-24	27,957	12.6%	38,513	14.7%	32,215	11.52%
25-44	67,391	30.3%	65,598	25.0%	77,098	27.56%
45-64	51,582	23.2%	70,344	26.8%	64,626	23.10%
65+	22,104	9.9%	42,588	16.2%	58,870	21.05%

Table 2 - Population, Kildare 2016 and projected population 2031 and 2040 (Source: CSO, ESRI)

⁵ ESRI Report 2017 - Projections of Demand for Healthcare in Ireland, 2015-2030, First Report from the Hippocrates Model https://www.esri.ie/system/files/publications/RS67_Print%20%26%20Online.pdf

Table 3 compares the proportion of the County Kildare population in the 65-74 age cohort at Census 2016 against the same age cohort in 2031. The analysis was carried out by moving the current 50-59 age cohort forward 15 years. The table shows that the total population in this cohort at 2031 is 25,527, higher than the HNDA Data Source projected figure of 23,329, which would take account of various factors including mortality rates. However, the table provides a good indicator of the variation across the MDs, with Naas, Clane-Maynooth and Celbridge-Leixlip MDs showing higher rates of people entering the 65+ age group. The table indicates a growing demand for elderly appropriate accommodation across all MDs.

	Aged 65 - 74 (2016)	Aged 65-74 (2031)	% change
Athy MD	2,281	3,661	60%
Kildare-Newbridge MD	3,419	5,884	72%
Naas MD	3,168	5,982	89%
Clane-Maynooth MD	2,836	5,364	89%
Celbridge-Leixlip MD	2,498	4,636	86%
Total	14,202	25,527	80%

Table 3 Population Aged 65-74 County Kildare Census 2016 and projected population 2031
(Source: CSO, ESRI)

Table 2 above shows that in 2016, the 0-24 age cohort represented 36.7% of the population in County Kildare. Projections indicate that this age cohort will decline to 32.1% by 2031 and further to 26.1% by 2040. However, examining how the people within the 0-24 year old cohort in 2016 will move through the cohorts by 2031 gives an understanding of household demand. It is assumed that most new households are formed between the ages of 25 and 34. Table 4 below compares the population of County Kildare within this cohort at 2016 Census and then as projected by ESRI 50:50 City Scenario for 2031 and 2040. The table indicates an increasing proportion of the population within this cohort, suggesting further pressure on demand for new 'starter homes', again potentially 1 or 2 bed units.

	2016	2031	2040
County Kildare, Aged 25-34	29,276	36,099	40,283

Table 4 Population Aged 25-34 for County Kildare, Census 2016 and projected population 2031
(Source: CSO, ESRI)

Household Size

According to the CSO a 'private household' comprises either one person living alone or a group of people (not necessarily related) living at the same address with common housekeeping arrangements - that is, sharing at least one meal a day or sharing a living room or sitting room.

Table 5 indicates Census data from 2011 and 2016 relating to the number of private households, the numbers of persons in private households and the average number of persons per household in Kildare (including by Municipal Districts), regional and national level.

	2011			2016		
	No. of households	No. of persons	Average persons per household	No. of households	No. of persons	Average persons per household
STATE	1,649,408	4,500,569	2.73	1,702,289	4,676,648	2.75
EMRA	794,688	2,168,270	2.74	815,557	2282857	2.80
KILDARE	70,504	208,004	2.95	73,596	220,923	3.00

Table 5 Average Household Size, State, EMRA and Kildare, 2011 and 2016 (Source: CSO)

Census 2016 indicates that the average number of persons per household, nationally, recorded an increase for the first time since 1966. In 2011 there were on average 2.73 persons per households nationally. The equivalent figure stood at 2.75 in 2016. Kildare, which is above the national average, has seen an increase from 2.95 in 2011 to 3.0 in 2016. The increase may reflect the difficulties people have faced in forming new households as a result of the last economic crisis given the decline in both income levels and construction activity entering a period of significant decline. Figure 5 compares average number of persons per household at a national, regional, county and MD level, showing, for County Kildare, the highest rate in the Clane-Maynooth MD and lowest rate in the Athy MD.

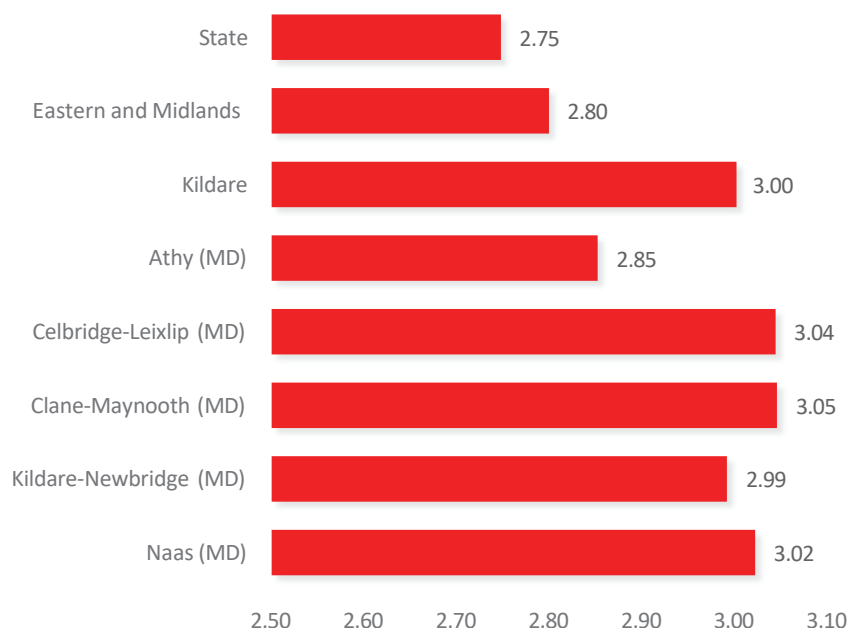


Figure 5 - Average Household Size (State, EMRA, Kildare & Municipal District) in 2016 (Source: CSO)

As illustrated in Table 6 below, the pattern of household formation in Kildare is characterised by 2 person households, followed by 4 person households. The four person households have increased from 20.02% of total households to 21.5%, a 1.48% increase, which was double the rate change of +0.73% at national level.

Size of Household (Hshld)	State 2011		State 2016		Kildare 2011		Kildare 2016	
	Hshlds	% of total hshlds	Hshlds	% of total hshlds	Hshlds	% of total hshlds	Hshlds	% of total hshlds
1 person	392000	23.70%	399815	23.49%	12586	17.79%	12854	17.47%
2 person	479271	28.97%	486536	28.58%	19460	27.50%	19244	26.15%
3 person	296010	17.89%	297565	17.48%	13654	19.30%	13840	18.81%
4 person	268136	16.21%	288328	16.94%	14167	20.02%	15569	21.15%
5 person	145102	8.77%	154841	9.10%	7439	10.51%	8298	11.28%
6 person	52775	3.19%	54016	3.17%	2516	3.56%	2770	3.76%
7 person	14174	0.86%	14282	0.84%	628	0.89%	690	0.94%
8 person	4375	0.26%	4459	0.26%	201	0.28%	214	0.29%
9 or more person	2365	0.14%	2447	0.14%	112	0.16%	117	0.16%

Table 6 Average Household Size, State and Kildare, 2011 and 2016 (Source: CSO)

Household Composition

Referring to Table 7, in 2016, married couples with children, at 38%, represented the largest cohort of household type in Kildare, higher than the State average of 31%. Kildare had a slightly lesser number of one-person households at 17% when compared to the State average of 23% which was probably related to the tendency towards a younger population in Kildare, noting that in 2016, 9.9% of the population in Kildare was over the age of 65, compared to 13.4% nationally.

	One person	Cohabiting couple	Cohabiting couple with children	Married couple	Married couple with children	One parent with children
State	399815 (23%)	68396 (4%)	68979 (4%)	254744 (15%)	529687 (31%)	177920 (10%)
Kildare	12854 (17%)	2971 (4%)	3575 (5%)	10533 (14%)	27927 (38%)	7236 (10%)

Table 7 Private Households by type, 2016 (Source: CSO)

Headship Rates

The headship rate provides one measure of the rate of household formation. The headship rate is the proportion of individuals in an age cohort that list themselves as “head of household” or “principal reference person” in the Census or in the Quarterly National Household Survey (QNHS). Each household provides one reference person, thus an increase in the headship rate reveals an increase in the number of households.

During the Celtic Tiger years and up to the economic recession of 2008 onwards, headship rates had been steadily increasing in Ireland at a national level, with the biggest increases seen for the younger age groups. In particular, between 1996 and 2002 there were large increases in headship rates for those aged 20-29, between 2002 and 2006 the biggest increases were recorded for those aged 25 to 34, while between 2006 and 2011 the biggest increases were for those aged 30 to 44. As shown in Table 8, in the aftermath of the recession, overall headship rates fell between 2011 and 2016, with almost all age groups showing a decline over the period with the largest falls recorded for the younger age groups. This can be seen in Table 8, with Kildare generally following the national trend.

	2011		2016	
	State	Kildare	State	Kildare
Under 25 years	0.04	0.03	0.02	0.02
25 - 29 years	0.35	0.36	0.30	0.27
30 - 34 years	0.47	0.47	0.43	0.43
35 - 39 years	0.51	0.51	0.49	0.50
40 - 44 years	0.53	0.53	0.53	0.52
45 - 49 years	0.54	0.54	0.54	0.54
50 - 54 years	0.56	0.56	0.56	0.56
55 - 59 years	0.57	0.57	0.57	0.57
60 - 64 years	0.58	0.56	0.58	0.58
Over 65 years	0.63	0.61	0.62	0.60

Table 8 Headship Rates, 2011 and 2016 (Source: CSO)

Net Migration

The major and consistent expansion of County Kildare's population in recent years is mainly attributable to a high birth rate and high levels of inward migration into the county. Table 9 shows the consistent high levels of inward migration as recorded in the 2006, 2011 and 2016 Census.

	2006	2011	2016
Dublin to Kildare	2301	2294	2974
Dublin to Laois	695	448	513
Dublin to Louth	450	539	883
Dublin to Meath	3534	2073	2602
Dublin to Wexford	788	644	878
Dublin to Wicklow	1718	1594	2201

Table 9 Migration into Kildare from Dublin as per Census 2006, 2011 and 2016 (Source: CSO)

Table 10 shows inward migration to Kildare from other counties, recorded in 2006, 2011 and 2016 Census. The data shows the stark contrast between the levels of migration from Dublin to Kildare and from all other counties, demonstrating the continued influence that Dublin's property market has had on County Kildare.

	2006	2011	2016
Carlow to Kildare	194	146	125
Kilkenny to Kildare	82	66	79
Laois to Kildare	197	238	183
Longford to Kildare	34	22	44
Louth to Kildare	53	59	71
Meath to Kildare	296	282	306
Offaly to Kildare	127	91	107
Westmeath to Kildare	144	96	129
Wexford to Kildare	76	79	103
Wicklow to Kildare	273	256	260
Clare to Kildare	52	43	37
Cork to Kildare	176	129	152
Kerry to Kildare	90	31	44
Limerick to Kildare	138	101	77
Tipperary to Kildare	76	59	77
Waterford to Kildare	76	36	60
Galway to Kildare	188	113	118
Leitrim to Kildare	19	9	17
Mayo to Kildare	86	43	68
Roscommon to Kildare	33	38	32
Sligo to Kildare	48	30	62
Cavan to Kildare	29	50	27
Donegal to Kildare	68	60	50
Monaghan to Kildare	32	23	29

Table 10 Migration into Kildare from other counties as per Census 2006, 2011 and 2016 (Source: CSO)

3.2.2 Household Demand and Population Projections

3.2.2.1 Household Supply Target

As part of the development plan process, local authorities must demonstrate how their development plan is consistent with the NPF and the NPF Implementation Roadmap population projections for their area. In December 2020, the DHLGH issued the 'Housing Supply Target Methodology for Development Planning' Section 28 Guidelines to translate these more consistently into development plans. These Guidelines build on research undertaken by the ESRI into regional demographics and structural housing demand at county level, taking the ESRI's 50:50 City Scenario household projections as the recommended housing demand scenario to be used by local authorities. The Guidelines set a methodology for the application of population and housing projections into local authority plan processes. This sets a means of calculating the total housing demand and Housing Supply Target for

the exact 6-year period of the development plan, to the nearest quarter. Refer to Chapter 2 and Appendix 9 of the County Development Plan for further details on the methodology used for calculating the Housing Supply Target for County Kildare for the development plan period.

However, the HNDA Toolkit's Convergence Scenario produces a significantly different estimate of housing demand for this period, as it is based on a longer-term approach to calculating housing demand. The Housing Supply Target methodology focuses on need in a strict 6-year period, aligning to the lifetime of a single development plan. The HNDA Toolkit includes forecasts over the whole period 2020-2040 to align with the long-term approach of the NPF, with a particular focus on the period to 2031 which is identified as a key milestone in the NPF. As a result, the Convergence Scenario for each local authority is based on:

- Total ESRI 50:50 City scenario projected new household demand 2017 to 2031 (57,960 for Dublin City),
- Minus actual new housing supply for 2017-19 only (4,104 for County Kildare).

This gives a total housing demand for County Kildare of 18,134 between 2020 and 2031. The resulting proportional uplift to the 50:50 City Scenario is applied for the 50:50 City forecasts each year, resulting in 9,038 households for County Kildare for the plan period. It does not include unmet demand (this is included separately in the Toolkit, spread by default over 10 years instead of 6), and it does not carry forward some of the shortfall between forecast demand and actual supply for 2020 onwards as with the Housing Supply Target.

As a result, the Convergence Scenario as used in the HNDA Toolkit gives a total new household demand (not including existing unmet need) of 9,038 households for the plan period – significantly lower than the Housing Supply Target of 12,923. This is because DHLGH's HNDA Toolkit is intended to give broad, long-run estimates of housing need from 2020 to 2040, rather than condensing housing need, housing shortfalls and unmet demand into a tight six-year period as required by DHLGH's Housing Supply Target methodology. Therefore, the Convergence Scenario should be considered as a broad demographic estimate rather than a planning target.

Unmet Housing Need

The Toolkit includes built-in data on existing unmet housing need. This is a combination of two datasets: an estimate of overcrowded households by local authority (based on a special tabulation of Census 2016 data) and data on homelessness households (based on maximum numbers of households interacting with homelessness services in the last week December 2019, comprising 155 households for County Kildare). Local Authorities may substitute their own estimate of unmet need with sufficient justification. The model can be modified to apportion existing need across all tenures or to assign all existing need to social rent. It can also be modified to set an assumption on how many years it will take to clear existing need (the default setting being 10 years). In compiling this section for the HNDA, Kildare County Council has made use of the default estimate of overcrowded households (178 households in 2016). However, an updated estimate of homeless households within the Council's administrative area as of October 2021 has been provided (168 households) in consultation with Kildare County Council's housing section, the Housing Authority.

Future Households

The HNDA Tool incorporates household projections produced at county and local authority level by the ESRI (alongside the population projections described above) in December 2020. There are five scenarios inbuilt into the tool which form a basis for the calculation of housing need across all tenures:

- Convergence: based on ESRI 50:50 City Scenario and incorporating unmet demand in years 2017-2019 inclusive over the period 2020-2031.
- Baseline
- 50:50 city
- High migration
- Low migration

The additional, newly-formed households forecast under these scenarios form the structural housing demand for County Kildare over the HNDA review period are shown in Table 11 below. The figures presented in this table do not include the existing unmet need of 346 subsequently inputted into the HNDA Tool.

Year	Convergence	Baseline	50:50 City	High Migration	Low Migration
2020	1,521	1,479	1,480	1,478	1,214
2021	1,532	1,494	1,490	1,525	1,240
2022	1,553	1,520	1,511	1,586	1,280
2023	1,546	1,518	1,504	1,621	1,347
2024	1,495	1,474	1,454	1,617	1,379
2025	1,457	1,443	1,418	1,628	1,380
2026	1,473	1,464	1,433	1,661	1,402
2027	1,508	1,503	1,467	1,712	1,444
2028	1,559	1,559	1,516	1,779	1,501
2029	1,515	1,523	1,474	1,754	1,468
2030	1,481	1,496	1,441	1,738	1,445
2031	1,495	1,517	1,455	1,769	1,469

Table 11 - Forecasted Additional Households Per Annum

Table 12 shows the total housing supply target under the convergence method together with the unmet existing housing need distributed over the 10 years 2022 to 2031.

Year	Convergence	Unmet Existing Housing Need	Total Housing Supply Target
2020	1,521		1,521
2021	1,532		1,532
2022	1,553	35	1,588
2023	1,546	35	1,581
2024	1,495	35	1,530
2025	1,457	35	1,492
2026	1,473	35	1,508
2027	1,508	35	1,543
2028	1,559	34	1,593

Year	Convergence	Unmet Existing Housing Need	Total Housing Supply Target
2029	1,515	34	1,549
2030	1,481	34	1,515
2031	1,495	34	1,529

Table 12 - Forecasted Additional Households Per Annum, including existing unmet need

3.2.2.2 Population Projections

Section 28 Planning Guidelines (Housing Supply Target Methodology for Development Planning) released in December 2020 note that the ‘established NPF Roadmap population projections for each county continue to be the population parameters for local authority development planning processes. City or County development plans must therefore plan for the identified population growth within these estimates and use them as the basis for strategic decision-making in their development plan process, including its core strategy, settlement strategy and housing policies’. In the case of County Kildare, the roadmap provides a population projection of 249,000 – 254,000 for 2026, and 259,000 – 266,500 for 2031.

Mid-East	2016	2026	2031
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

Table 13 Transitional Regional and County Population Projections to 2031
(Source: Implementation Roadmap for the National Planning Framework, 2018)

As demonstrated in Figure 6, population growth in Kildare County has continuously exceeded the State average over the 25-year period 1991 to 2016.

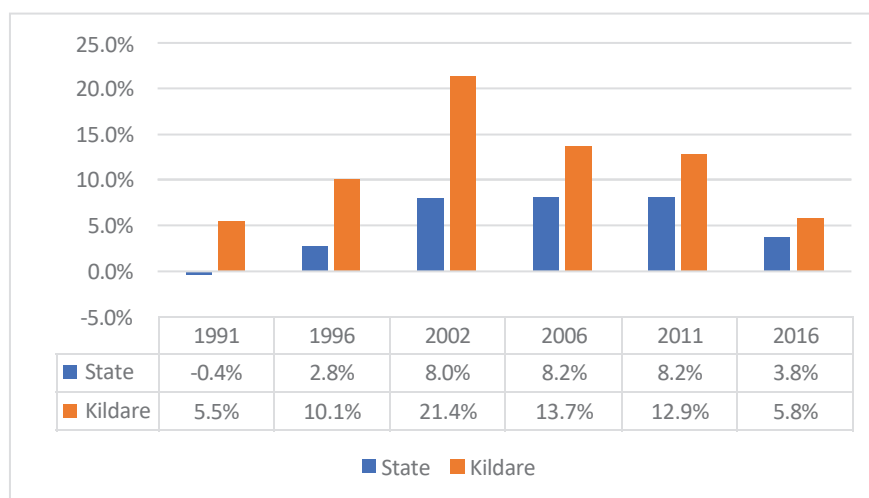


Figure 6 - Population as a percentage change from preceding census (Source: CSO)

The graph in Figure 7 shows expected population growth in County Kildare to 2031, equating to 117% growth over the 1991 Census figure.

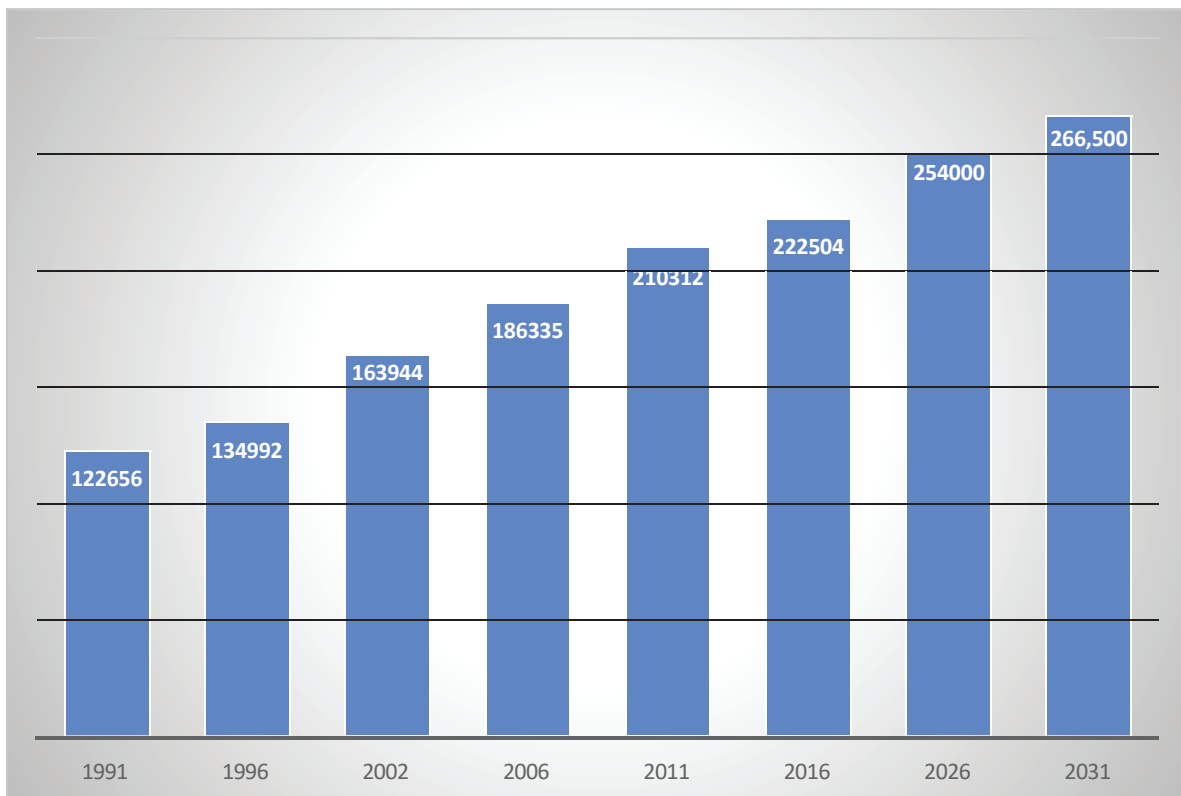


Figure 7 - Population growth for County Kildare 1991 – 2016 and projected growth 2026 and 2031
 (Source: CSO and Implementation Roadmap for the National Planning Framework, 2018)

Section 28 guidelines (Housing Supply Target Methodology for Development Planning - Guidelines for Planning Authorities (2020)) state that the ‘*established NPF Roadmap population projections for each county continue to be the population parameters for local authority development planning processes. City or County development plans must therefore plan for the identified population growth within these estimates and use them as the basis for strategic decision-making in their development plan process, including its core strategy, settlement strategy and housing policies*’

Therefore, the identified population growth targets for County Kildare outlined in the NPF Implementation Roadmap have been utilised in this Housing Strategy and HNDA. Utilising population growth scenarios that align with NPF targets, the future population of County Kildare was estimated annually out to 2026 and 2031. The NPF population projections were availed of to develop an interpolation of the required increase per annum for County Kildare from the baseline year 2016 (Census) to NPF target years 2026 and 2031. This allowed for the determination of annual population projections for the development plan period. The projected population growth in County Kildare throughout the plan period and beyond is outlined in Table 14 below. The high end of the NPF population projections have been utilised for 2026 and 2031.

Year	Population Total	Source	Annual Population Increase	Percentage Increase	Total Population Increase 2021 - 2031
2006	186,335	Census		-	
2007	189,330		2,995	1.61%	
2008	192,325		2,995	1.58%	
2009	195,320		2,995	1.56%	
2010	198,316		2,996	1.53%	
2011	201,312	Census	2,996	1.51%	
2012	205,550		4,238	2.11%	
2013	209,788		4,238	2.06%	
2014	214,026		4,238	2.02%	
2015	218,265		4,239	1.98%	
2016	222,504	Census	4,239	1.94%	
2017	225,654		3,150	1.42%	
2018	228,804		3,150	1.40%	
2019	231,954		3,150	1.38%	
2020	235,104		3,150	1.36%	
2021	238,254		3,150	1.34%	
2022	241,404		3,150	1.32%	
2023	244,553		3,149	1.30%	
2024	247,702		3,149	1.29%	
2025	250,851		3,149	1.27%	
2026	254,000	NPF High Projected	3,149	1.26%	
2027	256,500		2,500	0.98%	
2028	259,000		2,500	0.97%	
2029	261,500		2,500	0.97%	
2030	264,000		2,500	0.96%	
2031	266,500	NPF High Projected	2,500	0.95%	31,396

Table 14 - Projected population growth in County Kildare

3.2.2.1 Determination of Average Household Size and Total Additional Households

Census 2016 results indicate that County Kildare had an average household size of 3.0, compared to a state average of 2.75. However, the NPF states that this is expected to decline, nationally, 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.

Applying the annual household supply target from Table 12 and interpolated population projections from Table 14, allows a projection on average household size and total household figures for County Kildare to 2031. This is presented in Table 15. The table indicates that, by 2031, the average household size in County Kildare is projected to be 2.77 and the number of households in County Kildare is expected to increase to 96,180.

Year	Population Total	Number of Total Households	Average Household Size	Number of Anticipated Houses per Annum	Total Anticipated Houses between 2023 - 2031
2016	222,504	73,596	3.0	638	
2017	225,654	74,581	3.03	985	
2018	228,804	75,799	3.02	1218	
2019	231,954	77,700	2.99	1901	
2020	235,104	79,221	2.97	1,521	
2021	238,254	80,752	2.95	1,532	
2022	241,404	82,340	2.93	1,588	
2023	244,553	83,921	2.91	1,581	
2024	247,702	85,451	2.90	1,530	
2025	250,851	86,943	2.89	1,492	
2026	254,000	88,451	2.87	1,508	
2027	256,500	89,994	2.85	1,543	
2028	259,000	91,587	2.83	1,593	
2029	261,500	93,136	2.81	1,549	
2030	264,000	94,651	2.79	1,515	
2031	266,500	96,180	2.77	1,529	13,840

Table 15 - Projected total households and average household size over HNDA period to 2031

3.3 Housing Market Overview

The residential property market in Kildare and in Ireland has proven to be volatile in recent decades, with marked cycles of rapid expansion and decline. Since 2010, the property market has been hit by significant undersupply nationally, and prices have risen as a result. The Central Statistics Office (CSO) figures (June 2021) show the State's property market continues to be fuelled by Covid-19 related factors, such as increased savings and lower-than-anticipated supply.

3.3.1 Residential Property Sales

Analysis of the Residential Property Price Register (PPR) was conducted to evaluate volume of sales and price history of the county over time.

Volume of Transactions

The property price transaction data in County Kildare for 2020 has been analysed as part of the exercise to project house price bands. 2020 has been chosen to reflect the current market context and to understand latest house pricing and distribution of residential units per price band. The analysis carried out (based on the Property Price Register) reveals there were 2,313 transactions in County Kildare in 2020 across the eight price bands. For the purpose of this exercise, any properties that were sold for below market price have been omitted as they do not give a true representation of market prices. The following analysis of house price trends and historic transactional housing market data allows for a calculation of projected house price bands and projected annual price increase or decrease based on the percentage split of the eight price bands.

Price Bands / Value Distribution (2020)	Number of Transactions	% Total
0 - 100,000	61	3%
100,001 - 150,000	116	5%
150,001 - 200,000	231	10%
200,001 - 250,000	340	15%
250,001 - 300,000	488	21%
300,001 - 350,000	376	16%
350,001 - 400,000	323	14%
400,001 +	378	16%
Total	2313	

Table 16 - Property Price Transaction Data for 2020 in County Kildare (Source: CSO/RPPR)

It is noted that c.52% of the property transactions in 2020 were in the range of €200,000 to €350,000 price range, with c.30% of properties selling for more than €350,000. Having considered the most recent house price activity in the County (i.e. 2020), it is important to review historical trends in property price fluctuation to provide greater insight into potential house price change over the development plan period.

Transaction Type

Table 17 shows that first time buyers (owner-occupier) continue to represent a large proportion of residential property transactions in County Kildare.

	Kildare			State		
	All Buyer Types	First Time Buyer	First Time Buyer as % of Total	All Buyer Types	First Time Buyer	First Time Buyer as % of Total
2010	938	564	60%	17933	9691	54%
2011	667	266	40%	15026	5223	35%
2012	952	380	40%	20754	6995	34%
2013	1148	381	33%	24578	7271	30%
2014	1640	546	33%	35257	9422	27%
2015	1955	607	31%	39385	10030	25%
2016	1904	542	28%	39774	10492	26%
2017	2262	698	31%	43184	12278	28%
2018	2380	886	37%	44397	13491	30%
2019	2553	1018	40%	45273	14511	32%
2020	2234	979	44%	37883	12599	33%
*2021	1188	508	43%	22105	6902	31%

*Up to end July 2021

Table 17 - Transaction type, County Kildare (Source: CSO/RPPR)

Property Type

Table 18 shows that compared to the state average, new build dwellings represent a relatively high proportion of sales in County Kildare. Between 2016 and 2020, 35% of dwelling sales were new builds, compared to the State average of 20%. This might indicate a close correlation between the volume of first-time buyers, volume of new build transactions and the exceptionally high take up of the Help-to-Buy Scheme in County Kildare since its introduction in 2017. Data published by the revenue in September 2021 shows that, to date, there have been 3,185 HTB claims⁶ in County Kildare, which equates to 11% of total HTB claims across the country. County Kildare has the 3rd highest number of HTB claims, behind Cork with 3,603 claims and Meath with 3,553 claims. Collectively, the four Dublin local authorities have had 7,387 claims.

	Kildare		State	
	New Build	% of total transactions	New Build	% of total transactions
2010	383	40%	5146	28%
2011	170	23%	2751	17%
2012	157	16%	3085	14%

⁶ Help To Buy (HTB) Incentive Statistics – Revenue publication, 30th September 2021

2013	286	23%	3473	13%
2014	324	19%	5388	13%
2015	471	22%	6351	14%
2016	539	24%	7132	15%
2017	776	29%	9402	18%
2018	1003	35%	11341	21%
2019	1489	43%	13123	22%
2020	1185	43%	11863	24%

Table 18 - Property type, County Kildare (Source: CSO/RPPR)

Mean Property Prices

Table 19 illustrates transactions and average prices for Kildare County and the State over the period 2010 to 2020, as recorded in the CSO Residential Property Price Index. This data indicates a particularly strong increase in the quantum of transactions in Kildare from 2013 to 2014 compared to the state average, and a steady increase thereafter with particularly high figures evident during 2017-2019. While transaction volumes are lower in 2020, the prices have consistently grown since 2012 reaching highs of €323,994 in 2020, noting that the mean price in Kildare increased by 3% in the year to end 2020, compared to the State average of 0.79%.

