

# Cherrywood SDZ Planning Scheme

Cherrywood Town Centre and Environs Employment Review (HIE - High Intensity Floorspace)

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# 1. INTRODUCTION

## 1.1 Project Background

MacCabe Durney Barnes has been commissioned by DunLaoghaire Rathdown County Council to prepare a review of the High Intensity Floorspace policy in the Cherrywood Strategic Development Zone (SDZ) Planning Scheme.

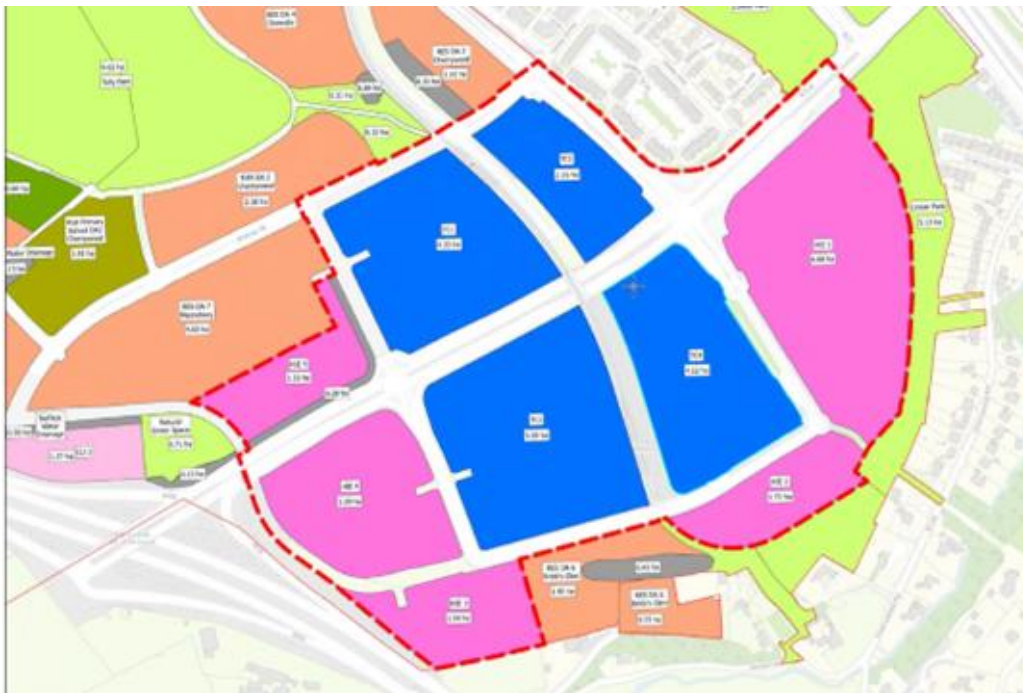
The project brief is to undertake a review of the function, quantum, spatial distribution, and built form of planned employment floorspace (“High Intensity Employment”) provision within Cherrywood Town Centre and