	Kildare			State		
	Volume of Transactions	Mean Price	Year-on-Year % mean price change	Volume of Transactions	Mean Price	Year-on-Year % mean price change
2010	938	256277		17933	256488	
2011	667	229403	-11.71%	15026	226489	-13.25%
2012	952	195393	-17.41%	20754	203576	-11.26%
2013	1148	204000	4.40%	24578	206628	1.50%
2014	1640	236947	16.15%	35257	215594	4.34%
2015	1955	250642	5.78%	39385	226802	5.20%
2016	1904	266767	6.43%	39774	249610	10.06%
2017	2262	283107	6.13%	43184	273810	9.70%
2018	2380	304224	7.46%	44397	291418	6.43%
2019	2553	314516	3.38%	45273	296172	1.63%
2020	2234	323944	3.00%	37872	298517	0.79%
2021*	1279	334769	10.5%**	29415	312088	4.09%**

*Up to end July 2021

** 12 months to end July 2021

Table 19 - Residential Property Price Transactions and Mean Price in Kildare and State 2010-2020 (Source: CSO)

Figure 8 illustrates the mean sale price for properties in Kildare and the State between the period 2010 and 2020.

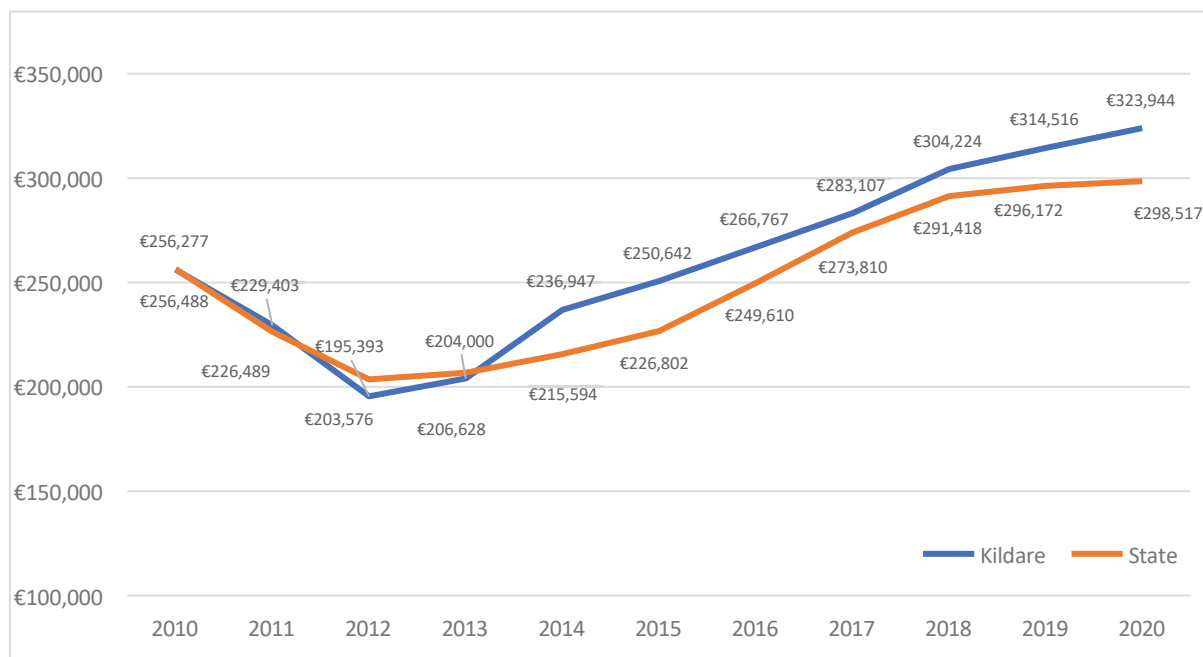


Figure 8 - Mean House Price Kildare/State 2010-2020 (Source: CSO)

According to the “Residential Property Price Index – July 2021” published by the CSO, residential property prices increased by 8.6% nationally in the year to July 2021. This compares to an increase of 6.9% in the year to June and a decrease of 0.7% in the twelve months to July 2020. In Dublin, residential property prices saw an increase of 8.1% in the year to July, while property prices outside Dublin were 9.1% higher. For Kildare, analysis shows that residential property prices increased by 10.5% in the year to July 2021.

Price Variability

Analysis of PPR transactions for Kildare County was undertaken to analyse the distribution of residential property prices at a Municipal District level. The mean transaction price per annum 2016-2021 is detailed per MD in Table 20. The table shows an obvious disparity between MDs, with average prices in Celbridge-Leixlip MD significantly higher than those in the Athy MD.

	Athy MD	Kildare-Newbridge MD	Naas MD	Clane-Maynooth MD	Celbridge-Leixlip MD
2016	160646	207827	310041	285368	334842
2017	171763	234921	311071	299603	322690
2018	177060	248675	323628	331442	341913
2019	211074	261938	310883	369552	345685
2020	206623	274073	350229	334112	349342
2021*	224590	326615	364091	365521	371872

*Up to end Q2 2021

Table 20 - Mean Price at MD level for Kildare, 2010-2021 (Source: CSO / AIRO)

Median Property Prices

Table 21 shows that the median⁷ property prices in Kildare have been following the same trend as that of the state average, with fluctuations experienced in the rate of increase. The rate of increase of 6.13% in 2020 contrasts with the much lower state average of 2.73%, indicating a rapid median price rise in 12 months.

	Kildare		State	
	Median Price	Year-on-Year % change	Median Price	Year-on-Year % change
2010	239998		220000	
2011	205000	-17.07%	182500	-20.55%
2012	175000	-17.14%	160000	-14.06%
2013	177488	1.42%	150000	-6.25%
2014	210000	18.32%	157500	5.00%
2015	230000	9.52%	170000	7.94%
2016	247500	7.61%	190000	11.76%
2017	260000	5.05%	220000	15.79%
2018	281781	8.38%	240000	9.09%
2019	296803	5.33%	253100	5.46%
2020	315000	6.13%	260000	2.73%
2021*	317500	10.2%**	260000	0%**

*Up to end July 2021

** 12 months to end July 2021

Table 21 - Residential Property Median Price for Kildare and State 2010-2021 (Source: RPPR)

3.3.2 Private Rental Market

The Rent Index is produced by the Residential Tenancies Board (RTB) and the Economic and Social Research Institute (ESRI). It provides rental indicators (such as the Rent Index) generated to track price developments in the Irish market. Rents grew nationally by 8% in the year to Q2 2021 in comparison to 1.8% in the year to Q2 2020. The national standardised average rent stood at €1,352 in Q2 2021, up from €1,226 at Q2 2020. Kildare, along with Cork, Dublin, Galway, Limerick, Louth, Meath and Wicklow, have standardised average rents above €1,000 per month.

The average prices (for all property types) were related to each corresponding MD by geocode, with this data presented in Table 22. In addition, Table 23 shows annualised rents for the main settlements in Kildare. The data shows that in County Kildare rents grew by 6.5% in the 12 months to end of Q2 2020 and 8.2% in the 12 months to end of Q2 2021, the latter being in line with national average increase of 8%.

⁷ Median house price is the sale price of the middle home in a list of properties ranked from highest sale price to lowest over a set period of time.

Analysis of the rental prices indicates that the MDs are distinct in terms of monthly price, with clear variation between each MD. The highest contrast is evident between the average rents in Clane-Maynooth MD and Athy MD.

	Co. Kildare	Clane-Maynooth	Naas	Celbridge-Leixlip	Athy	Kildare-Newbridge
Q2 2019	1248	1395.465	1,276.43	1528.18	889.32	1063.225
Q2 2020	1328.59	1440.705	1,403.24	1495.2	940.26	1149.555
Q2 2021	1437.81	1520.525	1,484.06	1566.955	1035.51	1219.485
% change '19 – '20	6.5%	3.2%	9.9%	-2.2%	5.7%	8.1%
% change '20 – '21	8.2%	5.5%	5.8%	4.8%	10.1%	6.1%

Table 22 - Standardised Average Rent (RTB) for Kildare County and each Municipal District (Source: AIRO)

This rental value trends shown in Table 23 generally show correlation with the MD in which each settlement is located. However, there is some disparity between certain settlements within MDs. For the Clane-Maynooth MD, the annualised average monthly rent in 2020 for Maynooth is 26% higher than that for Kilcock and Clane. For the Naas MD, the annualised average monthly rent in 2020 for Naas town is 28% higher than that for Kilcullen.

Location	2016	2017	2018	2019	2020	Average year-on-year % change 2016-2020
State	1055	1061	1134	1226	1256	5%
Kildare County	1017	1106	1168	1229	1302	6%
Athy MD						
Athy	675	748	834	906	954	9%
Castledermot	714	801	857	913	991	9%
Monasterevin	787	880	940	955	994	6%
Kildare-Newbridge MD						
Kildare Town	833	932	1009	1042	1100	7%
Newbridge	931	1008	1062	1109	1151	5%
Rathangan	820	887	946	1011	1044	6%
Naas MD						
Naas	1099	1195	1255	1319	1396	6%
Sallins	1035	1129	1185	1237	1310	6%
Kill	1095	1153	1240	1367	1391	6%
Kilcullen	929	1006	1064	1087	1091	4%
Clane-Maynooth MD						
Maynooth	1248	1345	1404	1500	1592	6%
Clane	1010	1096	1184	1224	1263	6%
Kilcock	999	1084	1140	1183	1247	6%

Celbridge-Leixlip MD						
Celbridge	1137	1233	1292	1346	1399	5%
Leixlip	1219	1305	1344	1386	1445	4%

Table 23 - Standardised Average Monthly Rent (RTB) for State, County Kildare, and main towns
(Source: AIRO)

Rent Pressure Zones

Rent Pressure Zones have been applied to parts of the country where rents are highest and rising, and where households have the greatest difficulty finding affordable accommodation. They are intended to moderate the rise in rents in these areas and create a stable and sustainable rental market that allows landlords and tenants to plan financially for their future.

As per the “Designated Rent Pressure Zones - April 2020”, all LEAs (entirety of County Kildare) are designated Rent Pressure Zones.

Enacted on 9 July 2021, the Residential Tenancies (No. 2) Act 2021, requires that annual rent increases in RPZs are capped in line with general inflation, as recorded by the Harmonised Index of the Consumer Price (HICP). Previously, rent increases in RPZs were capped at 4% per year. RPZs were also extended until 31 December 2024. They were due to expire on 1 January 2022.

Short Term Lettings

In assessing the rental market in Kildare, the impact of short-term listing sites like Airbnb must be considered. Such platforms have resulted in significant numbers of properties being taken out of the traditional long-term rental market throughout the state. The government introduced regulations on short-term lettings on 1 July 2019. The regulations aim to bring properties used for short-term tourist lettings in Rent Pressure Zones (RPZs) back to the long-term rental market. These short-term regulations will continue until 31 December 2021. A Guidance Note for Local Authorities for Regulating Short-Term Letting, issued in July 2019 by the Department of Housing, Planning and Local Government July 2019 state that the short-term letting provisions will apply for as long as rent pressure zones are so designated, and that if, in 2021, there are still rental supply issues and the rent pressure zone designations are further extended, the new legislative provisions in relation to short-term letting will continue to apply. On foot of the Residential Tenancies (No. 2) Act 2021, enacted on 9 July 2021, RPZs were extended until 31 December 2024. By association, the short-term letting provisions /regulation are now also extended to 31 December 2024.

It is noted that Airbnb does not share its own data publicly, the only available information coming from third-party estimates. Data provided by Inside Airbnb indicates there are currently (as of August 2021) 365 properties listed on Airbnb in County Kildare, 33.4% of which are entire houses/apartments and 63.3% are private rooms. Inside Airbnb uses modelling to create estimates of the number of days a property has been booked on Airbnb, based on the number of reviews of that property.

Referring to ‘entire apartment / house’, data indicates that renting to a tourist full-time rather than a resident, has an estimated monthly income for the owner of €2,669, which is significantly higher than the income that would be received on the long-term rental market (data indicates that the monthly average rent in County Kildare in 2020 was €1,302 and in Q2 2021 was €1,437). This shows the continued profitability of short-term lets in County Kildare compared to a long-term rental option, a trend that is expected to continue with an increased disparity as further rent control measures take effect and the tourism trade returns to normality after Covid-19.

3.4 Existing Economic Overview

3.4.1 Employment / Labour Force

Principal economic status is recorded in the Census and provides an overview of the composition of a workforce and offers a useful snapshot in time for unemployment, as well as giving an indication of the proportion of students and retirees.

Labour Force Participation Rate

According to Census 2016, the total Labour Force residing in Kildare is 108,244 and is equivalent to 64.1% (Labour Force Participation Rate) of the total population 15+ (168,944) residing in Kildare. This rate is higher than the State (61.4%), EMRA (63.3%) and Eastern SPA (63%) averages. This data is presented in Figure 9. Relative to other local authorities, Kildare has the 5th highest Labour Force in the State the 4th highest Labour Force Participation rate. The highest rates in the State are in Fingal (66.9%) and Dublin City (64.7%) and the lowest in Cork City (55.2%) and Donegal (57.3%). Since 2011, there has been an increase of 4,018 (3.8%) to the Labour Force in Kildare. This is similar to the State where the total labour force has increased by 3.2%.

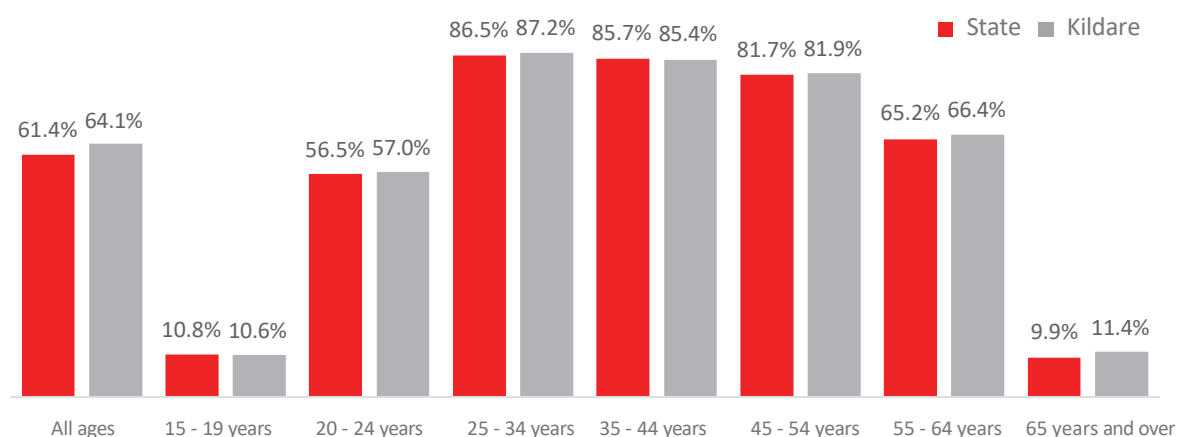
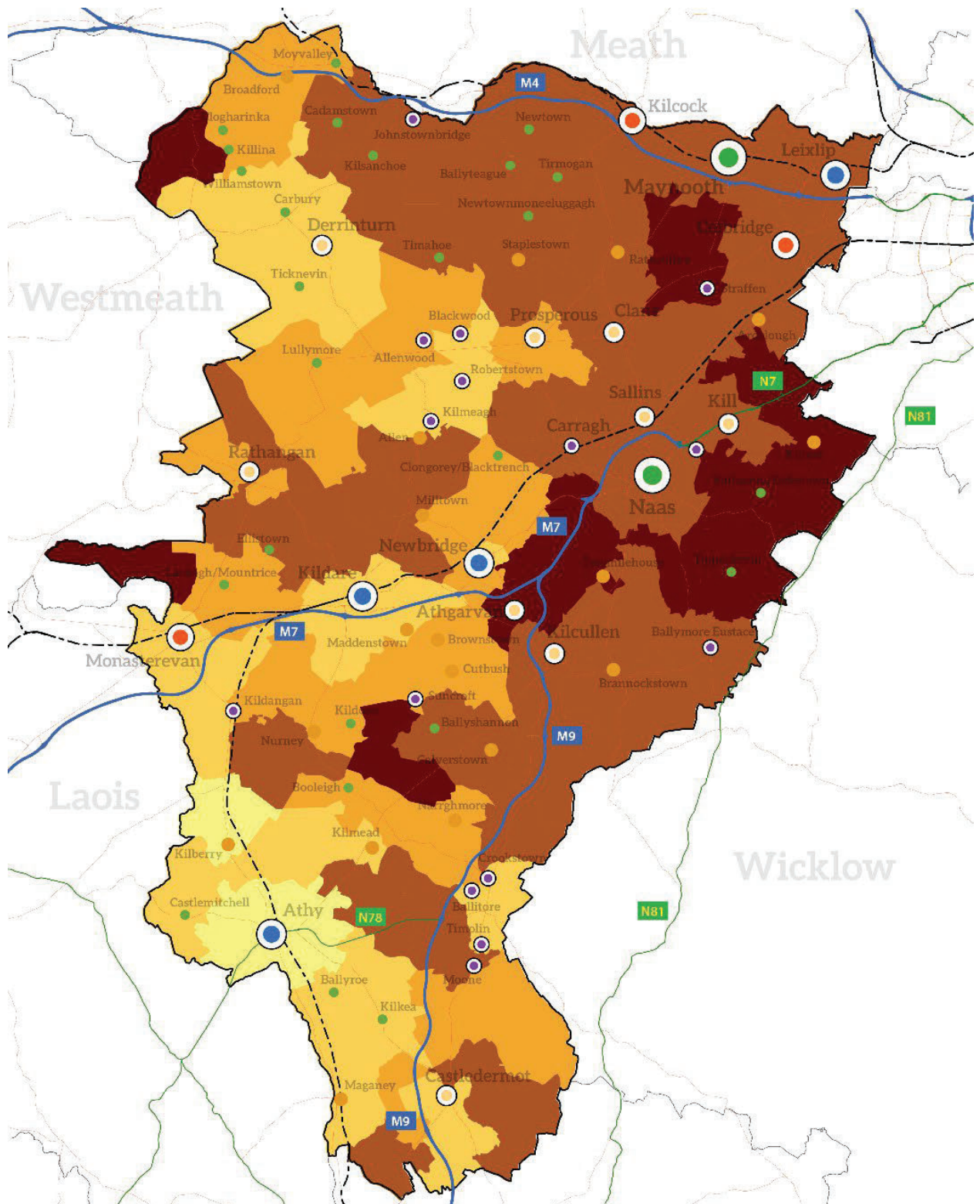
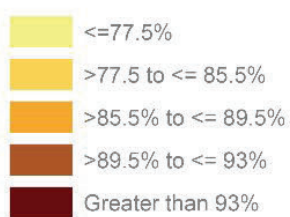


Figure 9 - Labour Force participation rate by age, Census 2016

At the Municipal District level, a small variation is evident with highest rates recorded in Celbridge-Leixlip (65.9%), Naas (65.8%) and Kildare-Newbridge (64.2%). In contrast, lower rates are found in Clane-Maynooth (62.8%) and Athy (61.1%). Across the settlement hierarchy the highest rates are recorded in Sallins (74.5%), Kilcock (72.5%), Clane (69%), Athgarvan (68.7%) and Celbridge (67.9%). The map in Figure 10 provides an illustration of the rates for Labour Force Participation across Kildare. In general, there is a varied distribution with the highest rates tending to be in close proximity to urban settlements across the county.



Labour Force Participation Rate, 2016



Kildare County Council
Comhairle Contae Chill Dara



© Ordnance Survey Ireland/Government of Ireland
© OpenStreetMap Contributors
Data Source: CSO, GeoDirectory & AIRO
Produced by: All Ireland Research Observatory (AIRO)

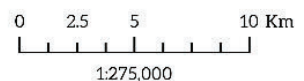


Figure 10 - Spatial distribution of labour force participation rate, County Kildare, Census 2016

Employment

According to the 2016 Census, and as represented in Figure 11, 57% of the population of Kildare (over 15 years) are employed. This compares to the State figure of 53%, reflective of the higher workforce present in County Kildare.

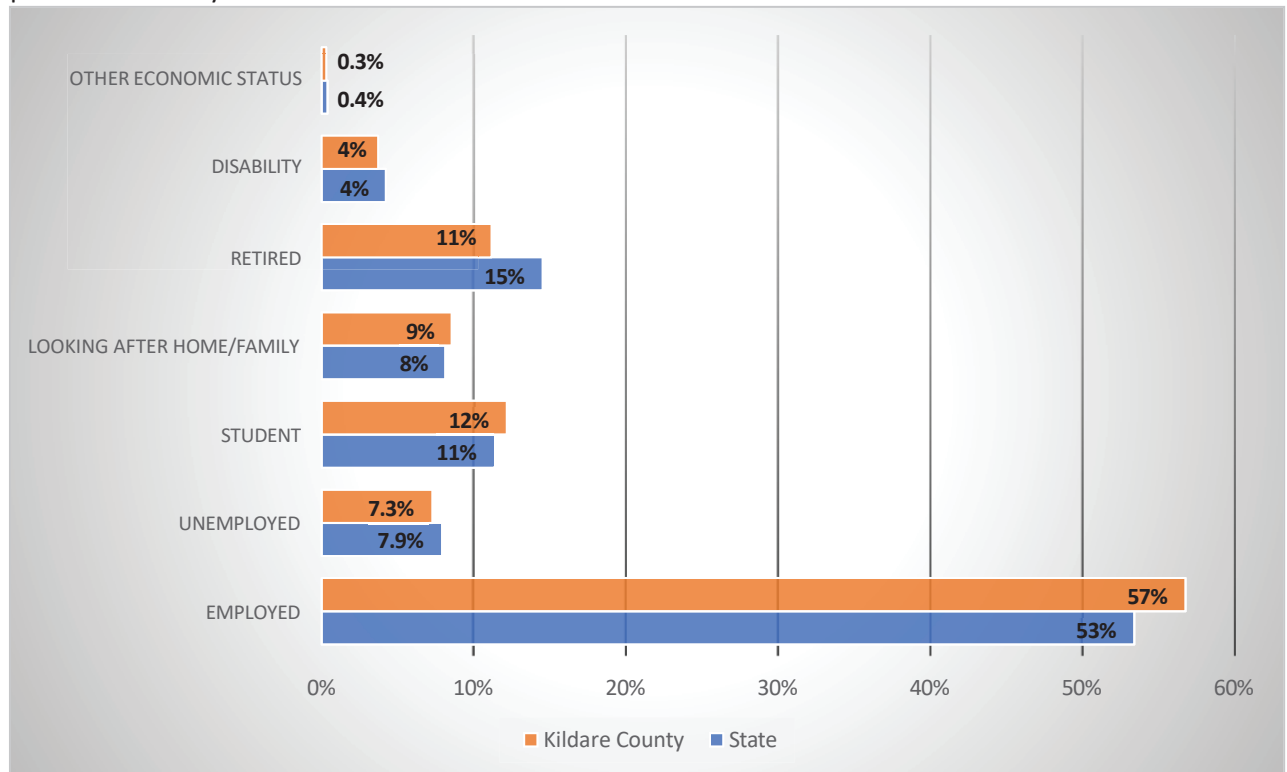


Figure 11 - Principal Economic Status within Kildare County and State, Census 2016

The rate of employment varied across the county with particularly high rates of employment in the Naas, Clane-Maynooth, and Celbridge-Leixlip MDs, as illustrated in Figure 12.

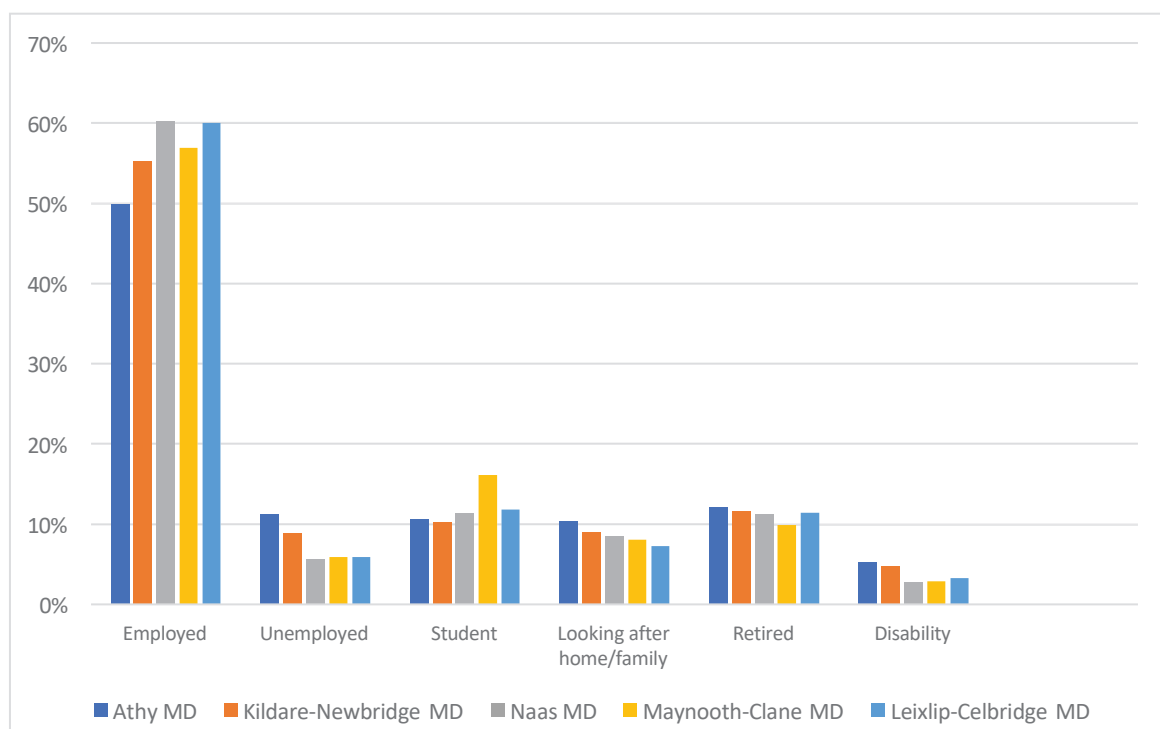


Figure 12 - Principal Economic Status for each MD in Kildare County, Census 2016

Inward / Outward Commuting

Table 24 provides Census 2011 and 2016 data on the number of persons who reside in County Kildare but who commute to another county for work. The table shows that in 2016, 33.6% of the 'working' population of Kildare (95,947) travel to one of the four local authority areas of Dublin for work. Meath, Wicklow, Carlow, Laois, together, account for a further 3.4% of those 'working' while 1.7% travel to other counties. This table infers that 61% of persons 'Working' and residing in County Kildare, have a place of employment within County Kildare. The rates are broadly similar to that recorded in Census 2011. In real terms, the number of people who commute out of County Kildare for work increased by 12% (+10,360 persons) in the intercensal period.

Outward Commuting from Kildare	2011		2016	
	Number of Persons	% of total persons 'Employed'	Number of Persons	% of total persons 'Employed'
Kildare to Dublin	28794	33.6%	32208	33.6%
Kildare to Meath	906	1.1%	969	1.0%
Kildare to Wicklow	810	0.8%	813	0.8%
Kildare to Carlow	685	0.8%	794	0.8%
Kildare to Laois	704	0.8%	750	0.8%
Kildare to other Counties	1460	1.7%	1604	1.7%
Total	33359	38.8%	37138	39%

Table 24 - *Outward Commuting from County Kildare, Census 2016*

Table 25 provides Census 2011 and 2016 data on the number of persons who reside outside County Kildare but who commute into County Kildare for work. This table provides important data from an economic perspective, showing that there was a 23% increase in the number of persons commuting into the county in the intercensal period.

Inward Commuting to Kildare	Number of Persons (2011)	Number of Persons (2016)
Dublin to Kildare	6426	7962
Laois to Kildare	2809	3189
Meath to Kildare	2148	2480
Offaly to Kildare	1343	1607
Wicklow to Kildare	995	1258
Carlow to Kildare	931	1073
Westmeath to Kildare	791	1009
Other County to Kildare	1802	2617
Total	17245	21195

Table 25 - *Inward Commuting to County Kildare, Census 2016*

Unemployment

According to Census 2016, the total labour force 'Unemployed' residing in Kildare is 12,297 and equates to 11.4% of the total labour force within the county. This rate is lower than the State (12.9%), EMRA (12.4%) and Eastern SPA (12.6%) averages.

Relative to other local authorities, Kildare has the 7th highest actual number of 'Unemployed' persons in the State, but terms of those unemployed as a percentage of the total workforce of the County, Kildare has the 5th lowest unemployment rate. The highest rates in the State are in Longford (19.6%) and Donegal (18%) and the lowest in Dún Laoghaire-Rathdown (7.4%) and Cork County (9.2%).

Since 2011, the rate has decreased from 17.9% to 11.4% and represents a drop of 6,342 (-34%) 'Unemployed' residing in Kildare.

Referring to Figure 13, at the Municipal District level, a significant variation is evident with highest rates recorded in Athy (18.3%) and Kildare-Newbridge (13.8%). In contrast, much lower rates are found in Naas (8.5%), Celbridge-Leixlip (8.9%) and Clane-Maynooth (9.4%). Across the settlement hierarchy the highest rates are recorded in Athy (26.6%), Derrinturn (21.9%), Kilmeage (19.6%), Monasterevin (18.5%) and Suncroft (18.3%). This analysis shows obvious disparities within MDs. Figure 14 provides a spatial overview of the rate of unemployment across County Kildare.

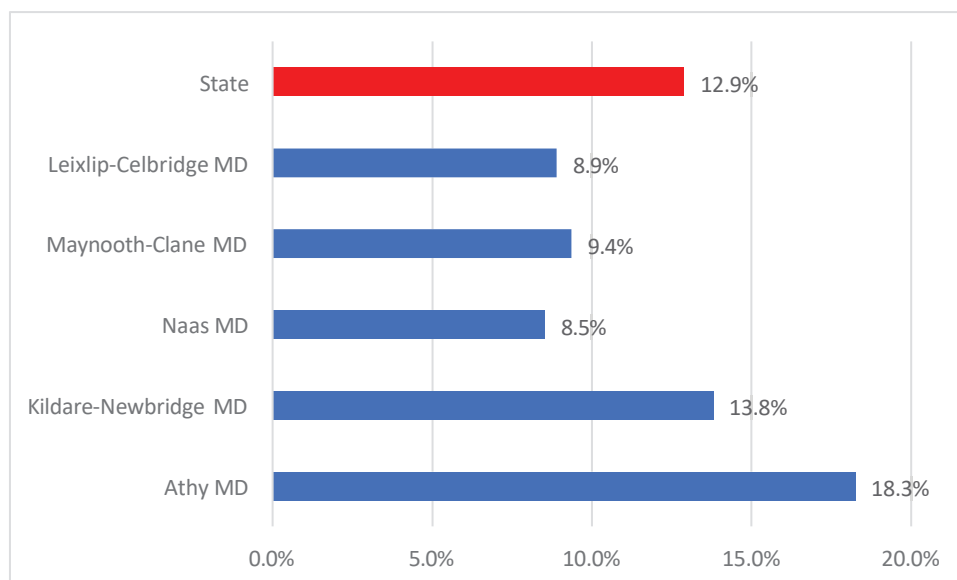
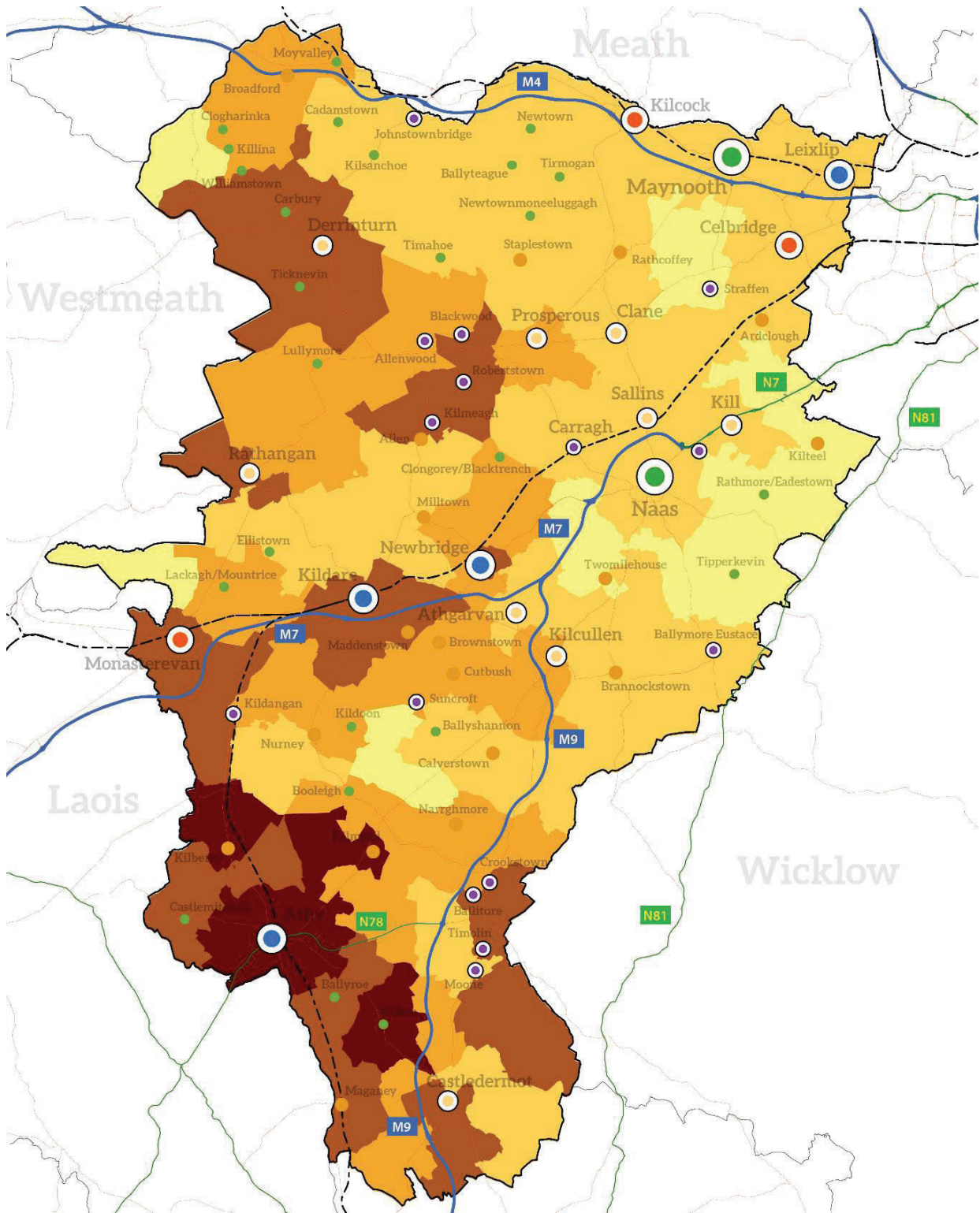
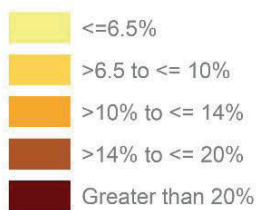


Figure 13 - Unemployment Rates as % of Labour Force, Census 2016



Unemployment Rate, 2016



© Ordnance Survey Ireland/Government of Ireland
 © OpenStreetMap Contributors
 Data Source: CSO, GeoDirectory & AIRO
 Produced by: All Ireland Research Observatory (AIRO)

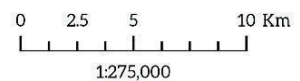


Figure 14 - Unemployment Rates across County Kildare (Census 2016, AIRO)

Age Dependency Ratios

The dependency ratio is a measure of the number of dependents aged zero to 14 and over the age of 65, compared with the total population aged 15 to 64. This demographic indicator gives insight into the number of people of non-working age, compared with the number of those of working age.

	0-14 Years	15-64 Years	65+ Years	Young Age Ratio (%)	Old Age Ratio (%)	Total Dependency Ratio (%)
Age Dependency	53,560	146,930	22,014	36.5%	15%	51.43%

Table 26 - Age Dependency Ratio 2016 (Source CSO)

Young Dependency (0-14 years)

This cohort of population is 'dependent' on the working / independent population for support and services. The Youth Dependency Rate (0-14) is calculated by taking the population aged 0 to 14 and calculating it as a proportion of the population aged 15 to 64. According to Census 2016, the Youth Dependency Rate in Kildare was 36.5%. This rate is higher than the State ratio of 32.3% and the EMRA rate of 31.6% but marginally lower than the Eastern Strategic Planning Area (SPA) rate of 36.8%.

Relative to other local authorities, Kildare County has the 5th highest number of children aged 0-14 (53,560) in the State and the 6th highest rate as a proportion of the total county population, with Cavan, Fingal, Longford, Laois and Meath with higher rates. The rate in 2016 is marginally higher than the 2011 rate of 36.3%. At the Municipal District level there are marginal differences with highest rates in the Athy MD (39.1%) and lowest rates in the Celbridge-Leixlip MD (34%). Across the settlement hierarchy there are some locations with very high rates such as Carragh (58.9%), Kilmeague (48%), Derrinturn (47%) and Kilcock (45.8%).

Old Dependency

The '65 and over' age cohort now represents 9.9% of the total population living in the county - the 2nd lowest rate in the State. However, since 2011 this cohort has increased by 32% and was one of the highest rates of increase in the State. As such, this is a major increase in the older population across the county and will result in an increased demand on older persons services. At the Municipal District level there is considerable difference in rates with the Athy MD having the highest rate at 11.4%. In contrast, both Celbridge-Leixlip (9.4%) and Clane-Maynooth (9.4%) have much lower rates. There are also very different rates in both Urban (8.7%) and Rural Kildare (13.1%). Settlements with the highest rates are Ballymore Eustace (14.2%), Suncroft (13.8%), Leixlip (12.2%) and Athy (11.1%).

Deprivation Index

The Pobal HP Deprivation Index is a series of maps measuring the relative affluence or disadvantage of a particular geographical area in the State, using data compiled from various censuses. Three dimensions of affluence/disadvantage are identified: Demographic Profile, Social Class Composition and Labour Market Situation. The Kildare Population by Pobal Deprivation Index Classification as recorded under Census 2016 is shown in Figure 15.

Based on the Relative Index Scores for 2016, Kildare as a whole is the 5th most affluent local authority (based on 34 local authorities) in the country with a score of 3.2 (marginally above average). This relative score (5th affluent) is the same as 2011 but lower than the 3rd most affluent score from Census 2006.

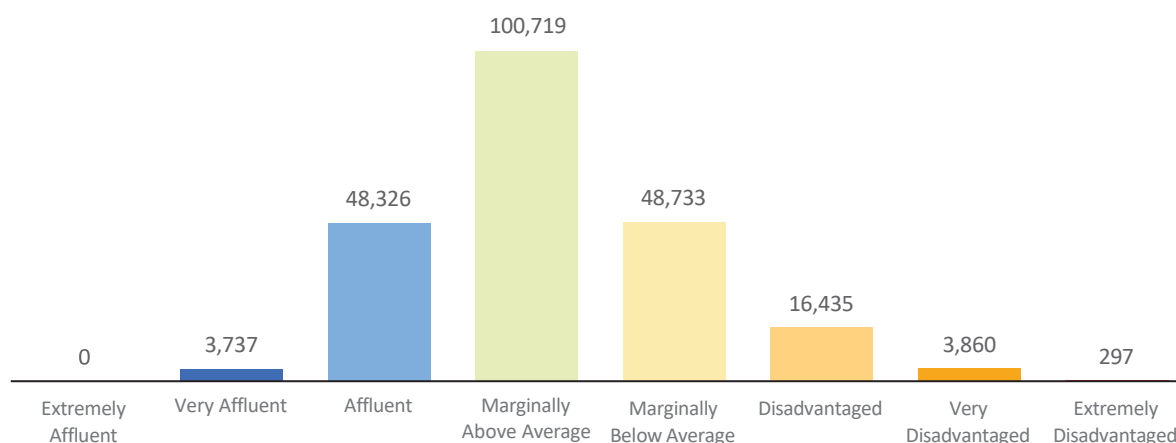
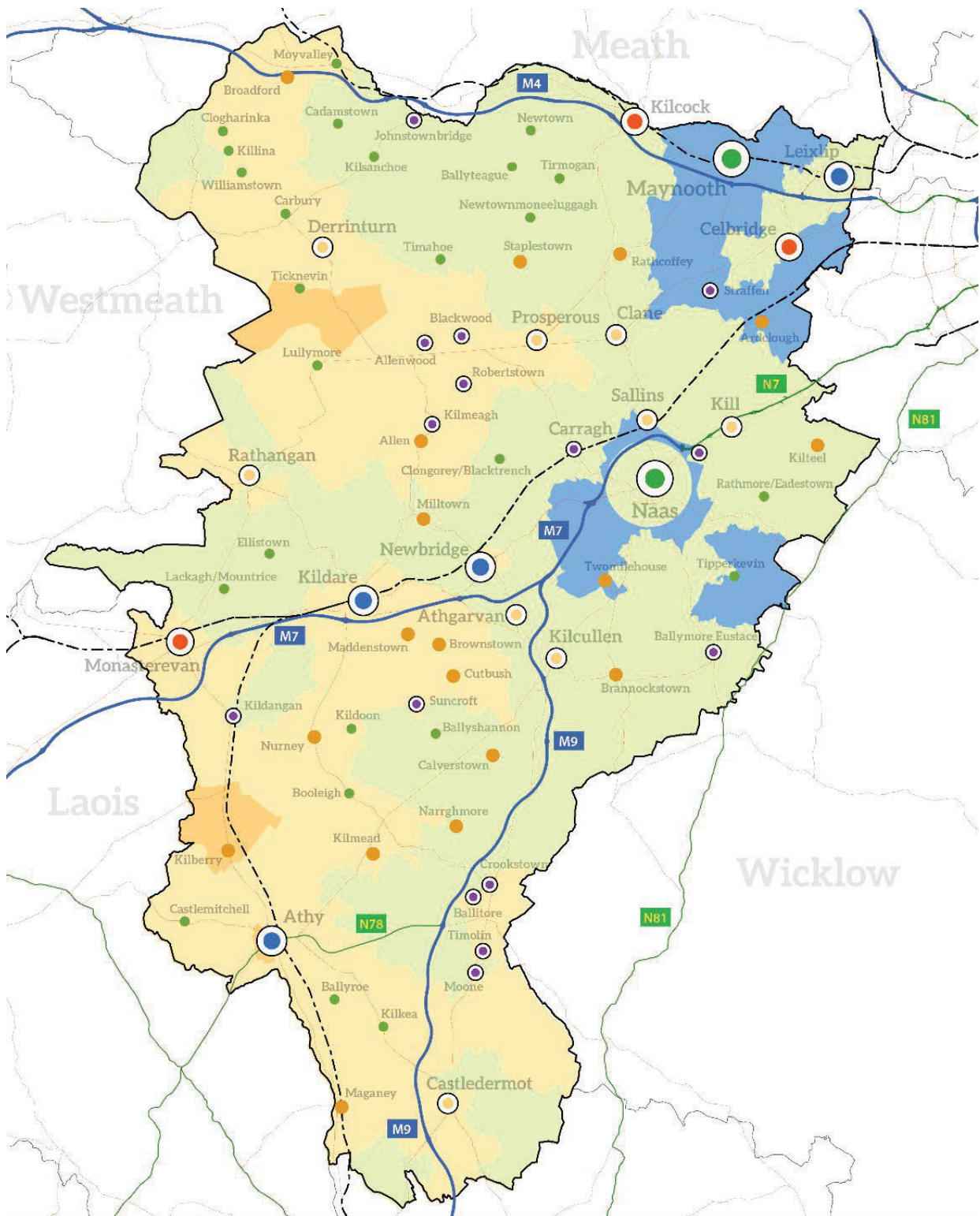


Figure 15 - Kildare Population by Pobal Deprivation Index Classification, 2016 (2016 Pobal HP Deprivation Index)

In terms of spatial distribution, and referring to the map in Figure 16, the county does not have many areas in the extremes of either disadvantage or affluent. Most of the Small Areas are in the categories just above or below the average with 45% classed as marginally above average, 23.7% classed as marginally below average, 7.4% classed as disadvantaged, 2.1% classed as very disadvantaged and 0.1% classed as extremely disadvantaged (referring to 1 Small Area in Athy West Urban ED). A total of 20.2% of Small Areas are classed as affluent and the remaining 1.4% are classed as very affluent.

There is a very clear spatial pattern with the most affluent areas in close proximity to Naas and in the Maynooth and Celbridge areas. The most disadvantaged parts of the county are in the peripheral west and south of the county in areas close to Athy - the most disadvantaged MD in the county.



Pobal HP Deprivation Index, 2016
Relative Score

- Extremely Affluent
- Very Affluent
- Affluent
- Marginally above Average
- Marginally below Average
- Disadvantaged
- Very Disadvantaged
- Extremely Disadvantaged

Settlement Hierarchy

- Key Town
- Self Sustaining Growth Town
- Self Sustaining Town
- Town
- Village
- Rural Settlement
- Rural Node



Kildare County Council
Cúirtle Contae Chill Dara



© Ordnance Survey Ireland/Government of Ireland
© OpenStreetMap Contributors
Data Source: CSO, GeoDirectory & AIRO
Produced by: All Ireland Research Observatory (AIRO)

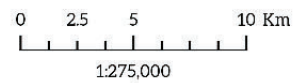


Figure 16 - Pobal HP Deprivation Index, 2016, for County Kildare

3.4.2 Median Gross Income

Gross income is the income before tax is deducted, while the gross median income is the amount that divides a population into two equal groups, half having an income above that amount, and half having an income below that amount. The gross median household income for County Kildare in 2016 was €54,472⁸, the third highest in the State, behind Dun Laoghaire-Rathdown and Fingal, and higher than the State average of €45,256.

In order to estimate current gross median household income, historic growth in the nominal median household disposable income at State level has been reviewed. Table 27 shows the growth in the period 2015 to 2019⁹. The table shows, on average, a 4% annual change in the nominal median household disposable income for the State over the period 2014 to 2019. Applying 4% annual growth, it is estimated that the gross median household income for County Kildare in 2021 is €66,273.

	Nominal median household disposable income (State)	% change
2013	34436	
2014	35305	3%
2015	37401	6%
2016	38953	4%
2017	39499	1%
2018	42865	9%
2019	43552	2%
	Average % change year-on-year	4%

Table 27 - Nominal median household disposable income, State, 2013 – 2019 (Source: CSO)

Disposable income is the amount of income, after tax is deducted, that is available for spending and saving. It functions as an important measure of housing affordability in an area i.e. the ability of a household to purchase their own home. The CSO's latest preliminary data relating to County Incomes and Regional GDP for 2018¹⁰ outlines the average annual disposable income at State, Regional and County Levels. The average annual disposable income in Kildare County was €23,828. In comparison, the average annual disposable income across the State was €21,495.

3.4.3 Central Bank Rules and Affordability

The Central Bank of Ireland have implemented measures on mortgages to manage the amount that consumers can borrow to purchase a home. These measures are enforced via the loan-to-value (LTV) and loan-to-income (LTI) limits for mortgages. The LTV limit requires a customer to have a minimum deposit before one 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. The LTI limit restricts the amount of money a customer can borrow to a maximum of 3.5 times ones gross income.

⁸ CSO, Geographical Profiles of Income in Ireland 2016

<https://www.cso.ie/en/releasesandpublications/ep/p-gpii/geographicalprofilesincomeireland2016/incomeireland/>

⁹ Survey on Income and Living Conditions (SILC) 2019

<https://www.cso.ie/en/releasesandpublications/ep/p-silc/surveyonincomeandlivingconditionssilc2019/income/>

¹⁰ CSO - County Incomes and Regional GDP for 2018

<https://www.cso.ie/en/releasesandpublications/er/cirgdp/countyincomesandregionalgdp2018/>

The HNDA Tool analyses whether households 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 particular decile can qualify for a mortgage to purchase a house within a given year are:

- Loan-to-Value (LTV) ratio of 0.90;
- a maximum Loan-to-Income (LTI) ratio of 3.5; and
- the upper value of the first house price band for that year.

As such if a household does not have sufficient income to meet the Central Bank rules (i.e. 3.5 times their gross income being less than 90% of the purchase value of a house in the lowest projected price band for that year), they will not qualify for a mortgage that would enable them to purchase a home in their relevant area.

In the current market, an application of the new central bank guidelines (LTV 90% for principle dwelling house based on a median house price in County Kildare of €317,500) results in a requirement for a minimum deposit of 10% of the value of the house to support a mortgage application which would require a minimum deposit of c. €31,750 for a principle dwelling house in Kildare, and an annual gross household income of €81,642. It has been estimated that the average income in Kildare is €66,273 and therefore at present a household on the average income would struggle to afford a dwelling and mortgage at the average price.

Table 28 examines affordability at County and MD level. The Median Gross income for the MDs has been extrapolated from the Census 2016 ED level data and projected forward to 2021 by applying a 4% per annum growth rate. The table indicates that at present there is an affordability issue in the County and particularly in the Naas MD, Clane-Maynooth MD and Celbridge-Leixlip MD.

	Median House Prices 2021	Central Bank Mortgage Rules		Estimated Median Gross Income 2021
		10% Deposit	Gross Income required	
County	317500	31750	81643	66273
Athy MD	224590	22459	57752	56599
Kildare-Newbridge MD	260000	26000	66857	65382
Naas MD	317137	31713.7	81550	76760
Clane-Maynooth MD	322500	32250	82929	61592
Celbridge-Leixlip MD	348018	34802	89490	77260

Table 28 - Existing affordability analysis, County and MD level (Source CSO/AIRO)

In terms of mortgage approvals, the Banking and Payments Federation of Ireland's Mortgage Approvals Report¹¹, Sept 2021, reported that, on a national level, a total of 4,572 mortgages were approved in August 2021, with first-time buyers (FTBs) being approved for 2,462 mortgages (53.8% of total volume) while mover purchasers accounted for 1,181 (25.8%). The BPF Housing Market Monitor Q2 2021¹² reported a 'strong effective demand for housing reflected in the pipeline for housing

¹¹ BPF Mortgage Approvals Report
<https://bpf.ie/publications/bpfi-mortgage-approvals-august-2021/>

¹² BPF Housing Market Monitor Q2 2021

supports and mortgages with some 26,000 applications for the government's Help to Buy scheme in the first seven months of the year'.

There have been 3,185 Help to Buy (HTB) scheme claims¹³ in County Kildare to date, noting a close correlation with affordability and the rate of first-time buyers in the Kildare housing market, accounting for an average 42% of house transactions since 2019, compared to the State average of 32% in the same period.

3.5 Conclusions on Key Housing Market Drivers

Area of interest	Key Issues Identified
<p>Demographic issues for the local housing market</p>	<ul style="list-style-type: none"> • Over a 20-year period (1996 to 2016), Kildare experienced a 64.8% (+87,512) increase in its population base - the second highest rate in the State, compared to the state average of 31.3%. This is explained by a strong performance in natural increase (birth rate) and a strong performance in estimated net migration. • Population of County Kildare is expected to rise by just short of 44,000 persons between 2016 and 2031, which equates to a 19.7% increase. • Kildare has a pronounced pattern of urban settlement with 68% of the population living in urban areas and 32% living in rural areas. It has 18 urban towns, 16 villages, 18 rural settlements and 12 rural nodes. The pronounced pattern of urban settlement is closely correlated to the fact that the county is densely populated, with highest density levels in the towns of Sallins, Celbridge, Kilcock, Leixlip and Kill. • Notwithstanding the modest increase in household size between 2011 and 2016, it is likely that household size will start to fall again. The National Planning Framework indicates that the average household size is expected to decline nationally to 2.5 persons by 2040. By the end of the HND period, 2031, it is forecast that the average household size will fall to 2.77. • With respect to age structure, the steady increase in the proportion of the County that is over 45 will, in due course, require additional provision to be made for housing suitable for 'empty nesters' and older persons in need of specially adapted housing or housing with relevant services, noting that the 2016 Housing Agency report, 'Housing for Older People – Thinking Ahead', estimates that 15% of those aged 65+ would be willing to move to a different home in their community; 15% would choose to move to age-friendly accommodation, if it were available; 4% of older people would live in nursing homes; with an estimation that 66% of those over 65 would prefer to stay in mainstream housing. • At the other end of the spectrum, the proportion of those in the 15-24 age cohort has been falling, albeit with a slight uplift in 2016, which may suggest an easing off on the pressure for new 'starter homes' from those already resident in the County during the lifetime of this strategy, as these are likely

<https://bpfi.ie/wp-content/uploads/2021/09/BPFI-Housing-Market-Monitor-Q2-2021-web.pdf>

¹³ Help To Buy (HTB) Incentive Statistics – Revenue publication, 30th September 2021

Area of interest	Key Issues Identified
	<p>to be the persons seeking such housing up to 2029.</p> <p>However, given the increase in population in the under 14 age cohort, albeit with a slight downward shift in 2016, this easing off is unlikely to continue beyond 2029, when this large cohort is likely to start requiring housing of their own. Analysing movement of population through the age cohorts since 2016, indicates an increasing proportion of the population within the 25-34 age cohort by 2031 and again by 2040, suggesting further growth in new household formations and potentially pressure on new 'starter homes', again potentially 1 or 2 bed units.</p> <p>In addition, according to Census 2016, 79% of all 2 person households were either a married couple or cohabitating couple household with no children, compared to the State average of 66%, and while a proportion of these may be 'empty nesters', there is a strong likelihood that many of these households could expand to 3 or 4 person households within the lifetime of this strategy.</p> <ul style="list-style-type: none"> • It is noted that c.52% of the property transactions in 2020 were in the range of €200,000 to €350,000 price range, with c.30% of properties selling for more than €350,000. • The increase in renting from the private sector does not necessarily imply an increased demand for this type of housing, but instead a lack of finance to purchase and a lack of supply of new homes on the market. Any housing strategy must ensure that there is an adequate supply of zoned and serviced land to address the supply side as the demand appears to be there – the obstacle to be addressed being funding for both the developer and the purchaser. <p>With student numbers at Maynooth University expected to increase to 14,500 by 2022, demand for student housing can be expected to increase exponentially in Maynooth and in the adjacent towns of Kilcock and Leixlip, up to and beyond these years.</p>
<p>Affordability issues for the local housing market</p>	<ul style="list-style-type: none"> • The volume of residential property transactions in County Kildare increased by an average of 16% year-on-year between 2014 and 2019, followed by a contraction in 2020 mainly due to Covid-19 related supply issues. • Between 2016 and 2020, 35% of dwelling sales in County Kildare were new builds, compared to the State average of 20%. • While transaction volumes were lower in 2020, the prices have consistently grown since 2012 reaching highs of €323,994 in 2020. • Approx. 52% of the residential property transactions in County Kildare in 2020 were in the range of €200,000 to €350,000 price range, with c.30% of properties selling for more than €350,000.

Area of interest	Key Issues Identified
	<ul style="list-style-type: none"> • The mean price of a dwelling in County Kildare increased by 3% in 2020, compared to the State average of 0.79%. Furthermore, analysis of the CSO Residential Price Index shows that mean residential property prices increased by 10.5% in the year to July 2021. • In terms of mean price distribution, the mean price for the five Kildare MDs in Q2 2021 shows the Kildare-Newbridge, Naas, Clane-Maynooth and Celbridge-Leixlip MDs all exceeding €300,000, while the mean price in the Athy MD is €224,590. However, between 2016 and Q2 2021, the mean price in Athy MD increased by 40%, second highest to Kildare-Newbridge MD, at 57%, compared to increases for Naas MD, Clane-Maynooth MD and Celbridge-Leixlip MD of 17%, 28% and 11%, respectively. • The median price of a dwelling in County Kildare was €317,500 at the end of Q2 2021; this is a significant rise from the median house price of €175,000 in 2012; and equates to a 10.2% increase from the 12 months previous. • The average annual disposable income in Kildare County in 2018 was €23,828, compared to the State average of €21,495. • The gross median household income for County Kildare in 2016 was €54,472, compared to the State average of €45,256. • Kildare households have an estimated gross median household income of €66,273 (in 2021), below the income necessary to afford median priced houses in the county, based on current Central Bank rules, and this indicates an emerging discrepancy between house prices and affordability in Kildare. Analysis would indicate that at present the housing affordability issue applies predominantly to the Naas MD, Clane-Maynooth MD and Celbridge-Leixlip MD. • There have been strong trends in mortgage approvals in the State, with demand largely driven by first-time buyers who made up almost 58% of total volume and value of approvals. • First time buyers accounted for on average of 42% of house transactions in County Kildare since 2019, compared to the State average of 32%. • There have been 3,185 Help to Buy (HTB) scheme claims¹⁴ in County Kildare to date, noting a close correlation with the rate of first-time buyers in the Kildare housing market, accounting for an average of 42% of house transactions since 2019, compared to the State average of 32% in the same period. • The supply of houses continues to be constrained by Covid-19 pandemic related issues, particularly with respect to the availability of labour force and availability/cost of materials. • The RTB Index shows that in County Kildare rents grew by 6.5% in the year

¹⁴ Help To Buy (HTB) Incentive Statistics – Revenue publication, 30th September 2021

Area of interest	Key Issues Identified
	<p>to Q2 2020 and 8.2% in the year to Q2 2021, the former being in line with a national average increase of 8%.</p>
<p>Economic issues for the local housing market</p>	<ul style="list-style-type: none"> • County Kildare has the 5th highest Labour Force in the State and, at 64.1%, the 4th highest Labour Force Participation rate (Census 2016) • 57% of the population of Kildare (over 15 years) are employed (95,947 persons). This compares to the State figure of 53%, reflective of the higher workforce present in County Kildare (Census 2016) <p>Of those persons employed, 39% (37,138) commute out of County Kildare for work, with the majority (33.6%) commuting to one of the four local authority areas of Dublin.</p> <p>On the other hand, according to Census 2016, 21,195 persons commute into County Kildare for work, which represents a 23% increase from the 2011 figure.</p> <ul style="list-style-type: none"> • The total labour force ‘Unemployed’ residing in Kildare is 12,297 and equates to 11.4% of the total labour force within the county. This rate is lower than the State (12.9%), EMRA (12.4%) and Eastern SPA (12.6%) averages (Census 2016) <p>Since 2011, the unemployment rate has decreased from 17.9% to 11.4% and represents a drop of 6,342 (-34%) ‘Unemployed’ residing in Kildare (Census 2016).</p> <ul style="list-style-type: none"> • The Corporation Tax rate increase to 15%¹⁵ for higher revenue companies may have a longer-term impact on some housing markets exposed to a high dependency on FDI companies. • Zoned Land Tax introduced in Budget 2022 may have a positive impact on the supply of houses in the medium term. • Supply of housing in County Kildare is hinged on the expectation of the delivery of key infrastructure to support / facilitate new houses, including water services, roads, transportation, and telecommunications. Key projects such as the delivery of the Eastern Ring Road in Maynooth (funded under the Local Infrastructure Housing Activation Fund) is critical for the release of land for residential development in the town, with the subject land to the south- east of Maynooth having the potential to deliver between 800 and 1,200 new houses.

¹⁵ OECD Global Tax Agreement, expected to take effect in 2023

4. Housing Stock and Housing Need

This section addresses Section 2 of the HNDA analysis in line with the Guidance on the Preparation of a HNDA. Key outputs from this stage include: an analysis of the entire housing stock (owner occupied, private rented and all social) by, for example, size, condition, tenure and turnover; analysis of Kildare County Council's own stock, the location of areas where there is undersupply or low demand; opportunities for more effective use of the housing stock.

4.1 Existing Housing Stock and Composition

Kildare has the eighth largest housing stock in the State with total stock (occupied and unoccupied) recorded at 80,158 in the 2016 Census. Of this total, 91.9% of stock was occupied, 0.2% holiday homes, 5.7% vacant and 2.3% temporarily absent. According to the 2016 Census, the total number of occupied households within Kildare was 73,348. This represents 4.3% of the State total (1.7 million), 9% of the Eastern & Midlands Regional Assembly (800k) and 31.7% of the Eastern Strategic Planning Area (SPA) (231,577).

Traditionally, growth patterns have been uneven throughout the county with the north-eastern parts of the county experiencing higher rates of growth - driven by its proximity to the Greater Dublin Area commuter belt. An analysis of the age of housing stock built since 2001 in the county reveals that almost 26% of all housing built in Kildare was located in the Clane-Maynooth MD, followed by Kildare-Newbridge (24.5%). The lowest volume of new housing was built in the Athy MD (17.9%).

Over 89% or 65,663 of occupied housing in Kildare is classed as conventional housing (detached / semi-detached / terraced). This rate is higher than the State average of 86.5%. Represented in Figure 17, Flats and Apartments represent 9.5% (6,974) of housing which is lower than the State average of 11.8%. In the intercensal period, 2011 to 2016, however, the number of Flats and Apartments in Kildare increased by 15.4% which, while it is close to the State average of 14.8%, suggests a shift in development trends towards Flats and Apartments.

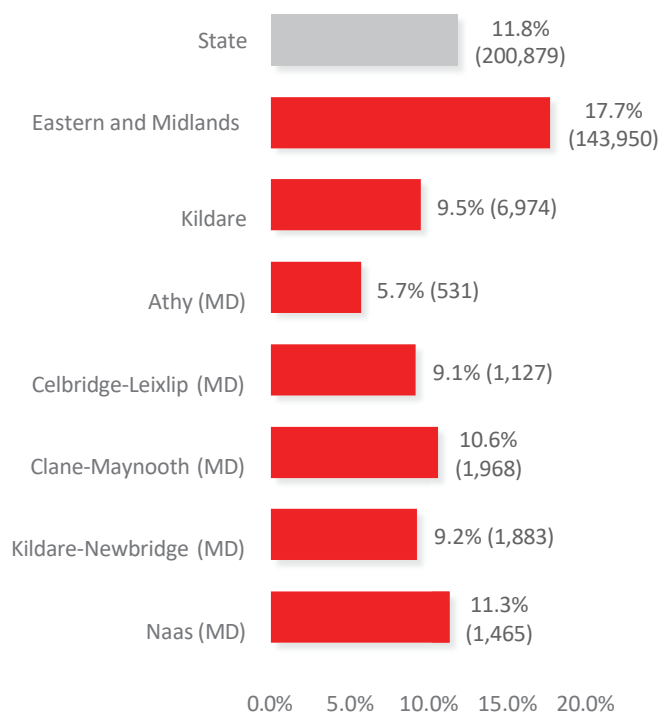


Figure 17 - Apartments/Flats as a percentage of total housing stock in County Kildare, Census 2016

4.1.1 Housing Tenure

According to the 2016 Census, and with figures shown in Table 29, the number of households classed as ‘Owner Occupied’ in Kildare was 52,806 and represents 72% of the total households, higher than the State (67.6%) and EMRA (64.9%) averages. Relative to other local authorities, Kildare has the 6th highest number of ‘Owner Occupied’ households in the State and the 13th highest rate in terms of ‘Owner Occupied’ as a percentage of total stock. The graph in Figure 18 shows that the number of households classed as ‘Owned with Mortgage or Loan’ decreased from 46% to 41% between 2011 and 2016, following the state trend, a stat influenced by the continued economic downturn for much of the intercensal period. Central Bank’s Financial Stability Notes 2021, No. 9¹⁶ reports on mortgage lending in Ireland since the early 2000s. The publication reports that ‘*Owner-occupier mortgage drawdowns from Ireland’s main lending institutions peaked at €32 billion in 2006. Lending contracted by 93 per cent over the next five years to a low of €2.4 billion in 2011, as a result of fewer transactions and lower property prices. Lending grew continuously between 2014 and 2019 to almost €10 billion, before declining in 2020, due to a fall in the number of property sales at the beginning of the COVID-19 pandemic in Ireland.*’

	Owner Occupier All	Owned with mortgage or loan	Owned outright	Rented from private landlord	Rented from Local Authority	Rented from voluntary/co-operative housing body	Occupied free of rent	Not stated	All Rented	Social Rented
Kildare	52806	30295	22511	12629	4497	742	1061	1613	17868	5239
% Households	72.00%	41.30%	30.70%	17.20%	6.10%	1.00%	1.40%	2.20%	24.40%	7.10%
EMRA	528051	272550	255501	166863	70503	8698	10403	29176	246064	79201
% Households	64.90%	33.50%	31.40%	20.51%	8.67%	1.07%	1.28%	3.59%	30.24%	9.73%
State	1147552	535675	611877	309728	143178	16765	27440	53002	469671	159943
% Households	67.60%	31.56%	36.04%	18.25%	8.43%	0.99%	1.62%	3.12%	27.67%	9.42%

Table 29 - Housing Tenure for Kildare, EMRA and State, 2016 (Source: CSO / AIRO)

¹⁶ Mortgage lending in Ireland during the 2010s

[https://www.centralbank.ie/docs/default-source/publications/financial-stability-notes/no-9-mortgage-lending-in-ireland-during-the-2010s-\(gaffney-and-kinghan\).pdf](https://www.centralbank.ie/docs/default-source/publications/financial-stability-notes/no-9-mortgage-lending-in-ireland-during-the-2010s-(gaffney-and-kinghan).pdf)

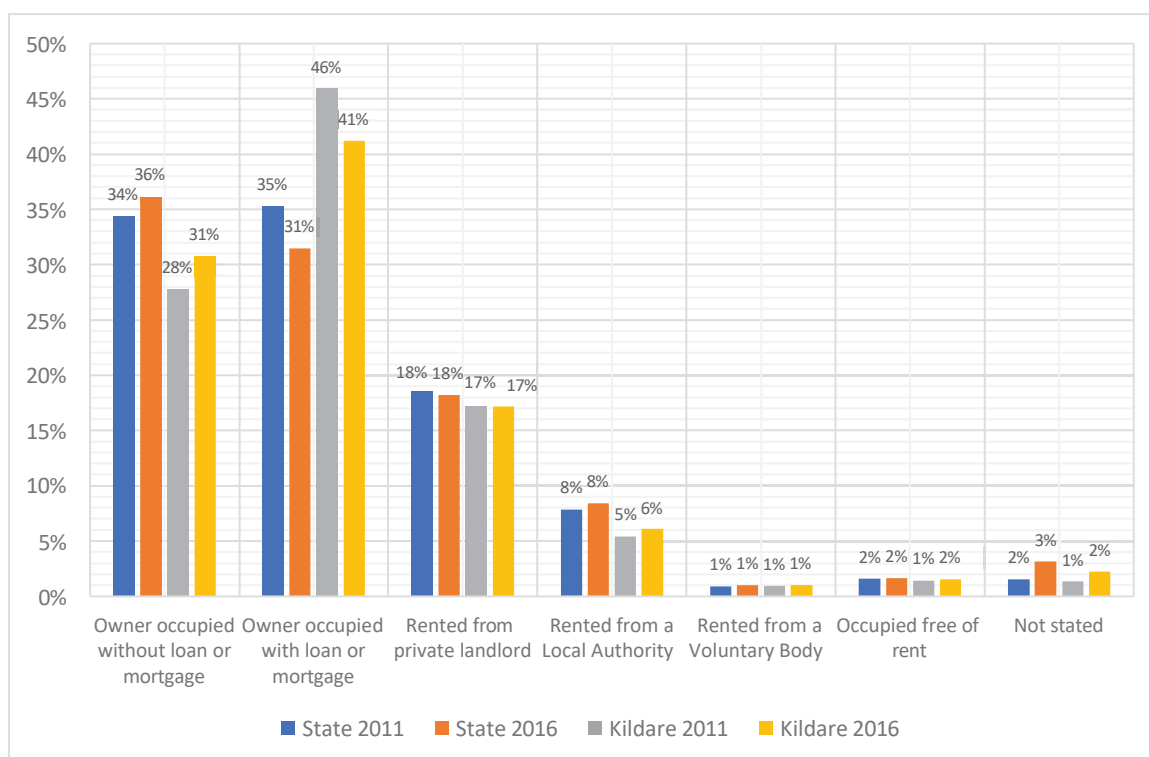


Figure 18 - Nature of Occupancy 2011 and 2016, Kildare County and State (Source: CSO)

Table 30 provides housing tenure data for the five MDs in County Kildare. In respect of ‘Owner Occupier – All’, there is a small variation with the highest rates recorded in Celbridge-Leixlip (76.2%) and Naas (72.5%). In contrast to this, Clane-Maynooth (71.4%), Athy (71.1%) and Kildare/Newbridge (69.7%) have lower rates. The disparities at MD level appear in the rental sector. For the Naas MD, 20.1% of households rent from a private landlord, and 6.3% are classified under ‘social rented’, which comprises either renting from the local authority or from a voluntary/co—operative housing body (commonly known now as Approved Housing Bodies). In Athy, 13% of households rent from a private landlord, and 10.7% are classified under ‘social rented’. There is a noted correlation between the proportion of ‘Social Rented’ tenure in the Athy MD and the relative deprivation score of Marginally Below Average / Disadvantaged / Very Disadvantaged for the MD.

	Occupied Housing Stock	Owner Occupier All	Owned with mortgage or loan	Owned outright	Rented from private landlord	Rented from Local Authority	Rented from voluntary/co-operative housing body	Occupied free of rent	Not stated	All Rented	Social Rented
Naas (MD)	12930	9185	5275	3910	2596	733	85	166	165	3414	818
% Households		71.0%	40.8%	30.2%	20.1%	5.7%	0.7%	1.3%	1.3%	26.4%	6.3%
Kildare-Newbridge	20328	14139	8223	5916	3509	1445	292	342	601	5246	1737
% Households		69.6%	40.5%	29.1%	17.3%	7.1%	1.4%	1.7%	3.0%	25.8%	8.5%
Clane-Maynooth	18559	13477	7978	5499	3425	925	65	285	382	4415	990
% Households		72.6%	43.0%	29.6%	18.5%	5.0%	0.4%	1.5%	2.1%	23.8%	5.3%
Celbridge-Leixlip	12319	9386	5449	3937	1898	552	160	107	216	2610	712
% Households		76.2%	44.2%	32.0%	15.4%	4.5%	1.3%	0.9%	1.8%	21.2%	5.8%
Athy	9212	6619	3370	3249	1201	842	140	161	249	2183	982
% Households		71.9%	36.6%	35.3%	13.0%	9.1%	1.5%	1.7%	2.7%	23.7%	10.7%

Table 30 - Housing Tenure for Kildare MDs, 2016 (Source: CSO)

4.1.2 Housing Stock Issues

The HNDA requires that the housing stock profile should include housing stock pressures and management issues, for example overcrowding, obsolescence, vacancy and dwellings requiring upgrade or renovation, etc. Much of the data is available through the HNDA data source, linked to the most recent Census of population. Local Authorities are encouraged to use locally sourced data, where possible, and to begin building a comprehensive picture of the entire housing stock in their area over time.

Data on vacancy, overcrowding and obsolescence of private housing stock in County Kildare is outlined below. Much of the data is obtained from the HNDA centralised repository.

4.1.2.1 Vacancy

Table 31 shows the vacancy rate for Kildare County in 2016 was 5.9%, down from 8% in 2011.

Census Year	Total Housing Stock	Vacant	Vacancy Rate
2011	78,794	6,311	8%
2016	80,158	4,712	5.9%

Table 31 - Housing Stock and Vacancy Rates for Kildare 2011 & 2016 (Source: CSO)

Table 32 shows the vacancy rate for the State, Kildare County and other counties within or close to the Eastern-Midland region, and indicates that at 5.9%, Kildare County has a relatively low vacancy rate.

	Total Housing Stock 2016	Vacant Dwellings	Vacancy Rate
State	2003645	245460	12.3%
Kildare	80158	4712	5.9%
Carlow	23274	2162	9.3%
Dún Laoghaire-Rathdown	86962	4788	5.5%
South Dublin	98387	3530	3.6%
Laois	32794	3160	9.6%
Louth	51399	4713	9.2%
Meath	70649	4875	6.9%
Offaly	30740	2884	9.4%
Westmeath	36890	4009	10.9%
Wicklow	54986	4454	8.1%
Tipperary	69106	8502	12.3%

Table 32 - Housing Stock and Vacancy Rates for State, Kildare and other counties, 2016 (Source: CSO)

Figure 19 shows that the highest levels of vacancy are in the Athy MD and the Kildare-Newbridge MD areas, however still remaining below the State average.

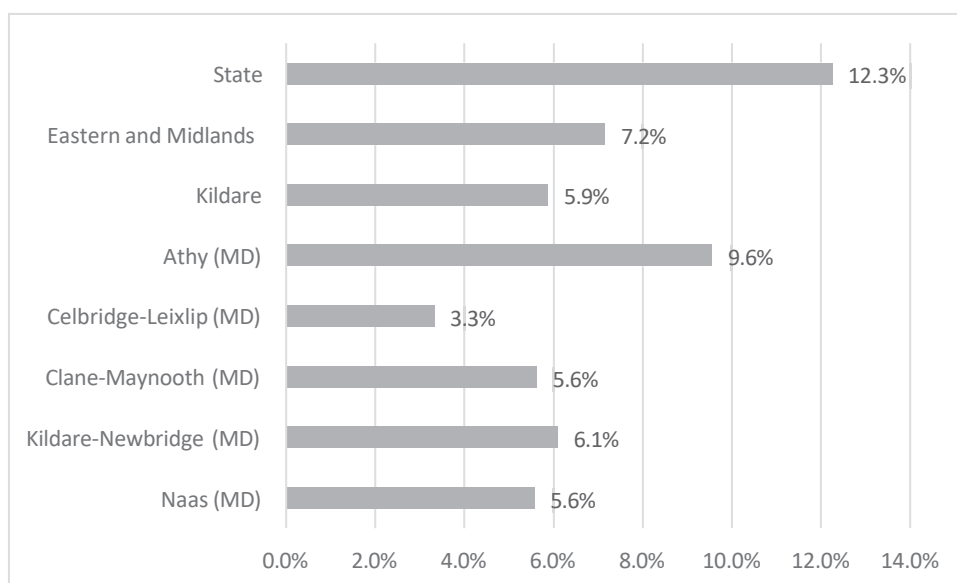


Figure 19 - Vacancy Rates for State, EMRA, County Kildare and MDs, 2016 (Source: CSO)

Table 33 shows the Census 2016 vacancy rate for the main settlements in County Kildare. Athy and Monasterevin have the highest vacancy rates, at 12.6% and 11.1%, respectively. All other towns have moderate rates, noting the low vacancy rates experienced in Leixlip and Celbridge, at 3.0% and 3.4%, respectively.

	Total Housing Stock 2016	Vacant Dwellings	Vacancy Rate
Naas	7726	391	5.1%
Maynooth	5171	230	4.4%
Leixlip	5524	164	3.0%
Newbridge	8260	427	5.2%
Celbridge	6969	239	3.4%
Kilcock	2212	163	7.4%
Kildare	3158	149	4.7%
Monasterevin	1706	189	11.1%
Kilcullen	1401	77	5.5%
Athy	4281	539	12.6%

Table 33 - Housing Stock and Vacancy Rates for main towns in County Kildare (Source: CSO)

Apart from the latest Census figures (2016), locally sourced data on vacancy rates in the private housing stock is not available. Kildare County Council does however employ a Vacant Homes Officer within the Housing Section. The function of this position is to identify vacancy in the private housing stock. Identification is achieved by way of facilitating a vacant homes website, through which members of the public can make Council aware of potentially vacant houses in the county. The inspection by the Vacant Homes Officer and, if necessary, correspondence to the owner, is a proactive step to encouraging refurbishment or sale of vacant houses. A number of vacant houses identified through this process have been successfully CPO'd by Kildare County Council for the purpose of providing housing to persons on the social housing list.

Kildare County Council also encourages uptake of the Government’s Repair and Lease Scheme (RLS), which was initially introduced in February 2018 and noting that in November 2020, the Department for Housing, Local Government and Heritage, announced an increase in the maximum funding available under the scheme from the maximum limit of €40,000 to €60,000. Kildare County Council Housing Authority has advised that there is renewed interest in the scheme since this change was announced. However, as of October 2021, there has been just one property in County Kildare registered under this scheme.

One of the key deliverables under the Government’s Rural Development Policy 2021-2025 is to expand the Town and Village Renewal Scheme as a key enabler to bring vacant and derelict buildings and sites back into use as multi-purpose spaces and for residential occupancy. This would be a significant incentive for addressing vacancy.

4.1.2.2 Obsolescence

New housebuilding in any period is offset by any losses of housing units over that same time, this is referred to as obsolescence. Such losses can take place through dilapidation, through demolition for replacement, or the conversion of houses containing bedsits to single-family homes.

The HNSA centralised repository provides obsolescence rates at a state level and for each county. This has been calculated by taking the change in housing stock in the intercensal period, 2011 – 2016, and subtracting it from the actual number of new dwellings constructed in the same period. In the case of Kildare, the change in housing stock between 2011 and 2016 was + 1,365, whereas the number of new houses constructed in the same period was 1,560. The difference is 196 dwellings or 39 per annum over the 5 years between 2011 and 2016. With a total housing stock of 80,158 dwellings in 2016, the obsolescence rate per annum for County Kildare is 0.05%.

Table 34 below shows how Kildare’s rate of obsolescence compares with the state, the region and other counties. The table shows that at 0.05%, the annual rate of obsolescence for Kildare County is well below average for the state and region.

Rate of Obsolescence per annum 2011-2016	
State	0.20%
EMRA	0.17%
Kildare	0.05%
Meath	0.10%
Laois	0.20%
Louth	0.30%
Wicklow	0.10%
Carlow	0.20%

Table 34 - Annual Rate of Obsolescence, 2011-2016

4.1.2.3 Overcrowding

Overcrowding and hidden households is an important consideration in the projection of household demand going forward. Table 35 shows the households that contain 3 or more usual residents and where the number of residents exceeds the number of rooms by county in 2016.

The figure for overcrowding (unmet demand) as referred to in Appendix 1 to the letter issued by the Minister for Housing, Local Government and Heritage to local authorities on the 18 December 2020 (Structural Housing Demand in Ireland and Housing Supply Targets), and thus pre-programmed into the HNDA Tool, is based on family households who share a house with other persons and also households which comprise unrelated persons and where the ratio of the number of persons usually resident in the house to the number of rooms is greater than 2.0. The number of households is calculated at 178, which equates to an overcrowding rate of 0.4%, compared to a State average of 0.7%. In the absence of locally sourced data on overcrowding, the HNDA will use this Census based figure, and thus this figure has been used for projecting new household demand for the plan period (see Section 3.6.1).

Ratio Greater than 1								
	Less than 0.5	0.5 - 1	1 - 1.5	1.5 - 2	2 - 2.5	2.5 - 3	3 or more	Total
Total	5,462	25,809	6,645	1,300	548	93	115	39,972
Married Couple with children	4,100	18,285	3,735	632	313	59	56	27,180
Cohabiting couple with children	253	2,051	835	192	87	11	15	3,444
One Parent Mother with children	456	1,867	565	140	24	<6	<10	3,062
One Parent Father with children	94	167	52	6	<6	<6	0	322
Married Couple with other persons	184	285	88	31	<6	<6	<6	595
Cohabiting couple with other persons	33	180	76	19	<6	<6	<6	313
Married Couple with children and other persons	68	881	382	94	40	7	6	1,478
Cohabiting couple with children and other persons	10	143	110	15	15	<6	<6	297
One Parent Mother with children and other persons	102	452	160	42	10	<6	<6	771
One Parent Father with children and other persons	20	88	34	<10	<6	<6	<6	154
2 family units with/without other persons	35	594	358	85	33	6	7	1,118
3 or more family units with/without other persons	0	9	9	<6	<6	<6	0	22
Households comprised of related persons only	26	184	82	19	7	<6	<6	323
Households comprised of unrelated persons only	81	623	159	15	<6	<6	11	893

Table 35 - Households that contain 3 or more usual residents and where the number of residents exceeds number of rooms by county, Census 2016

4.1.2.4 Existing Condition of Dwellings

There is no locally available data on the condition of houses. Useful indicators include rates of vacancy and rates of obsolescence, both of which are below the averages of state and region level. Other indicators are year of construction and Building Energy Rating (BER) data.

Table 36 shows the period of construction of the housing stock in Kildare County, as per Census 2016. It indicates that 62% of dwellings were constructed up to the year 2000.

Period in which Built	Number
Before 1919	2938
1919 to 1945	2410
1946 to 1960	3127
1961 to 1970	3739
1971 to 1980	9928
1981 to 1990	8220
1991 to 2000	14904
2001 to 2010	22334
2011 or later	1739
Not stated	4009
TOTAL	73348

Table 36 - *Housing Stock Kildare County, Period of Construction, Census 2016*

The table in Figure 20 has been sourced from the SEAI and indicates the typical BER ratings for houses by age for various fuel types. The data reflects typical building regulations at the time of construction. Cross referencing this data with the data in Table 36 above would suggest that 45,266 dwellings (62% of total housing stock) in County Kildare built up to the year 2000 have a maximum BER rating of C3 and minimum of G. It is acknowledged that a certain proportion of these houses will have been upgraded to a higher BER, including through the availing of home energy grants. Home Energy Grants support home insulation, heating and renewable energy upgrades; they have been administered since 2006. The free energy upgrade scheme funds energy efficiency improvements in the homes of vulnerable people beginning in 2000.

A report titled 'The energy efficiency of Irish homes', prepared by PublicPolicy.ie¹⁷, affiliated through UCD, reports that as of 2018, a total of 8,460 Home Energy Grants and 4,424 Free Energy Upgrades were granted in County Kildare, which totals 12,884 upgrades, equivalent to 17.5% of the occupied housing stock, or 16% of the total housing stock. This potentially means that approx. 32,000 houses in Kildare County continue to have a building energy rating of C3 or lower. A target of the Climate Action Plan 2021 is to complete 500,000 home retrofits to achieve a B2 BER.

¹⁷ The Energy Efficiency of Irish Homes, PublicPolicy.ie
https://publicpolicy.ie/downloads/papers/2019/The_energy_efficiency_of_Irish_homes.pdf

Oil/gas central heating		Standard electric heating		Solid fuel central heating	
Year of construction	Typical energy rating	Year of construction	Typical energy rating	Year of construction	Typical energy rating
2012+	A3	2012+	A3	2012+	A3
2010-2011	B1	2010-2011	B1	2010-2011	B1
2008-2009	B3	2008-2009	C3	2008-2009	B3
2005-2007	C1	2005-2007	D1	2005-2007	C2
1994-2004	C3	1994-2004	E1	1994-2004	D1
1978-1993	D1	1978-1993	E2	1978-1993	D2
Pre 1978	D2/E1/E2	Pre 1978	G	Pre 1978	F

Figure 20 - Typical BER rating for houses by age for various fuel types (Source: SEAI)

4.1.3 Rural Houses

National Policy Objective 20 of the NPF requires Local Authorities to ‘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.’

Analysis of planning permission data from 2010 to Q2 2021, in terms of total units permitted (Table 37) in County Kildare, has been undertaken to assist in projecting the need for single housing in the countryside during the plan period. The data helps to understand typical quantum per annum of one-off houses being permitted in the county and the proportion of overall residential permissions they comprise.

In Table 37, ‘All Dwellings’ refers to multi-unit housing developments, one off houses, private flats and apartments. The table reveals that the total number of permitted units in County Kildare has trended upwards since 2012, peaking at 5,952 units permitted in 2020 (which includes SHDs), corresponding with positive economic growth following a lag period post 2011. The correlation is noted between the growing economy and the downward number of one-off houses as a percentage of overall units granted. The table does show that from 2016 to 2020, the number of permissions for one-off dwellings averages at 175 per annum. 2021 is emerging as an anomaly in the trend across the board, on foot of the Covid-19 pandemic.

Year	One-Off Houses Permitted	All Dwellings Permitted	One-off houses as a % of all dwellings
2010	170	1021	17 %
2011	123	190	65 %
2012	83	122	68 %
2013	78	307	25 %
2014	92	317	29 %
2015	108	459	24 %
2016	175	736	24 %
2017	170	2172	8%

Year	One-Off Houses Permitted	All Dwellings Permitted	One-off houses as a % of all dwellings
2018	189	4761*	4%
2019	161	3260*	5%
2020	186	5952*	3%
2021	78**	919***	8%
	Average annual rate 2010 - Q2 2021		23%
	Average annual rate 2017 - Q2 2021		6%

* Figures include grants of permission under the SHD process

** Up to Q2 2021

Table 37 - Analysis of Permitted Applications for One-Off Houses, Kildare (2010 - Q2 2021) (Source: CSO)

It is acknowledged however that the above 'One-Off Houses' figure, as obtained from the CSO, includes all one-off houses, including those located within urban settlements. As such, this figure is not an accurate reflection of 'rural' one-off houses granted.

The Kildare County Council internal planning application operating system does not have the facility to filter down to a level which differentiates between urban one-off and rural one-off houses. This deficiency has been flagged with the development management team as an item for potential upgrade in the future. However, detailed analysis carried out shows that in 2018, 2019 and 2020, the number of rural one-off houses permitted in County Kildare was 156, 106 and 162, respectively. This analysis involved filtering out all permissions within towns, villages and rural settlements.

As part of the preparation of the rural housing section of the Kildare County Development Plan 2023-2029, AIRO was commissioned to prepare an evidence baseline in respect of rural one-off housing in the period 1999 to Q4 2020. The analysis carried out by AIRO comprised the following methodology:

- For the purposes of the mapping exercise Rural 'One-Off' housing is defined as any housing unit that is outside the 50+ Settlement Areas in the Kildare County Development Plan (CDP) 2017-2023 Variation 1
- Settlements are grouped into the following hierarchy: Key Towns, Self-Sustaining Growth Towns, Self-Sustaining Towns, Towns, Villages and Rural Settlements. All Rural Nodes (28) as also classed as Rural 'One-Off' dwellings
- Boundaries are based on Zoning and LAP layers as provided to AIRO by Kildare County Council (April 2021)
- To identify and analyse the location, distribution and density of Rural 'One-Off' housing in Kildare, AIRO undertook an analysis of GeoDirectory - Ireland official address database.
- Analysis was based on GeoDirectory Extract Q4 2020
- All Address Points either 'Residential' or 'Both' (residential and commercial) were included
- Under-Construction and Derelict buildings were excluded
- The database contained a listing of all residential properties in Ireland and also included a 'Create Date' field that provided an accurate time-stamp as to when the property was built
- Note: There may have been a certain time-lag between the official 'planning approval' date from Kildare County Council and the GeoDirectory 'Create Date' and as such a year-by-year analysis was not recommended.

The results of the analysis are shown in Table 38. The table indicates that the number of residential units in County Kildare increased by 39,810 in the period 1999 to end of year 2015, of which rural one-off houses (8,703) accounted for 21.8%. And in the period 2016 to end of year 2020, the number of residential units in County Kildare increased by 6,176, of which rural one-off houses (892) accounted for 14.4%.

	Total Residential Units	Rural One-Off Houses	Rural One-Offs as % of Total	Rural One-Offs as % of Increase
1999	40827	10428	25.5%	
1999 - Q4 2015	80637 (+39,810)	19131 (+8,703)	23.7%	21.8%
2016 - Q4 2020	86813 (+6,176)	20023 (+892)	23.1%	14.4%

Table 38 - Analysis of rural one-off houses in County Kildare (1999 – Q4 2020) (Source: AIRO)

It is acknowledged that the presence of new rural one-off dwellings between the period 2016 to end of year 2020 does not correlate directly with permissions granted in the same year for the reason of time lag between grants of permission and commencement of development, however it is a good indication of true demand. An additional 892 rural one-off houses constructed between 2016 and end of year 2020 equates generally to 178 houses per annum. Figures contained in Table 37 (Permitted Applications for One-Off Houses) indicates that between 2016 and 2020, an average of 176 one-off houses were permitted. While the CSO figure on permitted units includes urban areas, and considering the time lag for commencement, it is still considered a parallel source to gauge rural-one offs. As described above, a detailed analysis of planning permissions granted shows that in 2020, 162 permitted dwellings were in the rural areas outside of towns, villages, rural settlements and rural nodes.

4.2 Housing Supply

4.2.1 House Completions

Figure 21 and Table 39 illustrate how completed units have increased since 2011 with a high of 1,898 units being completed in 2019. In the period 2016 to Q2 2021, 7,214 new dwelling units have been constructed, of which 12.6% are single houses, 83.6% scheme houses (detached, semi-detached, terraced houses), and 3.8% apartments. Covid-19 related restrictions impacted 2020 house supply, however completions have surged in Q1 and Q2 2021, on track to surpass 2018 and 2019 levels.

Figure 21 and Table 39 show the breakdown in delivery of dwelling types in County Kildare in the period 2011 to Q2 2021. Houses in estates are the prevalent dwelling type, having surged since 2014. Table 40 shows the same break down in delivery of dwelling types across the State. This table demonstrates, relative to the State average, the consistently low delivery rates of apartment units in County Kildare. Since 2012, 3.6% of dwelling unit completions in County Kildare were apartments, compared to the State average of 14%.

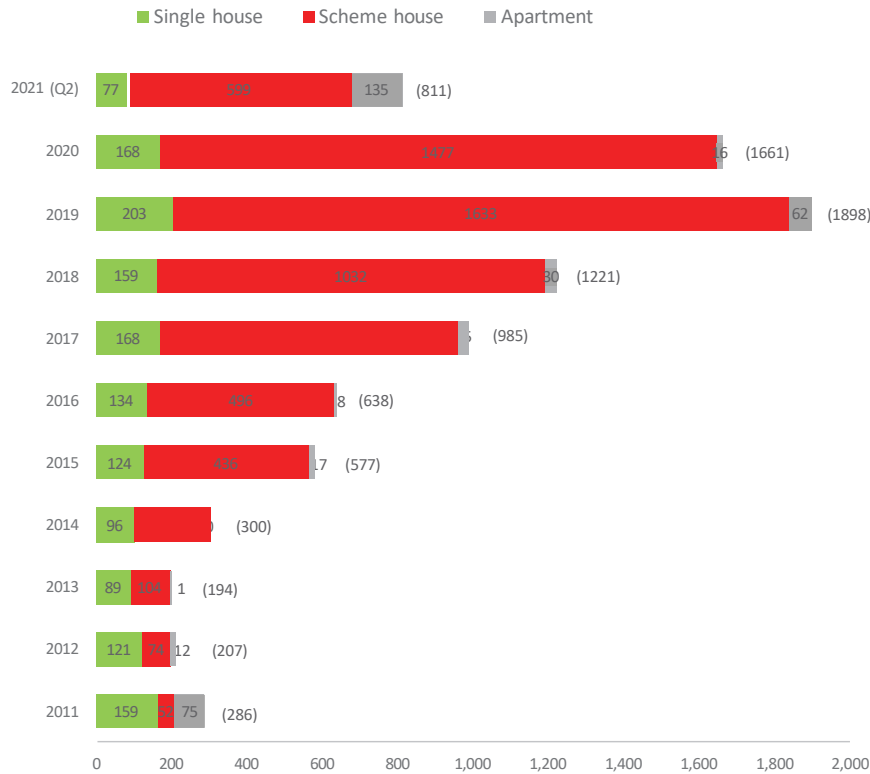


Figure 21 - New Dwelling Completions in Kildare 2011-2021 (Q2) (Source: CSO)

	Single House	Scheme House	Apartment	Total	Single House as % of Total	Apartments as % of Total
2011	159	52	75	286	55.6%	26.2%
2012	121	74	12	207	58.5%	5.8%
2013	89	104	1	194	45.9%	0.5%
2014	96	204	0	300	32.0%	0.0%
2015	124	436	17	577	21.5%	2.9%
2016	134	496	8	638	21.0%	1.3%
2017	168	792	25	985	17.1%	2.5%
2018	159	1032	30	1221	13.0%	2.5%
2019	203	1633	62	1898	10.7%	3.3%
2020	168	1477	16	1661	10.1%	1.0%
2021	77	599	135	811	9.5%	16.6%

Table 39 - New Dwelling Completions in Kildare 2011-2021 (Q2) (Source: CSO)

	Single House	Scheme House	Apartment	Total	Single House as % of Total	Apartments as % of Total
2011	4814	1358	822	6994	68.8%	11.8%
2012	3501	964	446	4911	71.3%	9.1%
2013	2947	1155	473	4575	64.4%	10.3%
2014	2975	1795	748	5518	53.9%	13.6%
2015	3252	3294	673	7219	45.0%	9.3%
2016	3644	5060	1157	9861	37.0%	11.7%
2017	4247	7880	2211	14338	29.6%	15.4%
2018	4678	10971	2258	17907	26.1%	12.6%
2019	5061	12512	3495	21068	24.0%	16.6%
2020	4945	11665	3922	20532	24.1%	19.1%
2021	2115	4804	1999	8918	23.7%	22.4%

Table 40 - New Dwelling Completions in the State 2011-2021 (Q2) (Source: CSO)

Represented in Figure 22, completion figures in Kildare for 2020 indicate the highest levels of completion were in the Naas and Maynooth local electoral areas. CSO data on dwelling completions show that for Q3 2020, Naas LEA had the highest number of dwelling completions (160) compared to all LEAs in the State.

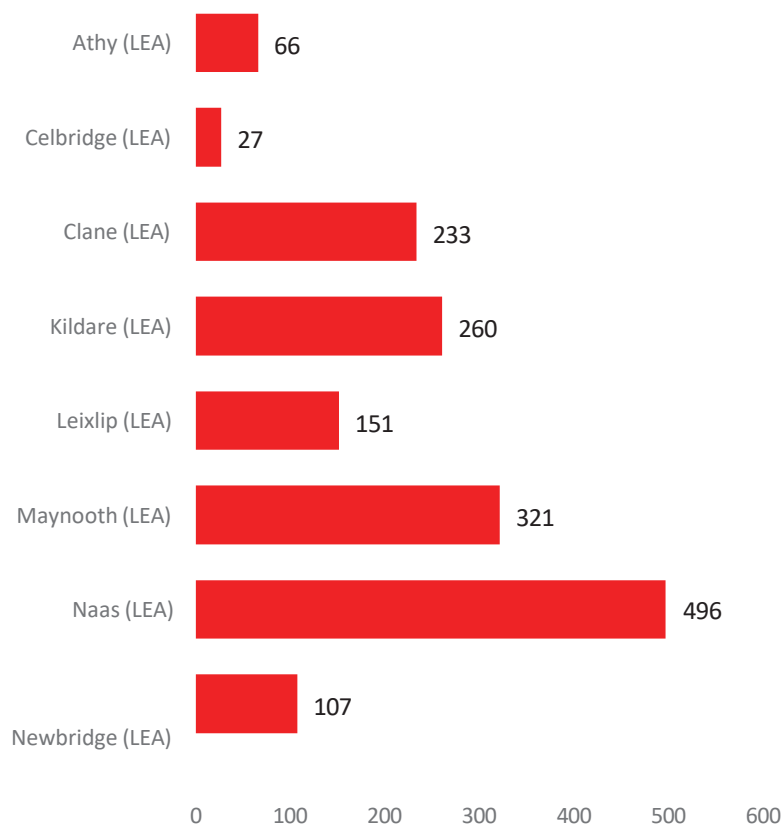


Figure 22 - New Dwelling Completions in Kildare by LEA, 2020 (Source: CSO)

4.2.2 House Commencements

Kildare County Council maintains a register of all commencements throughout the county. Analysis of data shows that in the 12 months to 30 September 2021, a total of 2,843 new dwellings were commenced, compared to 1,559 in the 12 months to 30 September 2020. This gives a total of 4,402 dwelling units commenced since September 2019.

4.2.3 Unfinished Housing Estates

The 2017 National Housing Development Survey¹⁸ which tracks progress on unfinished housing developments since 2010 indicates there were 10 unfinished housing developments in County Kildare in 2017.

In addition to, but separate from, the 2017 National Housing Development Survey, Kildare County Council maintains a register of all residential estates throughout the county which are finished, unfinished and under construction and monitors their progress.

Following recent inspections of the 10 estates identified on the 2017 National Housing Development Survey, ongoing construction activity was noted on three of the developments, all units are complete in three developments, one of which has been taken in charge and four developments remain unfinished. Out of the four remaining unfinished housing estates, construction activity is ongoing on three sites and no activity on one site. The four unfinished housing estates comprise a total of 239 approved dwelling units (219 houses and 20 apartments / duplex units). A total of 55 dwelling units (23%) are complete and occupied, with the remaining 184 units unfinished.

4.2.4 Planning Permissions

4.2.4.1 Planning permissions

Table 41 indicates the number of granted planning applications and associated number of new dwellings in County Kildare from 2018 to Q2 2021. In that period, planning permission was granted for 8,977 units (multi-development houses and apartments).

Granted Applications	2018		2019		2020		Q1 and Q2 2021	
	No. of Grants	No. of Dwellings	No. of Grants	No. of Dwellings	No. of Grants	No. of Dwellings	No. of Grants	No. of Dwellings
Multi development houses	31	2151	47	1406	48	1970	5	359
One-off houses	189	189	161	161	186	186	34	78
Private flats/apartments	38	885	50	576	48	1290	6	340
TOTAL	258	3225	258	2143	282	3446	45	777

Table 41 - Granted Planning Permission in County Kildare by Unit Type 2018 to Q1 2021 (Source: CSO)

¹⁸ 2017 National Housing Development Survey

https://data.gov.ie/en_GB/dataset/unfinished-housing-survey-2017/resource/f8515d15-a7a1-4dd7-957e-915fb4397201

4.2.4.2 Strategic Housing Developments

Strategic Housing Developments (SHD) are applications that go directly to An Bord Pleanála for decision. These decisions cannot be appealed. SHD is defined under Section 3 of the Planning and Development (Housing) and Residential Tenancies Act 2016 as:

- (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 that includes developments of the type referred to in paragraph (a) and of the type referred to in paragraph (b), or containing a mix of houses and student accommodation or 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).*

On the 13 July 2021, the Government announced the termination and replacement of Strategic Housing Development (SHDs) planning arrangements. New streamlined arrangements for large-scale residential developments (LSRDs) which restore decision-making to local authorities will be introduced to replace SHDs.

In Circular Letter PL 10/2021, dated 15 October 2021, the Department of Housing, Heritage and Local Government advised that pending the enactment of the Planning and Development (Large Residential Development - LRD) Bill 2021, the existing SHD arrangements remain in force.

Kildare County Council maintains a register of all SHDs processed for County Kildare. Table 42 shows the number of dwellings (houses and apartments) granted under the SHD process in County Kildare between 2018 and 2020. It also gives an idea of the spatial distribution of SHDs across the county. The table indicates that a total of 5,159 dwellings were permitted under the SHD process in County Kildare in the three years 2018 to 2020, of which 37% were apartments. Table 43 shows SHDs granted as of 31st October 2021, for 2021 (142 no.) and also those currently with An Bord Pleanála, with a decision pending (1,224 no.). On a settlement level, Celbridge has the highest number of dwellings permitted under the SHD process to date, at 1,090, followed by Clane at 699 and Leixlip at 689. A review of the BCMS register shows that out of the 6,383 dwellings permitted under the SHD process to date, a total of 2,371 dwellings, or 37%, have commenced.

	Newbridge		Kildare		Naas		Kill		Clane	
Granted	Houses	Apts	Houses	Apts	Houses	Apts	Houses	Apts	Houses	Apts
2018	397	227								
2019			185	190	97	28			184	182
2020					206	230	254	60	189	144
Total	397	227	185	190	303	258	254	60	373	326

	Maynooth		Kilcock		Leixlip		Celbridge		
Granted	Houses	Apts	Houses	Apts	Houses	Apts	Houses	Apts	Total
2018	320	142			392	58			1536
2019							167	84	1117
2020			251	94	136	103	469	370	2506
Total	320	142	251	94	528	161	636	454	5159

Table 42 - Granted SHDs in County Kildare 2018 to 2020 (Source: CSO and Kildare County County)

	Newbridge		Clane		Maynooth		Kilcock		
2021	Houses	Apts	Houses	Apts	Houses	Apts	Houses	Apts	Total
Granted			114	28					142
Pending	343	197	114	78	119	75	180	118	1224

Table 43 - SHDs lodged in County Kildare in 2021 (Source: Kildare County County)

4.2.4.3 Non-SHDs and SHDs

CSO data reports on planning permissions at a county level do not record permissions granted under the SHD process. Table 44 combines both sets of figures, noting that SHDs comprise, by their nature, multi development housing units and apartments, as such the figure for one-off houses in Table 44 does not change. It should also be noted that a large proportion of one-off house comprise single houses in the countryside.

	2018		2019		2020		2021 (Q1 and Q2)	
	Non-SHD	SHD	Non-SHD	SHD	Non-SHD	SHD	Non-SHD	SHD
Multi development house units	2151	1109	1406	633	1970	1505	359	114
One-off houses	189	-	161	-	186	-	78	-
Private flats/apartments	885	427	576	484	1290	1001	340	28
Subtotal	3225	1536	2143	1117	3446	2506	777	142
TOTAL	4761		3260		5952		919	

Table 44 - Combined figures for SHDs and Non-SHDs in County Kildare, 2018-2021 (Q1 and Q2) (Source: CSO and Kildare County County)

4.3 Local Authority Housing Stock

Kildare County Council had a housing stock of 5,436 dwelling units, as of October 2021, the breakdown and distribution of which is presented in Table 45. The table shows that at a county level the housing stock comprises mostly 3 bed units (61%), followed by 2 bed units (19.4%) and 1 bed units (11.9%). This percentage distribution is generally similar across the MDs, except for Celbridge-Leixlip where 2 beds account for a larger proportion of stock, at 25.6%, whereas proportionately there are lesser 1 beds, at 6.7%.

	1 bed	2 bed	3 bed	4 bed	5 bed	6 bed	Not stated	Total
County Kildare	647	1060	3318	331	15	2	63	5436
% of total	11.9%	19.5%	61.0%	6.1%	0.3%	0.0%	1.2%	
Athy MD	124	179	606	47	6	0	12	974
% of total	12.7%	18.4%	62.2%	4.8%	0.6%	0.0%	1.2%	
Kildare-Newbridge MD	223	302	1114	131	4	0	12	1786
% of total	12.5%	16.9%	62.4%	7.3%	0.2%	0.0%	0.7%	
Naas MD	115	163	518	43	4	1	3	847
% of total	13.6%	19.2%	61.2%	5.1%	0.5%	0.1%	0.4%	
Clane-Maynooth MD	146	266	739	81	1	1	9	1243
% of total	11.7%	21.4%	59.5%	6.5%	0.1%	0.1%	0.7%	
Celbridge-Leixlip MD	39	150	341	29	0	0	27	586
% of total	6.7%	25.6%	58.2%	4.9%	0.0%	0.0%	4.6%	

Table 45 - Kildare County Council housing stock (as of October 2021)

In addition to the Council's own housing stock, further social housing and social housing support is provided by way of Approved Housing Bodies, Housing Assistance Payment (HAP), leased properties, including the Rental Accommodation Scheme (RAS); all of which are supported under the Social Housing Current Expenditure Programme (SHCEP). Table 46 shows the current figures for all avenues of social housing support in County Kildare.

Housing Stock (directly owned by Kildare County Council)	5436
Leased by Kildare County Council	218
Approved Housing Body (AHB) Units	2165 ¹⁹
Rental Accommodation Scheme (RAS)	422 ²⁰
Housing Assistance Payment (HAP) Units	2272 ²¹

Table 46 - Social Housing support in County Kildare (as of October 2021)

¹⁹ 2020 Annual Report & Sectoral Analysis - The Regulation of Approved Housing Bodies in Ireland (Housing Agency Regulation Office)

<https://www.housingagency.ie/sites/default/files/2021-07/Regulation%20Annual%20Report%202020%20FINAL.pdf>

Overview of Social Housing Activity 2020 and 2021 (Q1 and Q2) published by the Dept. of Housing Local Government and Heritage

<http://www.housing.old.gov.ie/housing/social-housing/social-and-affordble/overall-social-housing-provision>

²⁰ RAS Tenancies 2021 Quarterly Statistics published by the Dept. of Housing Local Government and Heritage

<http://www.housing.old.gov.ie/housing/social-housing/social-and-affordble/overall-social-housing-provision>

²¹ Kildare County Council, Housing Section (figure as of 30th September 2021)

4.3.1 Housing Stock Issues (Local Authority Housing)

4.3.1.1 Vacancy

Census 2016 recorded a vacancy rate for County Kildare of 5.9%, down from 8% in 2011. Referring to Table 467, data available from Kildare County Council's Housing Section shows that the vacancy rate for the local authority housing stock is 4.03% (as of October 2021), with a high of 5.67% in Naas MD and a low of 1.88% in Celbridge-Leixlip MD.

Most vacant units are in varying stages of being re-let; with maintenance, under offer, accepted, refused. There are no long-term vacancies. A vacancy rate of 4.03% for Kildare County Council's own housing stock is relatively low compared to the 2016 Census rate of 5.9% for the County and 8% for the State (all housing stock including private housing).

Vacancy	Total Housing Stock	Vacant	% of Total
Athy MD	974	43	4.41%
Kildare-Newbridge MD	1786	70	3.92%
Naas MD	847	48	5.67%
Clane-Maynooth MD	1243	47	3.78%
Celbridge-Leixlip MD	586	11	1.88%
County	5436	219	4.03%

Table 47 - Vacancy rates of Kildare County Council housing stock

4.3.1.2 Obsolescence

There is no current data on a rate of obsolescence within the local authority housing stock. As aforementioned, the annual rate of obsolescence for Kildare County, at 0.05%, is well below average for the state and region.

4.3.1.3 Overcrowding

There is no precise data on overcrowding recorded by Kildare County Council for its own housing stock. There is however policy that where an issue of overcrowding does arise, the issue is addressed through a transfer to alternative accommodation.

4.3.1.4 Stock Management, Upgrade or Renovation

Housing Maintenance / Stock Condition

119 properties turned around to date in 2021 of which 47 were new house purchases and 72 are existing Kildare County Council stock. Work to 125 units is ongoing.

The Department of Housing, Local Government and Heritage and local authorities supported by the Local Government Management Agency (LGMA) are currently working to transition from a largely response and voids-based approach to housing stock management and maintenance to a planned maintenance approach as referenced in Housing for All, policy objective 20.6. This will require the implementation of centrally hosted ICT system within the LGMA to support the completion of stock condition surveys by all local authorities and the subsequent development of strategic and informed work programmes which will be supported by stock improvement funding programmes provided by Department of Housing, Local Government and Heritage. It is envisaged that stock condition surveys will commence early in 2022.

Retrofit Projects

Kildare County Council are participating in two climate action schemes, as follows:

1. The Midlands Energy Efficiency Retrofit Programme and
2. The 2021 Energy Efficiency Retrofit Programme.

Kildare County Council has been allocated €4.78m under both these schemes with a target of retrofitting 175 No units. The works generally consist of upgrading of heating systems and controls, ventilation upgrades and sealing of chimneys. Kildare County Council expect to complete 60 Units by Q4 2021(€1.64m spend) and 125 Units Q2 2022 (€3.15m spend).

Table 48 outlines the current energy retrofit projects as of 12th November 2021.

Location	No. of Units
Beechgrove, Rathangan	14 Units
Ashgrove, Derrinturn	21 Units
Bishopsland, Kildare	38 Units
St Evin's Park, Mionasterevin	15 Units
Cill Corban, Naas	10 Units
Clonmullion, Athy	14 Units
Loughnamona, Leixlip	39 Units
Vacants	24 Units
Total	175 Units

Table 48 - *Current energy retrofit projects (as of 12th November 2021)*

Regeneration Projects

Kildare County Council are involved in an ongoing regeneration project in St. Patrick's Park, Rathangan. The current phase 2 of this project consists of the demolition of 15 units, refurbishment of 25 units, construction of 7 new units and overall improvements to public realm.

Self Help Grant 2021

The objective of this scheme is to assist Local Authority tenants to carry out improvement works on their home and can be used to replace defective windows and doors, defective kitchen units, heating systems, stoves or for other minor works.

In Kildare County Council, the self-help grant is administered through the housing maintenance section. Recent uptake was recorded at 80 grants offered in 2020 and 87 grants offered to date in 2021.

4.4 Social Housing Provision

The Council, in line with the policies set down in the Policy Document "Delivering Homes – Sustaining Communities" published by the Department of the Environment in 2007, continues to provide a wide range of housing services throughout the County. In addition to the Council's own stock, social housing in Kildare is currently being provided through a number of schemes and actions as set out below.

4.4.1 Social Housing Capital Investment Programme

The construction of social housing units through the build programme by local authorities is funded by the Social Housing Capital Investment Programme (SHCIP or SHIP) managed centrally by Department of Housing, Local Government and Heritage.

Given the short supply of land owned by Kildare County Council, an element of this SHIP programme favoured by Kildare County Council is 'Turnkey Construction', under which the local authority adds to its stock of social housing by contracting developers to deliver new social housing on privately owned land, based on existing designs and planning permissions.

4.4.2 Part V Social and Affordable Housing

The Affordable Housing Act 2021 has amended Section 94 (4)(a) of the Planning and Development Act 2000 to read as follows:

A housing strategy shall include an estimate of the amount of -

- (i) housing for the purposes of the provision of social housing support within the meaning of the Housing (Miscellaneous Provisions) Act 2009,*
- (ii) housing for eligible applicants within the meaning of Part 2 of the Affordable Housing Act 2021, and*
- (iii) cost rental housing,*

required in the area of the development plan during the period of the development plan and the estimate may state the different requirements for different areas within the area of the development plan.

Furthermore, Section 94 (4)(c) of the Planning and Development Act 2000, also amended by the Affordable Housing Act 2021, reads as follows

*(c) Subject to paragraph (d), a housing strategy shall provide that as a general policy a specified percentage, not being more than **20 per cent**, of –*

- (i) the land zoned for residential use, or for a mixture of residential and other uses, and*
- (ii) any land which is not zoned for residential use, or for a mixture of residential and other uses, but in respect of which permission for the development of houses is granted,*

shall be reserved under this Part for the provision of housing for the purposes of one or more of subparagraphs (i), (ii) and (iii) of paragraph (a).

(d) Paragraph (c) shall not operate to prevent any person (including a local authority) from using more than 20 per cent of land in respect of which permission for the development of houses is granted for the provision of housing to which paragraph (a) applies.

In summary, any new planning permissions for housing development on such lands will have a 20% Part V requirement, for which

- At least half of the Part V provision must be used for social housing support
- The remainder can be used for affordable housing, which can be affordable purchase, cost rental or both.

These changes to Part V primarily apply to land purchased on or after 1 August 2021.

4.4.3 Enhanced Long-Term Leasing

The Department of Housing, Planning and Local Government introduced the Enhanced Long Term Social Housing Leasing scheme in 2019 order to:

- Ramp-up the scale of delivery under the leasing delivery mechanism
- Target newly built or yet to be built houses and apartments for leasing to minimise competition with existing housing stock
- Target property developers and investors who are in a position to deliver housing at a reasonable scale, and
- Provide for lease terms that require the property owner to provide day to day maintenance of the properties under a schedule of Management Services. The expanded scope of requirements to be performed by the property owner will be compensated by an increase in the proportion of the market rent payable under the enhanced lease to a maximum of 95%.

The Scheme is available to property owners who can deliver properties at scale and provide the requisite property maintenance services under the terms of the lease. It is in addition to existing long-term leasing arrangements that continue to be available and are an option for property owners who wish to lease properties to local authorities without the relevant property maintenance services.

Under the Government's Housing for All, 2021, new enhanced / long-term leases will be phased out by the end of 2023. The Council has received social leasing targets to the end of 2023, thereafter, no further leased units will be provided.

However, the Repair and Lease Scheme, outlined below, is still available to Kildare County Council and is an important tool to addressing vacant houses in towns and villages.

4.4.4 Repair and Leasing Scheme

The Repair and Leasing Scheme (RLS) has been developed under Action 5.7 of Rebuilding Ireland to assist private property owners, local authorities and Approved Housing Bodies (AHBs) in utilising existing vacant housing stock throughout the country that has the potential to deliver significant social housing delivery in the coming years. The scheme is targeted at owners of vacant properties who cannot afford or access the funding needed to bring their properties up to the required standard for rental property. In County Kildare, there has been just one property registered under this scheme, as of October 2021. However, in November 2020, the Department for Housing, Local Government and Heritage, announced an increase in the maximum funding available under the Repair and Leasing Scheme (RLS) from the current limit of €40,000 to a maximum of €60,000. Kildare County Council Housing Authority has advised that there is renewed interest in the scheme since this change was announced.

4.4.5 Approved Housing Bodies (AHBs)

AHBs 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

Capital Assistance Scheme

The Capital Assistance Scheme (CAS) funding provides loans to AHBs to deliver housing for older people, homeless, and people with a disability or victims of domestic violence. Loans of up to 100% of the overall approved capital cost of eligible projects are available, subject to CAS scheme conditions. The loans are protected by a mortgage and are non-repayable provided the accommodation continues to be let to eligible categories of persons, and are adequately maintained. During the period 2016-2018 expenditure on the CAS has more than doubled from €37m in 2016 to almost €81m in 2018.

Capital Advance Leasing Facility

The Capital Advance Leasing Facility (CALF) provides financial support to AHBs in the form of a long-term loan to assist with the financing of the acquisition, construction or refurbishment of units that will be provided for social housing use. This loan facility can support up to 30% of the eligible capital cost of the project, where the units will be provided by the AHB under long-term lease arrangements (known as Payment and Availability Agreements and funded by the Social Housing Current Expenditure Programme (SHCEP)) to local authorities for social housing use. The main funding requirements are sourced by the AHB through private finance arrangements with the Housing Finance Agency (HFA) or other sources. The demand for and suitability of the properties for social housing must be confirmed by the housing authority. Capital advanced by the Department through the housing authority will be repayable at the end of the Payment and Availability Agreement plus accrued interest. While CALF funding also supports the acquisitions delivery mechanism, any reference in this note relates only to its assistance to the AHB in constructing new build units.

4.4.6 Land Aggregation Scheme

The Land Aggregation Scheme (LAGS) was introduced in 2010 as part of revised arrangements for the funding of land for social and affordable housing purposes. The primary purpose of the Scheme was to assist in the gradual unwinding of loans taken out by housing authorities to purchase such lands.

The local authority loans on these sites have been (or are being) redeemed by the Exchequer and the sites are owned and controlled by the Housing Agency. LAGS lands, comprising 73 sites, transferred to the Housing Agency have a total area of 243 hectares with a total housing capacity of approximately 5,300 homes. Some of the sites will be suitable for social housing only while some of the larger sites can contribute to other tenures of housing delivery.

Based on location, economic and demographic factors, the sites are divided into two classifications, namely 'Sites for Immediate Development' and 'Secondary Sites'. Details of 'Sites for Immediate Development' in County Kildare are set out in Table 49 below.

Site	Area (ha)	Potential Units	Progress
Devoy Barracks, Naas	5.66	142	Land Development Agency application for 221 units refused by An Bord Pleanála in July 2021
Craddockstown, Naas	7.93	180 (50% of site for social / affordable housing)	74 units constructed (Public Private Partnership)
Butterstream, Clane	8.49	160 (50% of site for social / affordable housing)	77 units under construction (as of Q1 2019) (Public Private Partnership) Also referenced in Table 51 in Section 4.5 below.

Table 49 - 'Sites for Immediate Development' as classified under the Land Aggregation Scheme

4.4.7 Social Housing Accommodation Supports

The Social Housing Leasing Initiative (SHLI) and Rental Accommodation Scheme (RAS) provide an additional source of rented accommodation for eligible persons through the private rental market. The statutory basis for the (long-term leasing schemes) and the RAS is provided for within the Housing (Miscellaneous Provisions) Act, 2009. There are two options for property owners who are considering making their properties available to a local authority or approved housing body:

- Long-term lease arrangements (10-20 years)
- Shorter-term rental arrangements (typically 1-10 years)

The Housing Assistance Payment (HAP) is available to approved housing applicants, who must find their own private rented accommodation (within specific rent caps). The Local Authority will pay the landlord directly and the tenant will pay a rent to the local authority based on the differential rent scheme. The rent is based on weekly household income.

Kildare County Council delivers social housing by leasing houses and apartments from private owners and allocating them to tenants from the social housing list.

Leased properties can be sourced from a range of different sources - including direct leasing by local authorities and Approved Housing Bodies, the Mortgage to Rent Scheme, the Repair and Leasing Scheme (RLS) and the newer Enhanced Leasing Scheme - and have the potential to provide faster and more flexible delivery than traditional delivery methods. Of the 50,000 social homes to be delivered under Rebuilding Ireland out to 2021, over 10,000 will be leased by AHBs and LAs.

4.4.7.1 Housing Assistance Payment (HAP)

HAP is a form of social housing support and the scheme is operated by local authorities. Under the HAP scheme, monthly payments are made directly to landlords on behalf of the HAP recipient in respect of rent, subject to the conditions of the scheme. HAP recipients are responsible for finding their own accommodation in the private rented sector. Table 50 shows the number of HAP tenancies in County Kildare as of 30th September 2021, with the highest proportion attributed to the Kildare-Newbridge MD, at 36%.

	Current HAP Tenancies	%
Athy MD	444	20%
Celbridge-Leixlip MD	255	11%
Kildare-Newbridge MD	823	36%
Naas MD	373	16%
Clane-Maynooth MD	377	17%
Total	2272	

Table 50 - HAP Tenancies, County Kildare, as of 30th September 2021 (Source: Kildare County Council)

According to statistics published by the CSO²², in 2019, HAP and Rent Supplement properties represented 28.6% of all rental properties in County Kildare registered with the Residential Tenancies Board (RTB).

Under Budget 2022, funding for the Housing Assistance Payment (HAP) scheme is increased by €168 million in 2022 to provide for 14,000 new HAP tenancies (bringing the total number of tenancies supported to 66,000). The Dept. has not provided any information in terms of allocations (as of 1st December 2021).

4.4.7.2 Rental Accommodation Scheme (RAS)

The RAS scheme is a social housing support for persons who are in receipt of long-term rent supplement. The RAS scheme is run by local authorities.

Under Budget 2022, funding of €133 million for the Rental Accommodation Scheme (RAS) will support a further 800 households in 2022, along with the ongoing cost of supporting 17,000 households already in the scheme. However, Kildare County Council is continuing to phase out the use of the RAS scheme and does not anticipate taking on any new properties under this scheme in 2022.

4.5 Social Housing Projects

Kildare County Council will continue to meet social housing needs via a combination of these existing delivery schemes as set out above and through the introduction or greater emphasis of other existing or recently established schemes and mechanisms. This section assesses progress to date in County Kildare in achieving recent targets for social housing delivery as set out in the Rebuilding Ireland: Action Plan for Housing and Homelessness (replaced in September 2021 by *Housing for All – A New Housing Plan for Ireland (2021)*).

Rebuilding Ireland was an initiative by the Government to tackle the housing crisis and to deliver new homes. Its five pillars included Pillar 2 ‘Accelerate Social Housing’, aiming to increase social housing provision through a range of delivery mechanisms, including direct delivery of new homes by local authorities and Approved Housing Bodies, acquisition and leasing of new homes, and the use of the Housing Assistance Payment (HAP) Scheme and Rental Accommodation Scheme (RAS). Rebuilding Ireland set out ambitious targets for each local authority. The most recent year for which delivery against local authority targets is available is 2019. County Kildare had a target of 1,269 social units across all housing outputs and delivered 1,453 social units²³, equating to 14% above the target. The figure of 1,453 units comprised new build (31%), local authority acquisitions (17%) and HAP (47%).

²² CSO Statbank HAP12

²³ Local Authority Social Housing Activity 2019

Table 51 provides data, supplied by Kildare County Council housing authority, on social / affordable housing projects which are currently at various stages under respective funding programmes. The table shows that there are 1,444 social housing units in the pipeline for County Kildare, all expected to be delivered within the next two years. Of the 1,444 units, 537 are under construction, with the remainder at an advanced stage of funding approval.

In addition to those 1,444 units, Table 52 shows a further 596 social housing units that are at a 'Proposal' stage. Table 53 examines both sets of figures together and shows a high volume of social housing units on stream for the Naas MD (663 units or 32.5% of all proposed units), with the Celbridge-Leixlip MD also performing well with a total of 494 units (24.2% of all proposed units) in the pipeline, noting that 50% of those social units in the pipeline for Celbridge-Leixlip MD are to be 'leased' properties. On the other end of the scale, Table 53 shows that there is a total of 176 units (8.7% of all proposed units) in the pipeline for Athy.

	Athy MD	Kildare- Newbridge MD	Naas MD	Clane- Maynooth MD	Celbridge- Leixlip MD	Total
SHIP²⁴ Construction Turnkey	9	9	0	28	49	95
CAS²⁵ (AHBs)	55	27	40	80	97	299
CALF²⁶ (AHBs)	55	101	182	84	20	442
PPP²⁷	0	0	0	77	0	77
Part V	17	15	17	27	65	141
Leasing²⁸	38	116	165	10	61	390
Total	174	268	404	306	292	1444

Table 51 - Social housing projects under construction / advance stage of funding approval for County Kildare

	Athy MD	Kildare- Newbridge MD	Naas MD	Clane- Maynooth MD	Celbridge- Leixlip MD	Total
SHIP Construction Turnkey	0	0	0	0	0	0
CAS (AHBs)	2	28	77	0	0	107
CALF (AHBs)	0	7	104	82	24	217
PPP	0	0	0	0	0	0
Part V	0	0	0	2	0	2
Leasing	0	0	78	14	178	270
Total	2	35	259	98	202	596

Table 52 - Social housing projects at 'Proposal' stage for County Kildare

²⁴ Social Housing Capital Investment Programme (SHCIP or SHIP)

²⁵ Capital Assistance Scheme (CAS)

²⁶ Capital Advanced Leasing Facility (CALF)

²⁷ Public Private Partnership (PPP)

²⁸ Enhanced Leasing (25-year term)

	Athy MD	Kildare- Newbridge MD	Naas MD	Clane- Maynooth MD	Celbridge- Leixlip MD	Total
SHIP Construction Turnkey	9	9	0	28	49	95
CAS (AHBs)	57	55	117	80	97	406
CALF (AHBs)	55	108	286	166	44	659
PPP	0	0	0	77	0	77
Part V	17	15	17	29	65	143
Leasing	38	116	243	24	239	660
Total	176 (8.7%)	303 (14.8%)	663 (32.5%)	404 (19.8%)	494 (24.2%)	2040

Table 53 - All Social housing projects in the pipeline for County Kildare

4.6 Social Housing Trends

Social housing is defined as housing provided by the local authority or an Approved Housing Body, to people who cannot afford housing from their own resources.

4.6.1 Social Housing Need

The Kildare HAP came into effect in 2015 and provides housing assistance for households who qualify for social housing support, including many long-term Rent Supplement recipients. To qualify for HAP, a household must qualify for social housing support, and qualify to go on the local authority housing waiting list. Since HAP was introduced, social housing demand is represented in terms of those in need of social accommodation, and those in the HAP scheme, who have secured accommodation in private sector rented accommodation. Table 54 shows the number of households on the County Kildare Housing List in the year 2016 to 2020. There were 3,104 households²⁹ on the Kildare County Council Social Housing List in 2020 (recorded on the 2 November 2020)³⁰, a decrease of 8.1% over 2019 figure.

Year	Number of Households	% Change
2016	5572	-
2017	5103	-8.4%
2018	3962	-22.4%
2019	3386	-14.5%
2020	3104	-8.3%

Table 54 - Number of Households Qualified for Social Housing Support, County Kildare
(Source: SSHA annual reports)

²⁹ These figures exclude those on the RAS and HAP Programmes.

³⁰ Housing Agency, Summary of Social Housing Assessments 2020

<https://www.housingagency.ie/sites/default/files/2021-03/SSHA-2020.pdf>

The total social housing figures for 2021 were also examined to assess the most up-to-date situation in terms of social housing. It was found that the total number of social housing applicants, as of 2 November 2021, was 3,417 (households). This figure excludes households currently on the Housing Assistance Payment (HAP) scheme, accommodation provided under the Rental Accommodation Scheme (RAS), and accommodation provided under the Social Housing Capital Expenditure Programme (SHCEP) schemes.

4.6.2 Breakdown of Social Housing Need

The Summary of Social Housing Assessments 2020, produced by the Housing Agency is a point-in-time assessment of the identified need for social housing support across the country and brings together information provided by local authorities on households in their functional area that are qualified for social housing support but whose social housing need is not currently being met. Therefore, households currently living in local authority rented accommodation, approved housing body accommodation, accommodation provided under the Housing Assistance Payment (HAP) scheme, accommodation provided under the Rental Accommodation Scheme (RAS), accommodation provided under the Social Housing Capital Expenditure Programme (SHCEP) schemes or any household on a transfer list are not included in the total number.

The document details the number of households who qualified for social housing support by Local Authority and indicates 3,104 households for County Kildare, a decrease of 8.3% (282 households) from 2019 to 2020. It indicates '1 adult households' continue to represent the largest household size grouping (1,630 of the 3104 households, which is an increase of 66 on 2019 figures). The largest cohort of applicants is within the 30-39 age bracket (main applicant) at 909 or 29.3%.

Household	Number	Percentage
1 adult	1630	52.50%
1 adult, 1-2 children	567	18.30%
Couple, 1-2 children	325	10.50%
Couple	159	5.10%
Couple, 3+ children	83	2.70%
Adult, 3+ children	56	1.80%
2 adults	76	2.40%
2 adult + 1 child	68	2.20%
Couple, 1+ adult, 1-2 children	53	1.70%
Couple, 1 or more other adults	31	1.00%
3 or more adults	25	0.80%
Couple, 1 or more other adults, 3 or more children	17	0.50%
3 or more adults with child/children	14	0.50%
	3104	100.00%

Table 55 - Household Type on Kildare Housing List, 2020

Age Profile	Number	Percentage
Less than 25	200	6.40%
25-29	323	10.40%
30-39	909	29.30%
40-49	763	24.60%
50-59	490	15.80%
60-69	298	9.60%
70+	121	3.90%

Table 56 - Age Profile (main applicant) on Kildare Housing List, 2020

Sources of Income	Number	Percentage
Social welfare only	1898	61.10%
Employment only	644	20.70%
Employment & social welfare	222	7.20%
Other	340	11.00%

Table 57 - Source of Income (main applicant) on Kildare Housing List, 2020

Time on the Housing List	Number	Percentage
<6 months	258	8.30%
6-12 months	188	6.10%
1-2 years	513	16.50%
2-3 years	354	11.40%
3-4 years	216	7.00%
4-5 years	229	7.40%
5-6 years	325	10.50%
7+ years	1021	32.90%

Table 58 - Time on the Kildare Housing List (main applicant), 2020

Classification of Housing Need	Number	Percentage
General needs	2544	82.00%
Enduring physical, sensory, mental health, intellectual	258	8.30%
Homeless	210	6.80%
Traveller	17	0.50%
Aged 65+	75	2.40%

Table 59 - Age Profile (main applicant) on Kildare Housing List, 2020

4.6.3 Social Housing Demand

Kildare County Council, the housing authority, records social housing demand in the county in the form of 1st Area of Choice. Figure 23 shows that Kildare-Newbridge MD, at 33%, has the highest 1st Area of Choice on the housing list, with the remaining MDs all at similar rates of demand.

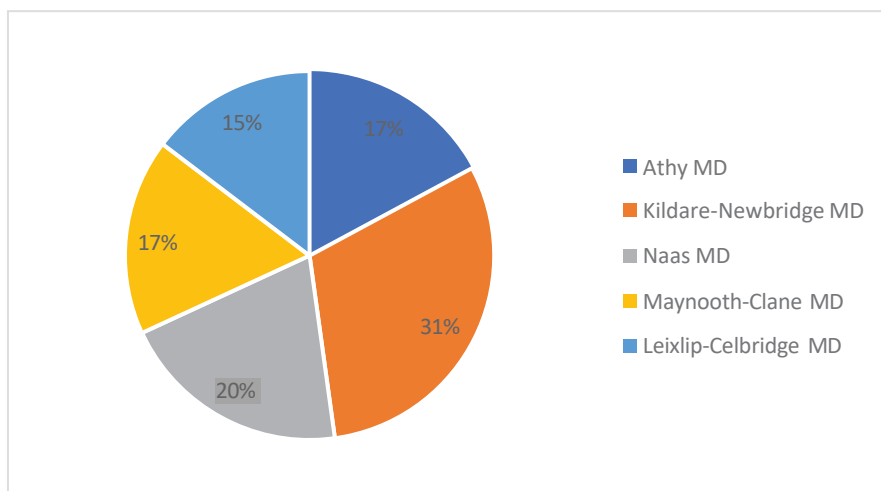


Figure 23 - First Area of Choice on Housing List, by MD, as of October 2021

Table 60 shows that overall demand for social housing support is mostly associated with urban areas, with 92.8% of demand for housing in the 18 main towns and 7.2% distributed across the rest of the county. Note these figures include all social housing applicants, including those already housed under the HAP scheme.

	1st Area of Choice	% of Total
Athy	747	11.5%
Castledermot	51	0.8%
Monasterevin	228	3.5%
Athgarvan	11	0.2%
Kilcullen	142	2.2%
Kildare	540	8.3%
Newbridge	1210	18.7%
Rathangan	71	1.1%
Kill	42	0.6%
Naas	954	14.7%
Sallins	146	2.3%
Clane	281	4.3%
Kilcock	193	3.0%
Maynooth	397	6.1%
Prosperous	48	0.7%
Celbridge	612	9.5%

	1st Area of Choice	% of Total
Leixlip	334	5.2%
Rest of County	469	7.2%
Total	6476	100%

Table 60 – *First Area of Choice on Housing List, by main towns, as of October 2021*

4.6.4 Social Housing Need and Supply

To fully address social housing demand (at current estimates) in Kildare by 2031, it would be necessary to provide 3,417 social housing units or 340 units a year over the period 2022 - 2031. This figure of 3,417 excludes households on the Housing Assistance Payment (HAP) scheme, accommodation provided under the Rental Accommodation Scheme (RAS) and accommodation provided under the Social Housing Capital Expenditure Programme (SHCEP) schemes).

Notwithstanding same however, this does not account for economic fluctuations that may increase or decrease the overall level of demand for social housing supports, for example the impact of the Pandemic on the economy affecting critical aspects such as housing supply, jobs, interest rates, average incomes, house prices etc. In particular, the supply of private housing and rental costs could result in variability in the demand for social housing and therefore, this figure is likely to increase. Section 5 of this report comprises the results of applying the HNDA Tool to Kildare County Council's affordability projections, including a forecast of the number of new household formations that will require social housing support over the HNDA period (2021-2031).

In terms of housing need and supply at the present time, Table 61 compares the 1st Area of Choice on the County Kildare housing list against the number of social housing units currently in the pipeline for the respective settlement. The table shows that there are 2,040 social housing units in the pipeline for County Kildare, to be delivered over the next 3-4 years, of which 537 are under construction, 907 at an advanced stage of funding approval, and a further 596 social housing units that are at a 'Proposal' stage. The table shows that current delivery streams represent c. 31.5% of existing housing need across the County (as of 2 November 2021), with relatively high levels of delivery in Naas, Celbridge and Leixlip, and with relatively low levels of delivery in Athy, Newbridge and Kildare.

	1st Area of Choice	SHIP	CAS	CALF	PPP	Part V	Leasing	Total
Athy	747		35	55				90
Castledermot	51		2				10	12
Monasterevin	228	9	16			17	28	70
Athgarvan	11		18					18
Kilcullen	142		4	65				69
Kildare	540			4		5	1	10
Newbridge	1210		2	97		2	114	215
Rathangan	71	9	35			4	1	49
Kill	42		33	39				72
Naas	954		76	153		12	233	474

	1st Area of Choice	SHIP	CAS	CALF	PPP	Part V	Leasing	Total
Sallins	146		4	29			10	43
Clane	281	25			77	10	10	122
Kilcock	193			47		7		54
Maynooth	397	1	65	103		3	14	186
Prosperous	48			16				16
Celbridge	612	49	93			38	118	298
Leixlip	334		4	44		27	121	196
Allenwood	49			7				7
Straffan	15	2				6		8
Narraghmore	5		4					4
Coill Dubh	45		10					10
Carbury/Derrinturn	71		5			3		8
Johnstown	11					5		5
Suncroft	16					4		4
Rest of County	257							0
Total	6476	95	406	659	77	143	660	2040

Table 61 - *Social Housing Units in the Pipeline compared to Social Housing Need*

Referring back to Table 41 (Granted Planning Permission in County Kildare by Unit Type), in the period 2018 to Q2 2021, planning permission has been granted for 8,977 units (multi-development houses and apartments). In accordance with Section 96 of the Planning and Development 2000 (as amended), noting 10% Part V requirement at the time, these permissions have the potential, if constructed, to deliver approx. 897 social houses.

It is estimated that c. 4,400 dwelling units will be commenced in the 18 months to end of 2022, therefore coming on stream post 2023, delivering c. 440 Part V units, noting potential crossover with Part V units referred to Table 61 above.

Furthermore, a proportion of permissions granted since 1st August 2021 will be subject to the amended Section 96 provisions, under which any new planning permissions for housing development will have a 20% Part V requirement, noting however that the 10% Part V (social housing only) requirement will remain applicable to land that was purchased between 1 September 2015 and 31 July 2021, and where permission is granted by 31 July 2026. This provision will have the effect of constraining the delivery of affordable housing under Part V over the short to medium term, particularly with a lag in commencement of development and potential for developers bringing applications forward to avail of the 10% Part V. Referring back to Table 15 (Projected households over the plan period), it is projected that 15,428 new houses will be required in County Kildare between 2023 and 2031. Due to delayed implementation of the 20% Part V requirement, this HNDA assumes that half the units for which permission will be granted will be subject to 10% Part V (social housing only) and the other half subject to 20% Part V (social and affordable housing), the following calculation is made:

Number of units required 2023 – 2031 ³¹	13,840
Number of units to be constructed Q3 and Q4 2021 and 2022	4,400 ³²
	<u>9,440</u>
Less 10% reserved for small schemes and one-off houses	<u>944</u>
	8,496
50% subject to 10% social housing only	425 social housing units
50% subject to 20% social and affordable	425 social housing units
	<u>425</u> affordable housing units
Total	1,275 units

The figure of 1,275 units comprises 850 social houses and 425 affordable houses. Overall potential delivery of Part V units can be summarised as follows:

Part V requirement for permissions granted since 2018	897 units
Part V requirement for commencements Q3 and Q4 2021 and 2022	440 units
Part V requirements for units required to 2031	<u>1,275 units</u>
Total	2,612 units

The figure of 2,612 comprises 2,187 social housing units and 425 affordable housing units. Together with the 1,503 currently in the pipeline (2,040 units minus 537 under construction, which would be expected to come on stream before HNDA period 2023-2031), it is estimated that the potential number of social housing units and affordable housing units deliverable in the HNDA period 2023-2031 is 3,690 and 425, respectively, noting this stock will be added to via other streams including through AHBs and the LDA.

Vacant units are an important part of overall housing supply. The last assessment of vacancy was in 2016 when the total number of vacant residential units in County Kildare was 4,712. While this figure is relatively low at 5.9% of the total housing stock in the county, it is still a significant number of houses and if these units were occupied it would go a long way towards meeting housing demands in the county. At a settlement level, Athy and Monasterevin have the highest vacancy rates (of total stock), at 12.6% and 11.1%, respectively. In Athy, 12.6% of the housing stock equates to 539 units. Athy is 1st Area of Choice for 747 households on the housing list. In Monasterevin, 11.1% of the housing stock equates to 189 units. Monasterevin is 1st Area of Choice for 282 households on the housing list. Newbridge is a pressure area of social housing demand, being 1st Area of Choice for 1,210 households (18.7%) on the housing list. Vacancy rate in Newbridge is 5.2%, equating to 427 houses. These figures demonstrate that addressing vacant dwellings can contribute significantly to meeting social housing need in the county, and in a manner which supports regeneration and compact growth, a key objective of the National Planning Framework.

³¹ Refer to Table 15

³² It was estimated that c. 2,843 new dwellings were commenced in County Kildare in the 12 months to 30th September 2021. Using this figure, a pro-rata figure for Q1 and Q2 2021 and 2022 was estimated.

4.7 Conclusions on Housing Stock and Housing Need

Area of interest	Key Issues Identified
<p>Housing quality</p>	<ul style="list-style-type: none"> • Kildare has the eighth largest housing stock in the State with total stock (occupied and unoccupied) recorded at 80,158 in the 2016 Census. • At Census 2016, over 89% or 65,663 of occupied housing in Kildare is classed as conventional housing (detached / semi-detached / terraced), compared to the State average of 86.5%. • Flats and Apartments represent 9.5% of housing which is lower than the State average of 11.8%. This is illustrative of the need for greater variety in housing type. In the intercensal period, 2011 to 2016, however, the number of Flats and Apartments in Kildare increased by 15.4% which, while it is close to the State average of 14.8%, suggests a shift in development trends towards Flats and Apartments. Furthermore, for the years 2018 to Q2 2021, planning permission was granted for 14,892 dwelling units in County Kildare, of which 4.1% are one-off houses, 62.1% scheme houses and 33.8% apartments. • In the period 2016 to end 2020, it is estimated that the total number of dwellings in County Kildare increased by 6,176 units, which includes 892 additional dwellings in the rural areas (outside towns, villages, rural settlements and rural nodes). The total number of rural dwellings in the county increased by 4.6%, and the total number of rural dwellings now represents 23.1% of the total housing stock in the county. • 45,266 dwellings (62% of total housing stock) in County Kildare were constructed before the year 2000, and based on the SEAI methodology relating to building regulations at the time, these dwellings would have an indicative BER rating of between C3 and G. <p>As of 2018, a total of 8,460 Home Energy Grants and 4,424 Free Energy Upgrades were granted in County Kildare, which totals 12,884 upgrades, equivalent to 17.5% of the occupied housing stock, or 16% of the total housing stock. This potentially means that approx. 32,000 houses in County Kildare continue to have a building energy rating of C3 or lower. A target of the Climate Action Plan 2021 is to complete 500,000 home retrofits to achieve a B2 BER.</p> <ul style="list-style-type: none"> • In Census 2016, the number of households classed as 'Owner Occupied' in Kildare was 52,806 and represents 72% of the total households, higher than the State (67.6%) and EMRA (64.9%) averages. <p>The number of households classed as 'Owned with Mortgage or Loan' decreased from 46% to 41% between 2011 and 2016, following the state trend, a stat influenced by the continued</p>

Area of interest	Key Issues Identified
	<p>economic downturn for much of the intercensal period and associated decrease in mortgage lending.</p> <p>The number of households that rent accommodation, at 24.4%, is below the State average of 27.6%. Similarly, the number of households that 'Rent from Local Authority' (6.1%) and 'Rent from Private Landlord' (17.2%), are below the State average of 8.43% and 18.25%, respectively.</p> <ul style="list-style-type: none"> • Kildare County Council has a housing stock of 5,436 dwelling units, as of October 2021, comprising mostly 3 bed units (61%), followed by 2 bed units (19.5%) and 1 bed units (11.9%). This percentage distribution is generally similar across the MDs, except for Celbridge-Leixlip where 2 beds account for a larger proportion of stock (25.6%), whereas, proportionately there are lesser 1 beds (6.7%).
Housing stock pressures	<ul style="list-style-type: none"> • It is projected that 13,840 new dwelling units will be required in County Kildare between 2023 and 2031, equating to approx. 1,537 dwelling units per annum. • In the period 2016 to Q2 2021, 7,214 new dwelling units were constructed in County Kildare, of which 12.6% were single houses, 83.6% scheme houses (detached, semi-detached, terraced houses), and 3.8% apartments. • In the 12 months to 30 September 2021, a total of 2,843 new dwelling units were commenced in County Kildare, compared to 1,559 in the 12 months to 30 September 2020. • For the years 2018 to Q2 2021, planning permission was granted for 14,892 dwelling units in County Kildare, of which 4.1% are one-off houses, 62.1% scheme houses and 33.8% apartments. • The annual rate of obsolescence in Kildare County Council is 0.05%, compared to the State average of 0.2% and EMRA average of 0.17%. • The vacancy rate for County Kildare was 5.9% in the 2016 Census, compared to the State average of 8%. At a settlement level, Athy and Monasterevin have the highest vacancy rates, at 12.6% and 11.1%, respectively. All other towns have moderate rates, noting the low vacancy rates experienced in Leixlip and Celbridge, at 3.0% and 3.4%, respectively. • The rate of overcrowding in County Kildare was 0.4% in Census 2016, compared to the State average of 0.7%. • The Summary of Social Housing Assessment (SSHA) Report, 2020, indicates that 3,104 households in County Kildare qualify for social housing support, a decrease of 8.3% (282 households) from 2019. It indicates '1 adult households' continue to represent the largest household size grouping (1,630 of the 3104 households (53%), which is an increase of 66 on 2019 figures). The largest cohort of

Area of interest	Key Issues Identified
	<p>applicants is within the 30-39 age bracket (main applicant) at 909 or 29.3%.</p> <ul style="list-style-type: none"> • Data available from Kildare County Council housing authority shows that as of October 2021, there were 3,417 households on the housing list, which excludes existing HAP tenancies, of which there are 2,272. • Demand for social housing support is mostly associated with urban areas, with 92.8% of demand for housing in the 18 main towns and 7.2% distributed across the rest of the county. <p>747 households (11.5% of total households on the housing list) name Athy as their '1st Area of Choice' for social housing support. 90 social houses in total are in the pipeline for delivery in Athy (including AHBs, Part V and Enhanced Leasing), equating to 12% of the housing need.</p> <p>Similarly, 1,210 households (18.7% of total households on the housing list) name Newbridge as their '1st Area of Choice' for social housing support. 215 social houses in total are in the pipeline for delivery in Newbridge (including AHBs, Part V and Enhanced Leasing), equating to 17.7% of the housing need.</p> <p>At a county level, there are 2,040 social housing units in the pipeline for delivery over the next 3 – 4 years, representing 31.5% of the social housing need (6,476 households) in the County (as of 2 November 2021).</p> <p>However, considering the trend in permissions granted, together with housing supply target for the County and changes to the Part V legislation enacted through the Affordable Housing Act 2021, it is estimated that there is potential for c. 2,612 Part V units in the pipeline for County Kildare during the HNDA period 2023 to 2031.</p> <p>It is projected that this figure of 2,612 will comprise 2,187 social housing units and 425 affordable housing units.</p> <ul style="list-style-type: none"> • Data available from the housing authority shows that the vacancy rate for the local authority housing stock is 4.03%, with a high of 5.67% in Naas MD and a low of 1.88% in Celbridge-Leixlip MD. • 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. • Vacant units are an important part of overall housing supply. The last assessment of vacancy was in 2016 when the total number of vacant residential units in County Kildare was 4,712. While this figure is relatively low at 5.9% of the total housing stock in the county, it is still a significant number of houses and if these units were occupied it would go a long way towards meeting housing demands in the county.

Area of interest	Key Issues Identified
	<ul style="list-style-type: none"> • At a settlement level, Athy and Monasterevin have the highest vacancy rates, at 12.6% and 11.1%, respectively. In Athy, 12.6% of the housing stock equates to 539 units. Athy is 1st Area of Choice for 747 households on the housing list. In Monasterevin, 11.1% of the housing stock equates to 189 units. Monasterevin is 1st Area of Choice for 282 households on the housing list. Newbridge is a pressure area of social housing demand, being 1st Area of Choice for 1,210 households (18.7%) on the housing list. Vacancy rate in Newbridge is 5.2%, equating to 427 houses. These figures demonstrate that addressing vacant dwellings can contribute significantly to meeting social housing need in the county, and in a manner which supports regeneration and compact growth, a key objective of the National Planning Framework. • Kildare County Council employs a Vacant Homes Officer within the Housing Section. The function of this position is to identify vacancy in the private housing stock. Identification is achieved by way of facilitating a vacant homes website, through which members of the public can report potentially vacant houses throughout the county. The inspection by the Vacant Homes Officer and, if necessary, correspondence to the owner, is a proactive step to encouraging refurbishment or sale of vacant houses. The Vacant Homes Officer encourages uptake of the Repair & Leasing Scheme. While uptake of this scheme has been slow to date, the increase in the maximum funding available from €40,000 to €60,000 has attracted renewed interest. • Kildare County Council has been allocated €4.78m under the Midlands Energy Efficiency Retrofit Programme and the 2021 Energy Efficiency Retrofit Programme, with a target of retrofitting 175 No units. Kildare County Council expect to complete 60 Units by Q4 2021(€1.64m spend) and 125 Units Q2 2022 (€3.15m spend). • In terms of housing maintenance and vacancy, 119 properties turned around to date in 2021 of which 47 were new house purchases and 72 are existing Kildare County Council stock. Work to 125 units is ongoing.
Size, type, tenure and location of future planned social housing supply	<ul style="list-style-type: none"> • Social housing projects in the pipeline comprise a total of 2,040 dwelling units, which are being delivered under SHIP, CAS (AHB), CALF (AHB) funding programmes³³ and also through Part V and Public Private Partnerships. Of these 2,040 dwelling units, and as of

³³ Social Housing Capital Investment Programme (SHCIP or SHIP), Capital Assistance Scheme (CAS), Capital Advanced Leasing Facility (CALF)

Area of interest	Key Issues Identified
	<p>15 November 2021, 537 were under construction, 907 at an advanced stage of funding approval, and a further 596 at 'Proposal' stage.</p> <ul style="list-style-type: none"> An uneven spatial distribution of social housing projects across the county is evident, with 8.7% in Athy MD, 14.8% in Kildare-Newbridge MD, 32.5% in Naas MD, 19.8% in Clane-Maynooth MD and 24.2% in Celbridge-Leixlip MD. There is a high concentration of social units in the pipeline for Naas, Celbridge and Leixlip, closely correlated with the high levels of house construction in those towns.
<p>Sustaining communities e.g. planned projects using tenure diversification/ regeneration</p>	<ul style="list-style-type: none"> Two sites, identified under the Land Aggregation Scheme, are being delivered under PPP. 1) 74 social housing units (50% of the site) constructed at Craddockstown, Naas; and 2) 77 social housing units (50% of the site) constructed at Butterstream, Clane. Kildare County Council are involved in an ongoing regeneration project in St. Patrick's Park, Rathangan. The current phase 2 of this project consists of the demolition of 15 units, refurbishment of 25 units, construction of 7 new units and overall improvements to public realm.

5. Housing Need and Demand Assessment

This section provides an analysis of the demographic, economic and social inputs indicated in the previous sections to inform a scenario for running the HNDA Tool for the assessment period 2023-2031.

5.1 Housing Supply Targets

Housing supply targets for County Kildare as per the Convergence Scenario is set out under Section 3.2.2. Table 12 shows the annual housing supply target figures under the convergence method, which are the figures input in the HNDA Tool. In addition, an unmet existing housing need of 346 households, distributed over the 10 years 2022 to 2031, has been input separately.

Year	Convergence
2020	1,521
2021	1,532
2022	1,553
2023	1,546
2024	1,495
2025	1,457
2026	1,473
2027	1,508
2028	1,559
2029	1,515
2030	1,481
2031	1,495

Table 62 - Forecasted Additional Households Per Annum, including existing unmet need

5.2 Household Income Projections

The default scenario within the HNDA Tool forecasts that, nationally, median incomes will grow uniformly at an assumed inflation rate of 2% per annum nationally, along with a modest growth scenario of 3.5% per annum, and a below-inflation scenario of 0.5% per annum.

Income is a significant indicator of economic conditions and is crucial in determining affordability in any housing market. A review of historic GDP growth was undertaken to establish growth rates from the baseline (i.e. 2017 for gross income). Data published by the World Bank³⁴ indicates that national GDP growth for Ireland was 8.5% in 2018, 5.5% in 2019 and 3.4% for 2020 and hence these rates of GDP growth have been applied in the HNDA.

³⁴ World Bank

<https://data.worldbank.org/indicator/NY.GDP.MKTP.KD.ZG?locations=IE>

A review of a number of sources has allowed a forecast of GDP rates, and thus income growth. Analysis of reviewed data is presented in Table 63.

	2021	2022	2023
European Commission ³⁵	7.2	5.1	
OECD ³⁶	4.2	5.1	
Statista ³⁷	4.23	4.84	3.7
ESRI ³⁸	12.6	7	
Central Bank ³⁹	3.4	5.6	4.8
Average	6.33	5.53	4.25

Table 63 - Forecasted GDP rates for Ireland

In its Economic Forecast Summary May 2021, the OECD reports that ‘After avoiding a decline in output in 2020 thanks to buoyant exports of Ireland-based multinationals, real GDP is projected to grow by 4.2% in 2021, despite stringent sanitary measures introduced early in the year. As vaccinations are rolled out and restrictions are gradually eased, domestic demand will strengthen, even though uncertainty will continue to weigh on firms’ investment decisions. Pent-up consumer spending, as households unwind pandemic-induced excess saving, is projected to lift growth to 5.1% in 2022.’

In the latest Quarterly Economic Commentary (Autumn 2021), the ESRI reports, ‘... we believe the economy is set to register growth of 12.6 per cent in the present year. Unemployment is now set to fall to 9 per cent by the end of the year. Modified total domestic demand, which is a more accurate barometer of underlying economic activity, is set to grow by over 7 per cent. Furthermore, we believe the economy will continue to grow strongly in 2022 with GDP set to increase by 7 per cent.’

In the absence of forecast data for the remainder of the HNDA period, a review of historic data has been carried out. Presented in Figure 24, in the 20-year period 2000 to 2020, with peaks and troughs, the average GDP growth rate was + 4.9%. One fact to note, as evident on the graph, is that GDP growth was up 25.18% from 2014. OECD, in a publication dated October 2016⁴⁰, reported that the main reason for the particularly high Irish GDP growth rates lies in the fact that in those preceding years, attracted in large part by low corporation tax rates, a number of large multinational corporations had relocated their economic activities, and more specifically their underlying intellectual property, to Ireland. As a result, sales (production) generated from the use of intellectual property now contributes to Irish GDP rather than to other countries. The same OECD publication

³⁵ EC Economic Forecast for Ireland (Summer 2021)

https://ec.europa.eu/economy_finance/forecasts/2021/summer/ecfin_forecast_summer_2021_ie_en.pdf

³⁶ OECD Economic Forecast Summary, May 2021

<https://www.oecd.org/economy/ireland-economic-snapshot/>

³⁷ Statista

<https://www.statista.com/statistics/375215/gross-domestic-product-gdp-growth-rate-in-ireland/>

³⁸ ESRI Quarterly Economic Commentary (October 2021)

https://www.esri.ie/system/files/publications/QEC2021AUT_0.pdf

³⁹ Central Bank Quarterly Bulletin July 2021

<https://www.centralbank.ie/docs/default-source/publications/quarterly-bulletins/qb-archive/2021/quarterly-bulletin--q3-2021.pdf?sfvrsn=12>

⁴⁰ OECD Report, October 2016

<https://www.oecd.org/sdd/na/Irish-GDP-up-in-2015-OECD.pdf>

reported that in 2015, Irish households experienced a growth of 5.3 % in their disposable income, and adjusted for price changes, the growth rate was 4.6%. As such, GDP growth rate alone cannot be fully relied upon for making projections for income growth.

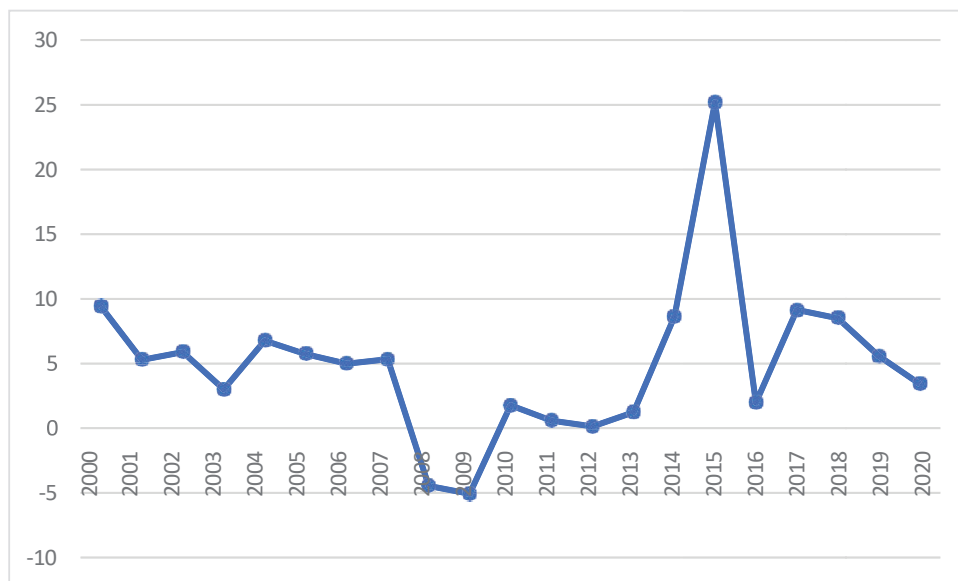


Figure 24 - GDP rates for Ireland, 2000 – 2020 (Source: World Bank)

If the 25.8% GDP growth rate for 2014-2015 was reduced to a more consistent rate of, say, 3%, this has the effect of reducing the 20-year period average growth rate to 3.8%. In a similar fashion, the 12.6% GDP rate expected for 2021 is not a true reflection of income growth, and therefore the ESRI rate of 12.6% has not been included for the purposes of establishing an income growth rate for 2021 (as per Table 63 above). This results in an average GDP rate of 4.75%.

Another useful trend is historic growth in the nominal median household disposable income at State level. Table 64 shows the growth in the period 2015 to 2019⁴¹.

Nominal median household disposable income (State)		% change
2013	34436	
2014	35305	3%
2015	37401	6%
2016	38953	4%
2017	39499	1%
2018	42865	9%
2019	43552	2%
Average % change year-on-year		4%

Table 64 - Nominal median household disposable income, State, 2013 – 2019 (Source: CSO)

⁴¹ Survey on Income and Living Conditions (SILC) 2019

<https://www.cso.ie/en/releasesandpublications/ep/p-silc/surveyonincomeandlivingconditionssilc2019/income/>

In this respect, based on the above market analysis and commentary, the average forecasted GDP growth rates of 4.7%, 4.5% and 4% have been applied for 2021, 2022 and 2023, respectively. A conservative forecasted GDP growth rate of 3.5% has been applied from 2024 onwards in the HNDA. In summary, the following GDP rates are applied to projected growth in household income:

2018:	8.5% GDP growth
2019:	5.5% GDP growth
2020:	3.4% GDP growth
2021:	4.7% growth
2022:	4.5% growth
2023:	4% growth
2024 onwards:	3.5% growth per annum

5.3 House Price Forecast

Forecasting house prices requires an examination of the various influencing factors including supply, demand and affordability.

According to the MyHome.ie Property Report Q3 2021⁴² the excess demand in the housing market is particularly evident in the mortgage lending data, noting that in the twelve months to June 2021 mortgage approvals equalled 42,600 – a fresh cyclical high. However, according to the data analysed in the MyHome.ie report, there were just 31,300 mortgages drawn down over the same period. This implies in excess of 25% of would-be homebuyers with mortgage approval are now failing to secure a property.

On the supply side, indicators are showing positivity. As noted above, the Banking & Payments Federation Ireland (BPMFI) *Housing Market Monitor Q2 2021*⁴³ reports that total number of completions in the first half of 2021 was around 10% higher than completions achieved during the same period in 2020 and only 1% less than total completions in the same period in 2019 when there were no pandemic-related restrictions on residential housing activity. If the sector continues to build at a rate similar to that of the second half of 2020, it is likely that total completions in 2021 can reach 22,000 units.

However, according to the Daft.ie Irish House Price Report Q3 2021⁴⁴, there were roughly 2,800 properties on the market in Leinster (outside Dublin) on 1st September 2021, down 41% from over 4,700 on the same date in 2020.

The BPMFI *Housing Market Monitor Q2 2021* does however report that given population growth is adding 30,000 units at a minimum each year, coupled with circa 100,000 units of latent demand built up over the past decade, it will take some time before homebuilding can start to address the housing shortage.

⁴² MyHome.ie Property Report Q3 2021

https://media.myhome.ie/content/propertyreport/2021/q32021/MyHomePropertyReportQ3-2021_1.pdf

⁴³ BPMFI Housing Market Monitor Q2 2021

<https://bpfi.ie/wp-content/uploads/2021/09/BPMFI-Housing-Market-Monitor-Q2-2021-web.pdf>

⁴⁴ Daft.ie Irish House Price Report Q3 2021

https://ww1.daft.ie/report/2021-Q3-houseprice-daftreport.pdf?d_rd=1

As referred to in the previous section, supply of housing in County Kildare is hinged on the expectation of the delivery of key infrastructure to support / facilitate new houses, including water services, roads, transportation, and telecommunications. Key projects such as the delivery of the Eastern Ring Road in Maynooth (funded under the Local Infrastructure Housing Activation Fund) is critical for the release of land for residential development in the town, with the subject land to the south-east of Maynooth having the potential to deliver between 800 and 1,200 new houses.

With demand continuing to outstrip supply for the foreseeable future, it is assumed that house prices will continue to rise. In addition, the ESRI has forecast⁴⁵ that unemployment rates on a national level will peak at 16.3% in 2021, but will fall to 7.1% in 2022.

The Society of Chartered Surveyors Ireland (SCSI) outlook for the residential property market and price developments over the next 12 months highlights that Dublin house prices are expected to grow by 4% whilst outside of Dublin house prices are forecasted to rise by up to 6%, on average.⁴⁶

CBI rules include the 90% LTV limit which requires a minimum deposit of 10% before one can get a mortgage and the LTI limit which restricts the amount of money one can borrow to a maximum of 3.5 times gross income. According to the CSO, average weekly earnings increased by 3.9% in the 12 months to Q2 2021. With many employees working remotely over the past 19 months, the ability to increase savings towards a deposit for a house may provide some purchasers with a higher level of spending power. However, further loosening of Covid-19 related restrictions in October 2021 have triggered the return of many employees to the office. This has the potential to increase living costs and by association decrease saving capacity.

In terms of national policy, the Government's Housing for All – A New Housing Plan for Ireland 2021, seeks to act decisively to expand the options for those currently facing affordability constraints in buying or renting a home with an unprecedented level of financial commitment and delivery ambition.

The Affordable Housing Act 2021, provides for two schemes delivering on the Programme for Government commitment on affordability and to prioritise the increased supply of affordable homes through:

1. affordable homes on local authority lands,
2. a new affordable purchase shared equity scheme.

Affordable homes on local authority land are to be made available through the support of the €310 million Serviced Sites Fund (SSF). To date, the Department has received one application from Kildare County Council for funding under the Serviced Sites Fund, for 10 no. affordable homes in a planned mixed tenure development in Ardclough, Celbridge.

These homes will come with an initial price of between 10% and 40% below market price, with the discount provided remaining as a fully-repayable equity charge against the property. The scheme is targeted at first-time buyers, with some limited exceptions as detailed in the Affordable Housing Act 2021.

Since 1st September 2021, the Affordable Housing Fund (AHF) replaces the Serviced Sites Fund (SSF).

In addition, Budget 2021 allocated €75 million for the Affordable Purchase Shared Equity Scheme, which is aimed at first-time buyers buying a new-build private home. It will help first-time buyers secure their own home by bridging the gap between the mortgage available to them and the price of

⁴⁵ ESRI Quarterly Economic Commentary (October 2021)
https://www.esri.ie/system/files/publications/QEC2021AUT_0.pdf

⁴⁶ Residential Property Market Monitor July 2021 (SCSI)
<https://scsi.ie/residential-property-market-monitor-july-2021/>

the home they want.

The provision of new-build affordable homes through the measures mentioned above are designed to increase housing supply in general, thereby helping to address the under-supply that currently exists.

Other affordability measures, such as the Help to Buy Scheme and the Rebuilding Ireland Home Loan, are also available to eligible purchasers nationally to make home ownership more affordable.

The Help to Buy Scheme may return tax paid in the previous four years to eligible first-time buyers, up to a maximum amount of €30,000, for a new home. Budget 2022 has extended this scheme through to the end of 2022.

The Rebuilding Ireland Home Loan enables credit worthy first-time buyers to access sustainable mortgage lending to purchase new or second-hand properties in a suitable price range. There are no set minimum income limits; however, applicants do need to have sufficient borrowing capacity and must be capable of repaying the mortgage.

In November 2021, the LDA launched Project Tosaigh, under which the LDA would enter into 'forward purchase' transactions with housebuilders / landowners, to unlock land with full planning permission that is not being developed by private sector owners due to financing and other constraints and use it to accelerate the supply of affordable housing.

In addition, Part V of the Planning and Development Acts 2000 to 2020 has been amended by the Affordable Housing Act 2021.

These changes to Part V primarily apply to land purchased on or after 1 August 2021. Any new planning permissions for housing development on land will have a 20% Part V requirement.

- At least half of the Part V provision must be used for social housing support
- The remainder can be used for affordable housing, which can be affordable purchase, cost rental or both.

Another Government intervention is the introduction of a Zoned Land Tax in Budget 2022. The measure, aimed at boosting the supply of housing, is intended to replace the current Vacant Site Levy. Full details of the tax measure have yet to be announced but it is anticipated that the tax will have a starting annual rate of 3% on the market value of land, and will be applied to land that is vacant or idle for in excess of 12 months, zoned for residential or regeneration purposes, in an area in need of housing, and additionally, will be applied to land regardless of size, noting that the Vacant Site Levy applies to only those sites which are greater than 0.05ha, which precluded many city or town centre infill sites.

Meanwhile, a dilemma which continues to undermine housing supply targets relates to construction costs, including land prices, materials and labour. The SCSi Residential Property Market Monitor July 2021, reports *'the high costs associated with delivering a new house to the market, coupled with recent construction material price inflation, is resulting in new homes becoming more and more unaffordable for purchase'*.

A report published in June 2021 by KPMG Future Analytics on behalf of Cork Chamber and the Southern Region Construction Industry Federation, titled 'Addressing the Viability and Affordability of Apartment Development in Our Cities', reports that 'the sustainable delivery of new apartment developments is vital to meet both short-term and long-term demand and deliver objectives under the National Planning Framework for the compact spatial development and densification of Ireland's cities' and that 'Recent industry research and insights have highlighted an emergent issue around the viability and affordability of new apartment construction in Ireland's cities. Research commissioned by the Cork Chamber and CIF in 2019 found that the high cost of apartment delivery in Cork City resulted in a sales/rental price far above what an average buyer/renter would be able to afford.' The report proposes five recommendations to support the viability and affordability of new apartment development in Ireland, including the reduction of the rate of VAT on residential construction activity.

Considering the above, it is anticipated that an upward trend on house prices will continue in the short to medium term, and particularly for Kildare, which has witnessed an average house increase by 10.5% in the 12 months to July 2021; with an average of 42% of houses sold since 2019 being to first-time buyers; and a high uptake of the Help-to-Buy scheme. As noted above, analysis of data for County Kildare shows that in the 12 months to 30 September 2021, a total of 2,843 new dwellings were commenced, compared to 1,559 in the 12 months to 30 September 2020, indicating green shoots for the supply side. In line with SCSi Residential Property Market Monitor July 2021, it is forecast that house prices in Kildare will rise by an average of 6% in 2022.

For forecasting the longer period of 2023-2028, it is considered relevant to look at past trends in mean and median house prices for County Kildare. The historic house price data for County Kildare allows for an understanding of the local market context and how broader economic shifts and macroeconomic trends transfer locally.

It is noted that under the default scenario within the HNDA Tool mean and median house prices are assumed to grow uniformly at 2.25% per annum, nationally.

For mean prices, data from the Residential Property Price Register, the CSO and Daft has been analysed and year on year trends (mean percentage change) have been presented below in Table 65.

Year	Residential Property Price Register	CSO HPA02	Daft House Price Reports	Average
	Year-on-Year % change	Year-on-Year % change	Year-on-Year % change	Year-on-Year % change
2010 (base year)				
2011	-6.64%	-11.71%	-26.72%	-15.02%
2012	-15.87%	-17.41%	-2.86%	-12.04%
2013	2.63%	4.40%	-0.16%	2.29%
2014	11.35%	16.15%	16.51%	14.67%
2015	10.94%	5.78%	2.26%	6.33%
2016	5.41%	6.43%	8.59%	6.81%
2017	1.81%	6.13%	8.96%	5.63%
2018	9.23%	7.46%	4.75%	7.15%
2019	5.63%	3.38%	-0.80%	2.74%

Year	Residential Property Price Register	CSO HPA02	Daft House Price Reports	Average
	Year-on-Year % change	Year-on-Year % change	Year-on-Year % change	Year-on-Year % change
2020	3.39%	3.00%	5.93%	4.10%
2021*	8.64%**	10.5%**	11.81%**	7.93%

*Up to end July 2021

**12 months to July 2021

Table 65 - Mean Residential Property Price Transactions in Kildare 2010-2021 (Source: RPPR, CSO, Daft)

Table 65 indicates that in the years 2015 to 2019, an era which represents a settled recovery post global economic recession and pre-covid-19 pandemic, mean property prices increased by an average of 5.7%. The table also indicates the severity of the Covid-19 pandemic during which transactions and house prices continued to rise against all the odds in the face of a severe under supply of houses on the market. A deeper analysis of the CSO property price index shows that in the 12 months to July 2021, mean house prices increased by 10.5%.

For median prices, data from the CSO has been analysed and year on year trends (average percentage change) have been presented below in Table 66.

	CSO HPA02	Year-on-Year % change
2010 (base year)	239998	
2011	205000	-17.07%
2012	175000	-17.14%
2013	177488	1.42%
2014	210000	18.32%
2015	230000	9.52%
2016	247500	7.61%
2017	260000	5.05%
2018	281781	8.38%
2019	296803	5.33%
2020	315000	6.13%
2021*	317500	10.2%**

*Up to end July 2021

**12 months to July 2021

Table 66 - Median Residential Property Price Transactions in Kildare 2010-2021 (Source: CSO)

Table 66 indicates that in the years 2015 to 2019, median property prices in County Kildare increased by an average of 7.2%. The table also indicates the severity of the Covid-19 pandemic during which transactions and house prices continued to rise against all the odds in the face of a severe under supply of houses on the market. A deeper analysis of the CSO property price index shows that in the 12 months to July 2021, median house prices increased by 10.2%.

Under the default scenario within the HNDA Tool mean and median house prices are assumed to grow uniformly at 2.25% per annum, nationally.

Following the above analysis, the forecast of 6% price rise for 2022, for both mean and median house prices, is considered rationalised, and in terms of the subsequent 6 years, 2023 to the end of 2028, a return to the pre-pandemic price levels is expected, however to a lesser degree, to take account of Government intervention to facilitate the delivery of affordable housing. As such a 5% increase is forecasted for 2023, 2024 and 2025, 4% for 2026, 2027 and 2028, and then 3.5% per annum to 2031, being the end of the HNDA period.

5.4 Rent Price Forecast

The RTB Rent Index for Q2 2019, 2020 and 2021 show that the standardised monthly rent for Kildare increased year-on-year by 10.5%, 6.5% and 8.2%, respectively. These rates have been applied to the HNDA tool for those respective years.

As outlined above, the entire county of Kildare is designated a Rent Pressure Zone (RPZ). In accordance with the Residential Tenancies (No. 2) Act 2021, from the enactment date (16th July 2021), rental growth of existing tenancies in properties within the RPZ must be capped in line with general inflation, as recorded by the Harmonised Index of the Consumer Price (HICP). Previously, rent increases in RPZs were capped at 4% per year.

The Harmonised Indices of Consumer Prices (HICP) measure the changes over time in the prices of consumer goods and services acquired by households. They give a comparable measure of inflation as they are calculated according to harmonised definitions.

This new legislation will require landlords to restrict rent increases in line with general inflation. Furthermore, the anticipated Residential Tenancies (No.3) Bill 2021 will limit rent increases to a maximum of 2% per annum in the event that general inflation exceeds that rate. The rules for RPZs are in place until 31 December 2024.

While new tenancies are not affected by this restriction, it should influence rental values over the next three years, at least. A review of the EuroStat data browser⁴⁷, the Harmonised Indices of Consumer Prices (HICP) indicated that the general inflation rate for Ireland in 2018, 2019 and 2020 was 0.7, 0.9 and -0.5, respectively. Current trends show that for 2021, the general inflation rate could be over 1.

The Affordable Housing Act 2021 provides for the introduction of a new form of tenure in Cost Rental. The Cost Rental Scheme is a new form of long-term sustainable home rental. Cost rental is not-for-profit housing where the rent paid covers the cost of the construction, management, and maintenance of the house. A number of cost rental schemes have already been delivered through Approved Housing Bodies. The provision of Cost Rental housing is being implemented through the new Cost Rental Equity Loan (CREL) scheme, seeking to generate initial rents which are at least 25% below comparable open market prices, delivering significantly improved affordability for renters. Local authorities can also

⁴⁷ Eurostat Data Browser

https://ec.europa.eu/eurostat/databrowser/view/PRC_HICP_AIND_custom_1425086/default/table?lang=en

deliver cost rental dwellings under the Affordable Housing Fund (AHF), which has replaced the Serviced Sites Fund (SSF).

In addition, the Land Development Agency (LDA) is tasked to work with Government Departments, local authorities, state agencies and other stakeholders to assemble strategic sites in urban areas and ensure the sustainable development of social and affordable homes for rent and purchase.

Budget 2022 also makes a commitment to an additional 14,000 Housing Assistance Payment (HAP) tenancies and a further 800 Rental Accommodation Scheme (RAS) tenancies.

In terms of designation as a Rent Pressure Zone, in 2017, the LEAs of Celbridge-Leixlip, Naas, Newbridge and Maynooth were designated; in April 2020, Athy LEA was designated; and finally, in September 2020, all of County Kildare was designated. Despite the 4% rent cap, which has existed since December 2016, the RTB Rent Index for Q2 2019, 2020 and 2021 show that the standardised monthly rent for Kildare increased year-on-year by 10.5%, 6.5% and 8.2%, respectively. The rent cap associated with RPZs, previously 4%, now aligning with inflation, but also to be capped at 2%, does not affect new tenancies in new build dwelling units. Again, it is highlighted that the current rules for RPZs are in place until 31 December 2024.

Based on the above analysis, for the period 2022 to 2024, it is forecast that rental prices in Kildare will rise an average of 4% per annum for the HNDA period (to 2031), which takes account of the potential for an end to market intervention on rent prices by either the end of 2024 or a number of years later.

5.5 HNDA Housing Need Estimate

Applying the above analysis on future house prices, rental values and income, and using the HNDA methodology and incorporating the Convergence Scenario for Housing Supply Target (with existing unmet housing need included) at a County Level, Kildare County Council has produced an estimate of housing need to 2031, broken down by tenure type, as outlined in Table 67, while Table 68 shows housing need broken down by year to 2031.

	% Tenure Breakdown	Number of New Dwellings 2023-2031
New private ownership homes	31.50%	4360
New private rental homes	27.70%	3834
New affordable homes (Affordability Constraint)	10.60%	1467
New Social Housing homes	30.20%	4180
	100%	13,840

Table 67 - Forecasted housing need by tenure type

	2023	2024	2025	2026	2027	2028	2029	2030	2031	Total
New private ownership homes	519	492	469	464	475	491	477	466	471	4324
New private rental homes	439	420	420	420	430	429	417	393	396	3764
New affordable homes (Affordability Constraint)	93	119	146	177	196	249	258	281	299	1818
New Social Housing homes	530	499	458	448	442	424	397	374	362	3934
Total Housing Need	1581	1530	1493	1509	1543	1593	1549	1514	1528	13840

Table 68 - Forecasted housing need by tenure type

Meeting this assessed forecast need (in addition to outstanding existing need) will be delivered by a combination of delivery methods as set out in the previous section.

Table 69 compares the HNDA Tool estimations with the estimations on delivery outlined under Section 4.6.4, reiterating that the Tool estimates the housing tenure of new household formations over the HNDA study period and therefore does not account for existing households, either on the housing list or those falling within the bracket of affordability constraint.

	HNDA Tool estimated need to 2031	Estimations on delivery based on current data on social housing projects and assumptions in respect of Part V
New affordable homes	1,467	425
New Social Housing homes	4,180*	3,690

Table 69 - HNDA Tool estimations compared to current information on delivery

* This figure does not include the 6,476 households currently on the housing list or new qualifying households in 2022

Kildare County Council will support the delivery of new social and affordable homes, including through the local authority affordable purchase scheme, the 'First Home' / shared equity scheme, cost rental, both directly and through AHBs and the LDA in the county.

New social and affordable homes will be delivered through direct builds (using a range of funding mechanisms including direct State supports), through the amended provisions of Part V, through acquisition arrangements, and through leasing arrangements.

Kildare County Council will support the renovation and re-use of obsolete, vacant and derelict homes, and to incentivise bringing empty homes into use through various means, including the conversion of vacant properties into new social and affordable homes through schemes including the Repair and Leasing Scheme, the Buy and Renew Scheme, and long-term leasing.

Housing needs will also continue to be met through the provision of HAP tenancies, enabling households in need to access accommodation in the private rental sector at a rent they can afford.

It should be noted that according to the DHLGH, the HNDA Tool is intended to “give broad, long-run estimates of what future housing need might be, rather than precision estimates.” It offers ‘policy-off’ forecasts with its outputs subject to the inputs, scenarios, and assumptions built into the model and set out in this report. The HNDA as a result identifies potential issues and pressures in the housing market. This will allow Kildare County Council to formulate housing and planning policy to meet current and future housing need in County Kildare.

Section 7 sets out policies that will support the delivery of social and affordable housing to meet assessed need in Kildare County over the strategy period, as well as supporting the broader delivery of sustainable planning and housing in County Kildare.

6. Specialist Provision

This section addresses Section 4 of the HNDA analysis in line with the Guidance on the Preparation of a HNDA, in terms of the assessment of need for specialist provision for households requiring a specific housing solution suited to their needs that addresses sometimes complex issues around disability and health, ethnic status, etc.

Specialist provision refers to three broad categories, which in turn cover six types of housing related provision aimed at supporting independent living and allowing people to live well and with dignity.

The number of households with a housing requirement should be identified for the following categories of specialist need:

- Older people
- People with a disability
- Homeless
- Travellers
- International protection applicants
- Third Level Students

6.1 Older People

The Kildare Age Friendly Strategy 2019-2021, reports that the ageing of our population from this point onwards will represent one of the most significant demographic and societal developments and challenges that Ireland has encountered. According to Census 2016, and as shown in Table 70 below, there were 22,104 people over 65 living in Kildare in 2016, representing 10% of the county’s population, but what’s more significant is that the figure represented a 32.2% increase in that cohort of the population from the 2011 census.

The HNDA Data Source provides a projection per annum to 2040 for the population over the age of 65 years for each local authority. The projection is based on the NPF 50:50 City population growth scenario and is as per the ESRI population projections reported in the ESRI December 2020 publication ‘Regional demographics and structural housing demand at a county level’⁴⁸. Table 70 shows the actual figures from Census 2006, 2011 and 2016 followed by the projected growth figures for 2026, 2031 and 2040. The table suggests that by 2031, 16% of the population of County Kildare will be over the age of 65 years, with this rate increasing to 21% by 2040.

⁴⁸ ESRI December 2020 publication ‘Regional demographics and structural housing demand at a county level’
<https://data.gov.ie/dataset/esri-population-projections-by-local-authority>

In real terms, the table indicates that the number of people over the age of 65 in County Kildare in 2031 will be 93% higher than in 2016; and that the number of people over the age of 65 in County Kildare in 2040 will be 167% higher than in 2016. The aging profile of the population has considerable implications for public policy areas such as housing, health, urban and rural planning, transport, policing, the workplace and the business environment.

	2006	2011	2016	2021	2026	2031	2040
Total Population	186335	210312	222504	238971	251895	262,622	279,715
Population over 65	12779	16656	22014	28,013	34,843	42,588	58,870
% of Total	7%	8%	10%	12%	14%	16%	21%

Table 70 - Population projections for County Kildare (Source: ESRI)

The ‘*Housing Options for Our Ageing Population Policy Statement*’, jointly published in 2020 by the Department of Housing Planning and Local Government and the Department of Health, recognises the need to plan ahead to meet the accommodation needs of an ageing Ireland.

The Policy Statement supports the development of housing and services on centrally located sites within urban areas as research shows that good quality, well connected, urban centres with a range and choice of housing tenures and types actively supports ageing in place. Older people can choose housing that is appropriate and responsive to more complex needs, enable them to enjoy more active, healthy and socially connected lives and to age healthily and safely within their community. Simultaneously we recognise that older people contribute a wealth of skills and experiences that enhance all of our communities bringing significant value across the generations.

The Policy Statement refers to a 2016 Housing Agency report, ‘Housing for Older People – Thinking Ahead’, which estimates that 15% of those aged 65+ would be willing to move to a different home in their community and that a further 15% would choose to move to age-friendly accommodation, if it were available. A further 4% of older people would live in nursing homes. It was further estimated that 66% of those over 65 would prefer to stay in mainstream housing.

The Policy Statement refers to McAuley Place in Naas as a case study which highlights the importance of location when choosing appropriate housing and how a suitable location can help older people to age in place. McAuley Place consists of 53 self-contained apartments in the centre of Naas town, on the grounds of the former Convent of Mercy. It is a managed service providing centrally located housing for older people who are capable of independent living.

A range of housing options are also available for older people in County Kildare. This includes measures to enable older people to live independently in their own homes where possible. Kildare County Council provides housing adaptation grants to enable older people to adapt their homes to their needs and allow them to continue living at home, including the Housing Aid for Older People Grant. This enables recipients to carry out essential repairs. Budget 2022 has made provision for a further 11,000 grants to adapt the homes of older people and people with a disability. The Council also supports social tenants in obtaining suitable accommodation, including through maintaining Local Authority social rented stock suitable and adapted to the needs of older people.

Housing Adaptation Grants are administered through Kildare County Council and are available where changes need to be made to a home to make it suitable for a person with a physical, sensory or intellectual disability or mental health difficulty to live in. There are three types of grants available: Housing Adaptation Grant for People with a Disability, Mobility Aids Grant, and the Housing Aid for Older People Grant. These have been in operation since 2008.

Housing Aid for Older Persons Scheme

The Housing Aid for Older Persons Scheme aims to improve the living conditions of older people by carrying out minor repairs to the main areas of their homes.

Table 71 shows the uptake of the Housing Aid for Older People Grant in County Kildare in the period 2008 to 2020, with a total of 2,260 grants awarded.

Year	Number of Payments	Value of Payments
2008	0	0
2009	158	857,000
2010	334	2087000
2011	289	1,722,000
2012	114	635,202
2013	166	782,433
2014	182	689,410
2015	155	628,671
2016	97	394,237
2017	188	868,519
2018	220	952,962
2019	233	1,013,108
2020	124	529,925
	2,260	11,160,467

Table 71 - Uptake of Housing Aid for Older People Grant in County Kildare (Source: DHLGH)

Housing Adaptation Grant for People with a Disability

The Housing Adaptation Grant for People with a Disability assists with meeting the needs of a member of the household who has a disability, for example, making it wheelchair-accessible, extending it to create more space, adding a ground-floor bathroom or toilet or a stair-lift.

Table 72 shows the uptake of the Housing Adaptation Grant for People with a Disability in County Kildare in the period 2008 to 2020, with a total of 2,215 grants awarded.

Year	Number of Payments	Value of Payments
2008	3	60,000
2009	51	424,000
2010	186	1702000
2011	151	1,072,000
2012	132	909,929
2013	143	900,992

Year	Number of Payments	Value of Payments
2014	146	942,520
2015	194	1,217,811
2016	207	1,349,029
2017	287	1,938,849
2018	248	1,457,279
2019	263	1,484,642
2020	204	1,231,354
	2,215	14,690,405

Table 72 - Uptake of Housing Adaptation Grant for People with a Disability in County Kildare
(Source: DHLGH)

Mobility Aids Grant Scheme

The Mobility Aids Grant Scheme provides grants for works designed to address mobility problems in the home. For example, the grant can be used for the purchase and installation of handrails. It is mainly for older people, but people with disabilities can also access it.

Table 73 shows the uptake of the Mobility Aids Grant Scheme in County Kildare in the period 2008 to 2020, with a total of 126 grants awarded.

Year	Number of Payments	Value of Payments
2008	2	7,000
2009	5	19,000
2010	22	61,000
2011	17	58,000
2012	24	77,681
2013	15	60,400
2014	12	45,022
2015	23	94,196
2016	0	0
2017	6	18,750
2018	0	0
2019	0	0
2020	0	0
	126	441,049

Table 73 - Uptake of Mobility Aids Grant Scheme in County Kildare (Source: DHLGH)

6.2 People with Disabilities

Table 74 shows the number of persons with a disability in County Kildare, Eastern and Midland Region (EMRA, and the State for 2011 and 2016, and as a percentage of the total population. The table shows that County Kildare is slightly below the regional and national average, however in real terms the table shows that the number of persons with a disability increased from 24,369 in 2011 to 27,767 in 2016, equating to a 14% increase. This compares to a 9% increase for EMRA and 8% increase for the state.

	Kildare		EMRA		State	
	2011	2016	2011	2016	2011	2016
Total Population	210312	222504	2209463	2328517	4588252	4761865
Persons with Disability	24369	27767	279102	305015	595335	643131
% of total	11.6%	12.5%	12.6%	13.1%	13.0%	13.5%

Table 74 - Persons with a disability 2011 and 2016 for County Kildare, EMRA and State (Source: CSO)

Kildare County Council endeavours to carry out specialist extensions and alterations to Local Authority houses to accommodate the needs of disabled persons. Related initiatives include the housing adaption grant and mobility aid grant (figures shown in Tables 72 and 73 above).

As reported in the Summary of Social Housing Assessments 2020, there were 299 households on the Kildare County Council social housing list in need of accommodation based on disability. Table 75 compares disability as the main need for social housing support against the 2019 and 2020 averages for the State and EMRA. The table shows the relatively high rate of increase for Kildare, with disability as the main need for social housing at 9.6% for 2020, compared to 5.3% for the EMRA region and 8.2% for the State. Also in terms of figures, the number of applicants with disability as the main need for social housing increased from between 2019 and 2020 whereas the figures for EMRA and the State decreased by 9% and 5%, respectively.

	2019			2020		
	Total Need	With a Disability	% of Total Need	Total Need	With a Disability	% of Total Need
State	68693	5319	7.7%	61880	5057	8.2%
EMRA	41941	2170	5.2%	37628	1991	5.3%
Kildare	3386	291	8.6%	3104	299	9.6%

Table 75 - Disability as the Main Need for Social Housing Support for County Kildare, EMRA and State (Source: Summary of Social Housing Assessments 2020)

6.3 Homeless

A 2019 figure of 155 homeless persons for County Kildare is pre-programmed into the HNDA Tool, a figure which is used in Appendix 1 to the letter issued by the Minister for Housing, Local Government and Heritage to local authorities on the 18 December 2020 (Structural Housing Demand in Ireland and Housing Supply Targets).

As encouraged in the HNDA guidance, locally available sources have been used to calculate a more accurate figure for homeless presentation in the county, which amounts to 168. This figure is based on the fact that all homeless accommodation facilities are at full capacity during the Winter months.

Facilities include Own Front Door (OFD) units, Supported Temporary Accommodation (STA) and Temporary Emergency Accommodation (TEA). The emergency accommodation is specifically for people on Kildare County Council’s social housing list so all presentations would be Kildare residents.

Another type of emergency accommodation is Private Emergency Accommodation (PEA). This is accommodation which is facilitated by private providers and can accommodate homeless persons not on Kildare County Council’s housing list. While providing for sufficient headroom would target this proportion of homeless presentation that may be Kildare residents, there is however the potential for double counting of ‘Existing Need’ with another local authority. As such, the capacity of Private Emergency Accommodation (PEA) is not included in the figure for homelessness.

Homelessness requires an inter-agency approach to provide housing options for those who need it. In line with the RSES, the Council will continue to implement the Homeless Action Plan 2019-2021 and support related initiatives to address homelessness, including the work of the Dublin Region Homeless Executive.

6.4 Travellers

The Annual Traveller Count conducted by Kildare County Council in 2020 states that there were 347 Traveller families residing in County Kildare, up from 335 in 2019. Table 76 shows the breakdown of accommodation type for 2019 and 2020. Figure 25 shows the distribution of accommodation type as a percentage of the total for 2020. The table shows that there was a marked decrease in the number of families in ‘roadside’ and ‘homeless’ accommodation, and an increase in the number of families in ‘private rented’ and ‘Approved Housing Body (AHB)’ accommodation. The table and chart show that ‘Standard Housing’ and ‘Private Rented’ share the highest proportion of traveller accommodation in 2020.

	2019	2020
Roadside	24	12
Homeless	26	21
Halting Site	14	13
Group Housing	21	19
Private Rented	74	94
Standard Housing	94	95
Single Instance	2	4
Private Owned	45	45
RAS	10	10
AHB	25	34
TOTAL FAMILIES	335	347

Table 76 - Traveller Count and Accommodation Type, County Kildare, 2019 and 2020
(Source: Kildare County Council)

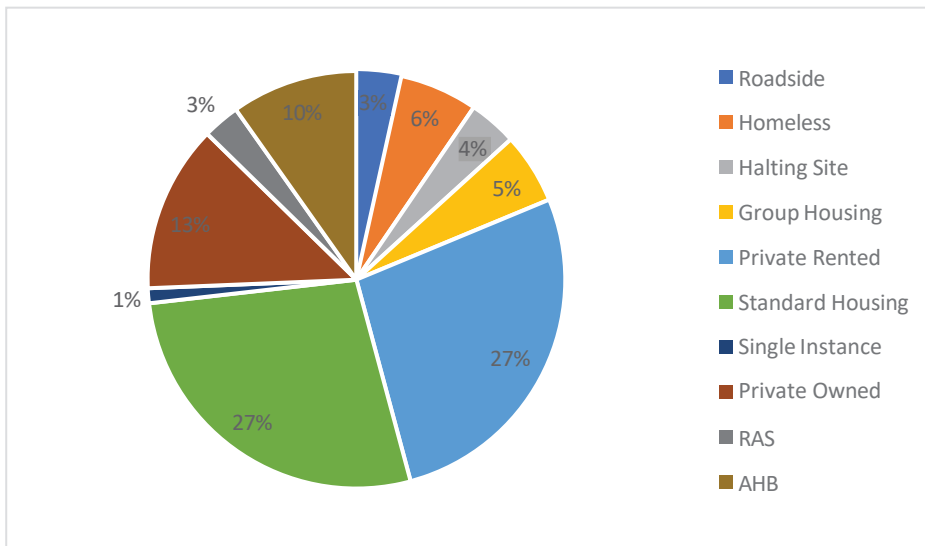


Figure 25 - Distribution of Traveller Accommodation Type, Kildare County Council, 2020 (Source: Kildare County Council)

The current position in relation to Traveller specific accommodation provided by Kildare County Council for Traveller families is as follows:

The Housing (Traveller Accommodation) Act 1998 requires Kildare County Council (the 'Council') to adopt a Traveller Accommodation Programme to meet the accommodation needs of Travellers within their functional area for the period specified in the programme. The current Traveller Accommodation Programme is for the period 2019-2024.

The aim of the Traveller Accommodation Programme is:

- To enhance the management and services to the current Traveller specific housing stock through planned maintenance and upgrades to current stock;
- To provide Traveller specific housing units within the county through capital funding for new builds; and
- To develop basic services including the provision of temporary sites, to directly improve the living standards of Traveller families who are homeless and are awaiting permanent accommodation.

The Traveller Accommodation Programme encompasses a range of housing options including:

- Standard Housing
- Group Housing
- Halting Sites
- Social Leasing and the Rental Accommodation Scheme
- Housing Assistance Payment (HAP) for private rented accommodation
- Housing with Approved Housing Bodies
- Rebuilding Ireland Home Loans

Kildare County Council assists members of the travelling community in applying for any of the above options.

Section 6 (as amended in the Housing (Miscellaneous Provisions) Act 2009) requires housing authorities, for the purposes of preparing a programme in respect of their functional area, to make an assessment of the accommodation needs of Travellers who are assessed under Section 20 of the Housing (Miscellaneous Provisions) Act 2009 as being qualified for social housing support, including the need for sites. This assessment of need includes a current assessment and a projected needs assessment for traveller accommodation.

The current Traveller Accommodation Programme sets out a combined accommodation need assessment for the period 2019 to 2024. Table 77 shows the need assessment figures for 2019 to 2024 and also figures for units delivered for 2019 and 2020. The Traveller Accommodation Programme 2019-2024, aims to deliver 73 homes to Traveller families over the five-year period, with 28 of these units proposed as additional Traveller-specific accommodation.

	2019	2020	2021	2022	2023	2024
	Target (Delivery)	Target (Delivery)	Target (Delivery)	Target (Delivery)	Target (Delivery)	Target (Delivery)
Standard Housing	9 (10)	10 (14)	7	7	6	4
Traveller specific accommodation units	1 (1)	8 (4)	5	5	5	6
TOTAL	10 (11)	18 (18)	12	12	11	10

Table 77 - Traveller accommodation need assessment and delivery figures (Source: Kildare County Council)

There are four Traveller-specific accommodation communities in County Kildare, as follows:

1. Andrew Halting Site, Athy (6 Bays);
2. Andrew Meadows Group Housing Scheme, Athy (6 houses);
3. Blacklion, Maynooth (3 bays, 8 houses); and
4. Tankardsgarden, Newbridge (3 bays).

The Traveller accommodation need assessment and delivery figures set out in Table 77 includes an ambitious target of 28 additional Traveller specific accommodation units over the lifetime of this Traveller Accommodation Programme. The additional Traveller specific accommodation will be provided in line with the following identified need:

Tankardsgarden, Newbridge

This development was to comprise the delivery of 8 mobile home bays and associated ‘day houses’, to be allocated on a phased basis. However, in the Irish Human Rights and Equality Commission report titled ‘An account of the Equality Review carried out by Kildare County Council in respect of Traveller-specific accommodation’, published 2021, it is reported that the Tankardsgarden project will not be proceeding. Kildare County Council, Housing Authority, confirmed this is still the case due to significant erosion of land along the banks of the River Liffey, which runs alongside the site. Currently, the Tankardsgarden site comprises 1 bay and 1 caravan.

Athy

Through the consultation undertaken for the TAP 2019-2024, it has been established that there are two distinct family groups who have expressed a preference for group housing accommodation.

Group One is comprised of five larger families who have a preference for larger accommodation to suit the needs of their families. These families have also requested transfers so as to source larger accommodation however; a group housing development would be their preference.

Group Two is comprised of married couples with smaller, but growing families and who are in need of long-term accommodation to suit their family needs. Both families are indigenous to Athy with strong local connections.

Naas

A need has been identified in Naas for a group housing scheme for a family group comprising five families.

Celbridge

The consultation demonstrated that there is a need for additional Traveller specific accommodation in north Kildare. To this end, Kildare County Council will aim to deliver a group housing scheme in Celbridge.

6.5 International Protection Applicants

Reception services for International Protection applicants refers to a range of services offered to persons who have applied for an International Protection status (refugee or subsidiary protection) or for a permission to remain in the country.

These services, including accommodation provision, are offered to persons who do not have the means to provide for themselves. The services are provided by a range of government departments and agencies and are commonly known as Direct Provision.

Under EU and International Law, Ireland is obliged to examine the claim of any person who arrives into Ireland and claims International Protection. While that claim is being examined by the Department of Justice, International Protection Accommodation Services (IPAS) offers accommodation and related services to International Protection applicants who wish to accept the offer of accommodation from the Irish State.

Accommodation for international protection applicants is administered and managed through the International Protection Accommodation Services (IPAS), a section of the Department of Children, Equality, Disability, Integration and Youth. In County Kildare, there are two centres of accommodation for international protection applicants, details of which are shown in Table 78 below.

	Contracted Capacity	Current Capacity (21/12/2020)
Accommodation Centre, Eyre Powell Hotel, Main Street, Newbridge	152	117 (18/11/2020)
Accommodation Centre, Hazel Hotel, Monasterevin	143	76 (21/12/2020)

Table 78 - Accommodation Centres in County Kildare for International Protection Applicants
(Source: International Protection Accommodation Services (IPAS))

In June 2021, the Department of Children, Equality, Disability, Integration and Youth, published the 'White Paper to End Direct Provision and to Establish a new International Protection Support Service'. The White Paper outlines how the government plans to establish a new system for accommodation and supports for International Protection applicants.

Under the new system, people who are applying for protection will be helped to integrate into Irish life, with health, housing, education, and employment supports at the core of the system. Under the new system, when people arrive in Ireland seeking International Protection, they will stay in one of a number of new Reception and Integration Centres for no more than four months. These centres will be newly built and will be operated by not-for-profit organisations on behalf of the State.

After four months in a State-owned centre, the intention is that applicants will move into own-door accommodation provided through a mix of urban renewal and community hosting schemes as well as by Approved Housing Bodies (AHBs). A means-tested rent will be paid by applicants for this accommodation.

6.6 Third Level Students

Students are an increasingly important part of the housing landscape in Kildare, particularly in Maynooth. According to Census 2016, 20,559 residents of Kildare County reported their principle economic status as students (12.2% of all those aged 15 and over). Referring to Figure 26, the main concentration of students is in Clane-Maynooth MD (16.1% of all those aged 15 and over).

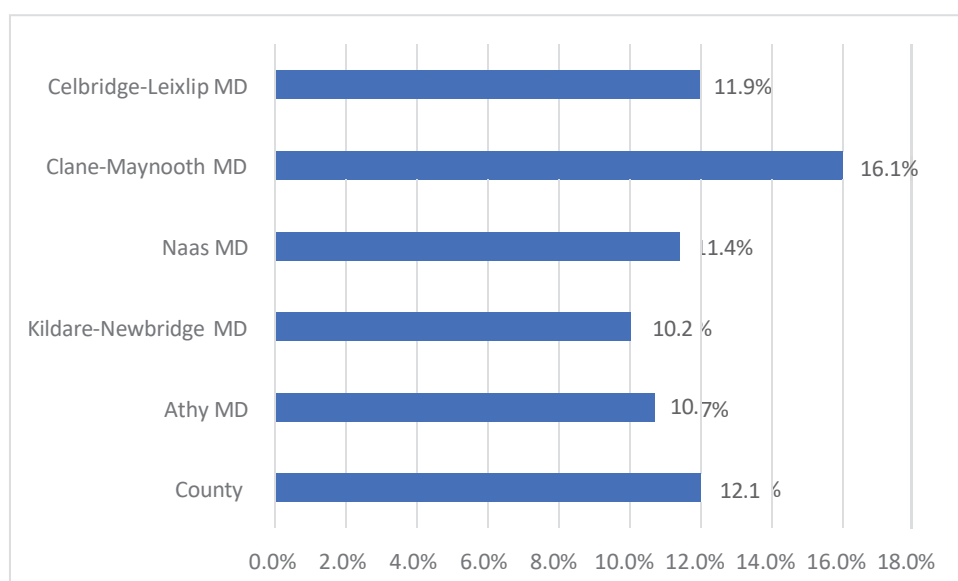


Figure 26 - No. of Students as a percentage of total population 15 years and over, Census 2016

Taking a deeper look at the Clane-Maynooth MD, and referring to Figure 27, shows that 25.3% of the population of Maynooth town over the age of 15 are students, compared to an average of c. 11% for the other towns within the vicinity, including Leixlip and Kilcock which are connected to Maynooth via a rail line.

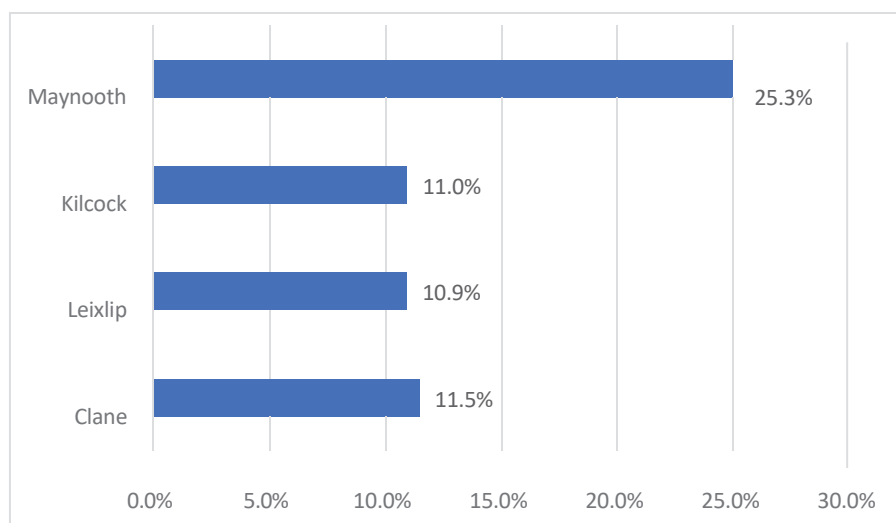


Figure 27 - No. of Students as a percentage of total population 15 years and over, Census 2016

Maynooth University is the only third level institution in County Kildare. The university has a total enrolment of 13,700 students comprising around 11,450 undergraduates and 2,240 postgraduate-level students.

Maynooth University received its highest-ever number of applications for admission in September 2021. Almost 17,000 applicants applied to the University, according to figures released by the Central Applications Office (CAO), an increase of 12% year on year. In a press release dated 14th July 2021, the University states that it plans to admit more than 3,500 students in the 2021/2022 academic year. Represented in Figure 28, this figure follows the trend of new entrants to the university over the last number of years.

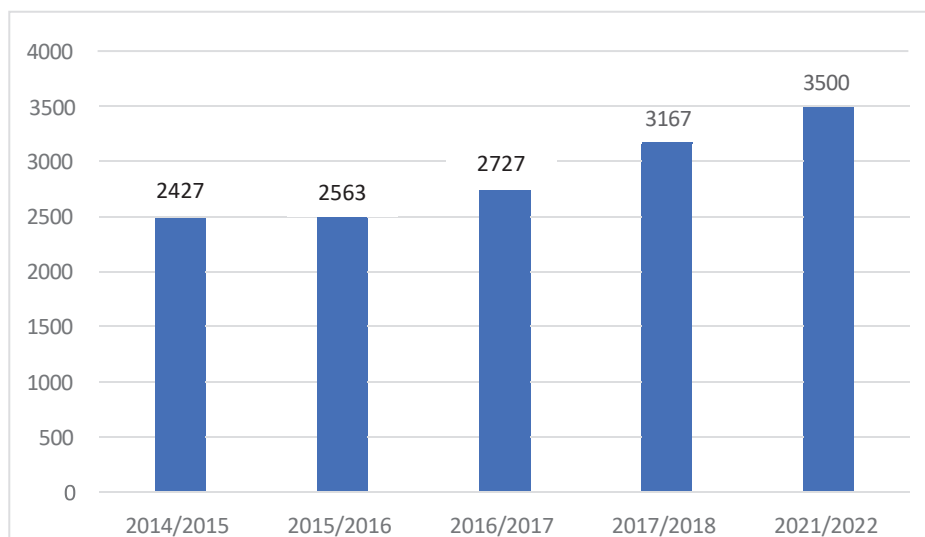


Figure 28 - New entrants to Maynooth University (Source: HEA / Maynooth University)

On foot of planning permission Ref. 18922, construction of a two- to four-storey academic building of c. 10,554sq.m gross floor area, commenced in August 2019, and includes new teaching spaces. The planning application documentation reported that it is envisaged that the student numbers at the university would increase to 14,500 by 2022. As a result, demand for student housing can be expected to increase accordingly in Maynooth and perhaps in the adjacent towns of Kilcock and Leixlip, up to and beyond these years.

7. Policy Objectives to deliver the Housing Strategy

Based upon the analysis of the existing housing market in Kildare, and the projection and/or estimation of housing needs and demands, the following section provides the housing objectives that inform the overall approach to the housing strategy within the County. These relate to general housing objectives, relating to social housing and the provision of specific housing needs.

7.1 Housing Strategy Key Principles

The overarching purpose of a housing strategy is to ensure that the proper planning and sustainable development of a county provides for the housing of the existing and future population of the county in an appropriate manner. The Council will seek to address the key principles set out below in its Core Strategy, and related policies and objectives for the delivery of sustainable housing.

1. To deliver the estimated population targets as set out in the NPF and RSES, having regard to the settlement hierarchy for the County as set out in the Kildare County Development Plan.
2. To implement approved Local Area Plans (LAPs) to drive the delivery of sustainable, dynamic urban centres, in line with the settlement strategy.
3. To supporting the Metropolitan Area Strategic Plan (MASP) which seeks the sustainable development of the Dublin Metropolitan Area.
4. To ensure that public or private sector developments will have a mix of housing types and sizes to reasonably match the requirements of different kinds of households, including the special requirements of older people and people with disabilities, the provision of affordable houses, cost rental housing and social rental housing to cater for all levels of household affordability in the County.
5. To reduce vacancy through a range of measures including re-use of existing buildings, infill development schemes, and regeneration, particularly in opportunity sites.
6. To prioritise residential development on undeveloped or underutilised lands, zoned for residential uses or for a mixture of residential and other uses, located within and adjacent to established residential areas within towns and villages in order to consolidate the built-up area of towns and villages.
7. To promote inclusivity between people of different social backgrounds in order to create socially balanced and sustainable communities within all housing areas across County Kildare.

7.2 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 94(1) requires that a Planning Authority's Development Plan shall include objectives in order to secure the implementation of the Housing Strategy. These objectives should relate to:

- The existing and likely future housing need, as identified in the HNDA; and the requirement for public or private sector developments to provide the necessary provision of social rental housing, affordable houses (affordable purchase and / or cost rental housing) and to cater for all levels of household affordability in the County.
- The need to provide different types and sizes of housing, to match demand
- The special needs of the elderly and those with disabilities which must be provided for; and
- The need to counteract social segregation in the provision of housing.

This Housing Strategy sets out the objectives, which are to be incorporated into the respective plans of Kildare County Council.

7.2.1 General Housing Objectives

It is the objective of the Council: **NPF / RSES / MASP**

- To secure the implementation of the Kildare County Housing Strategy in accordance with the provision of national legislation and relevant policies and standards.
- That new housing provision over the strategy period will deliver compact and sustainable growth in the towns and villages in the County, seeking to support urban renewal, infill and brownfield site development and regeneration, to strengthen the roles and viability of the towns and villages, including the requirement that at least 30% of all new homes in settlements be delivered within the existing built-up footprint.
- To co-operate with the Eastern and Midland Regional Assembly in planning for new homes and meeting housing needs for the Dublin Metropolitan Area (which includes Maynooth, Leixlip, Celbridge, and Kilcock) through the implementation of the Dublin Metropolitan Area Strategic Plan.

Proper Planning and Sustainable Development

- To encourage the establishment of sustainable residential communities by ensuring that an increased variety of housing and apartment types and sizes are provided within the County. Planning applications for multiple housing units will be required to submit a Statement of Housing Mix detailing why the mix proposed is considered appropriate in meeting the needs of an area.
- To ensure that sufficient zoned land is available at appropriate locations to cater for the envisioned population growth within the County and to satisfy residential development needs within the County in compliance with the Core Strategy and Settlement Strategy of the Development Plan, and to meet the likely future housing demands and needs identified in the Housing Strategy and HNDA.

Social and Affordable Housing

- To meet the county's housing need for social housing provision through a range of mechanisms, including Part V of the Planning and Development Act 2000 (as amended), a social housing building programme, acquisition, leasing, the Housing Assistance Payment (HAP) scheme, the Rental Accommodation Scheme (RAS) and the utilisation of existing housing stock.

- Kildare County Council will require that 20% of (i) lands zoned for residential use, or for a mixture of residential and other uses, in respect of which permission for the development of 5 or more houses is granted, and (ii) any land which is not zoned for residential use, or for a mixture of residential and other uses, but in respect of which permission for the development of 5 or more houses is granted, shall be reserved for the provision of social housing, affordable housing and cost rental housing; with at least half the 20% to be used for social housing support, and the remainder to be used for affordable housing, which can be affordable purchase, cost rental or both.
- In accordance with Section 94(4)(a) of the Planning and Development Act 2000 (as amended), the estimate of the amount of social housing, affordable housing and cost rental housing required in the area of the development plan during the period of the development plan may state the different requirements for different areas within the area of the development plan. In this regard, the composition of the 10% Part V reservation for affordable homes, be it affordable purchase, cost rental, or both, and / or part social housing, shall be decided on a case-by-case basis of individual site assessment.
- Where (i) planning permission was granted before 1 August 2021, or (ii) where land was purchased between 1 September 2015 and 31 July 2021 in respect of which a planning permission was granted between 3 September 2021 and 31 July 2026, Kildare County Council will require that 10% of lands zoned for residential use, or for a mixture of residential and other uses, in respect of which permission for the development of 5 or more houses is granted, shall be reserved for the provision of social housing.
- To facilitate the maximum allowable provision under the Planning Act (as amended) for affordable and social housing provision as part of future planning permissions, reflecting the high levels of demand within the County.
- Having regard to the findings of the HNDA, and in accordance with Section 94(4)(a) of the Planning and Development Act 2000 (as amended), the Housing Strategy of the Kildare County Development Plan 2023-2029 will include an estimate of the amount of social housing, affordable housing and cost rental housing required in the area of the development plan during the period of the development plan and the estimate may state the different requirements for different areas within the area of the development plan.
- To support Government's affordable housing initiatives, including the Affordable Purchase Scheme and First Home / Share Equity Scheme, introduced by the Affordable Housing Act 2021.
- 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, new models of cost rental and affordable homeownership and co-operative housing.

Urban Renewal

- That new housing delivery over the strategy period will support urban renewal and urban regeneration and will strengthen the roles and viability of the towns and villages in the County. Kildare County Council, through the County Development Plan, will support the delivery of housing on brownfield and infill sites in towns and villages in the County.

- To promote the transformation of key brownfield sites and identified regeneration areas into successful socially integrated neighbourhoods and promote area regeneration in parts of the urban centres which require physical improvement and enhancement in terms of quality of life, housing and employment opportunities and to ensure a balanced community is provided in regeneration areas.

Vacant / Derelict Houses

- To support the renovation and re-use of obsolete, vacant and derelict homes, through the following measures:
 - a. Support Government programmes and incentives to bring empty homes into use through various means, including potential expansion of the Town and Village Renewal Scheme as referred to in the Government’s Rural Development Policy 2021-2025.
 - b. Maximise the effective use of local authority housing stock and minimise local authority housing stock vacancy, including through effective refurbishment and retrofitting of older stock where appropriate.
 - c. Promote the conversion of vacant properties into new social and affordable homes through schemes including the Repair and Leasing Scheme, the Buy and Renew Scheme, and long-term leasing. Kildare County Council will endeavour to promote these schemes and encourage owners of vacant properties to avail of these schemes, directly or in co-operation with Approved Housing Bodies.

Unfinished Housing Estates

- To continue to work with developers and residents of private residential developments, where possible, to address public safety and environmental / infrastructural issues within Unfinished Housing Estates.

Rural Housing

- To plan for the sustainable provision of single housing in the countryside in accordance with the NPF through the Kildare County Development Plan, having regard to the need for single housing in the countryside as set out in the HNDA as well as existing and forthcoming national and regional policy and guidance and the viability of smaller towns and rural settlements.

Lifetime Adaptability

- To support high-quality design in new housing and to promote housing that is attractive, safe, and adaptable to the needs of existing and future households. Kildare County Council will support innovative construction methods to deliver sustainable and adaptable housing.

Climate Change/Climate Resilient Kildare

- To promote the design and delivery of environmentally sustainable and energy efficient housing, including through the refurbishment and upgrading of existing stock.
- To support housing design that contributes to climate resilience and climate mitigation, including innovative low carbon construction methods and the reduction of embodied energy in newly built homes, in line with Goal 3 of the Kildare County Council Climate Change Adaptation Strategy 2019 – 2024.

7.2.2 Social and Specific Housing Objectives

In relation to social and specific housing, including Traveller accommodation, older people, people with a disability, homeless, international protection applicants and third level students, it is the policy of the Council:

Older People

- To support the delivery of housing options to meet the needs of older people and support older people to live independently where possible.
- To support the provision of specific purpose-built accommodation, including assisted living units and lifetime housing and adaptation of existing properties, which will include opportunities for 'downsizing' or 'right sizing' within communities.
- Support the concept of independent living for older people within their community and ensure, where possible that such accommodation is integrated with mainstream housing.
- To support the implementation of the Kildare Age Friendly County Strategy 2019-2021 (and any subsequent strategy), promoting the delivery of Lifetime Homes and will support the provision of housing that is adaptable for an ageing population. The Council will also support and promote the delivery of specialist accommodation appropriate to the needs of older people in co-operation with the voluntary sector, AHBs, the HSE, and other relevant bodies.
- To engage the Approved Housing Bodies with responsibility for housing for older people to develop accommodation in town centres more suited for those with reduced mobility.

People with a Disability

- Support access, for people with disabilities, to the appropriate range of housing and related support services, delivered in an integrated and sustainable manner, which promotes equality of opportunity, individual choice and independent living.
- To support and provide housing that meets the diverse needs of people with disabilities and to implement the County Kildare Access Strategy - A Universal Access Approach 2020-2022 (and any subsequent reviews and plans). The Council will support and promote the principles of Universal Design in new and refurbished housing and in community buildings in the County.
- To ensure and monitor that 10% of acquired housing stock meets the needs of those with a disability (dependent on market availability) and 12% of Kildare County Council new builds are suitable for those with a disability.
- To support and direct funding into the provision of specific purpose-built accommodation, including assisted/ supported living units, lifetime housing, and adaptation of existing properties.
- To require that a minimum of 10% of dwellings in all schemes over 100 units are designed to accommodate people with disabilities and older people in accordance with the Universal Design Guidelines for Homes in Ireland 2015

Student Accommodation

- To support the provision of purpose-built student accommodation in appropriate locations and of appropriate design (including adequate communal facilities and external communal space) as set out in the County Development Plan, to meet demand for student housing in accordance with the National Student Accommodation Strategy.

- Where sites are developed for student accommodation, the portion of the site relating to this will be exempt from the social and affordable housing requirements of Section 96(1) of the Planning and Development Act 2000 (as amended). Applications for change of use from student housing to any other form of housing will be resisted without adequate demonstration that an over-provision of student housing exists.
- To support increased supply of student accommodation in Maynooth, Kilcock and Leixlip, to meet the anticipated student accommodation demand generated by Maynooth University.

Homeless

- To support means of preventing homelessness and providing pathways out of homelessness for households, working in co-operation with public and voluntary bodies.

Traveller Accommodation

- To support the delivery of the Kildare County Council Traveller Accommodation Programme 2019- 2024 (and any superseding programmes agreed by the Council) in accordance with the principles of proper planning and sustainable development.
- To implement the delivery targets of the Kildare County Council Traveller Accommodation Programme 2019- 2024 (and any superseding programmes agreed by the Council) including to identify and develop sites for Traveller specific group housing in the settlements of Naas, Celbridge and Athy, and/or the greater Municipal Districts, to provide accommodation appropriate to the identified needs of members of the Traveller community.
- To recognise the separate identity, culture, tradition and history of the Travelling people and to reduce the levels of disadvantage that Travellers experience.

International Protection Applicants

- To continue to work with Central Government and relevant State Agencies to support the provision of housing for International Protection Applicants (asylum seekers/ refugees) in Kildare.

7.3 Monitoring & Implementation

The Planning and Development Act 2000, (as amended), provides for the monitoring of the implementation of the County Housing Strategy as part of the Report of the Chief Executive under Section 15(2). In this respect, the council will undertake the following:

- Review the progress achieved in implementing this Strategy and in consultation with the appropriate bodies
- Seek to work with the DHPLG in line with RPO 29 Rebuilding Ireland and RPO 30 HDNA with respect to guidance on monitoring and will seek to incorporate guidance into the current housing needs monitoring programmes of the Council in due course

In terms of an overall approach, the Council will seek to promote the implementation of the Housing Strategy in a rational and sequential manner as well as ensuring that essential facilities, such as roads infrastructure, water and sewerage, are secured and provided in conjunction with proposed developments and in line with the pertaining legislation and best practice.

As far as practicable, the Council will implement a monitoring programme for the HNDA and Housing Strategy as part of the Implementation and Monitoring Framework (refer to Chapter 16 and Appendix 12 of the Plan). As outlined in Chapter 16 of the Plan, the Council is committed to pursuing an active monitoring strategy for the Development Plan and to provide the Development Plan Team with the necessary technical supports, including the development of a 'live' (recently updated) Geographical Information System (GIS) and database on development information which will assist in the collation and dissemination of the most up-to-date statistics to support the reporting of information regarding spatial development within the county. Such data will be sourced from the Council's existing monitoring systems (planning register, social housing delivery statistics, etc.) along with national monitoring programmes managed by organisations such as the Central Statistics Office, the Environmental Protection Agency, and others.

A review of the Housing Strategy, within two years after the making of the Development Plan, is required to ensure its successful implementation. The Chief Executive will give a report to members on the progress achieved in implementing the Housing Strategy and the Development Plan objectives. The Housing Strategy may be amended, and the Development Plan varied accordingly if the report prepared by the Chief Executive identifies new or revised housing needs within the functional area of the Local Authority.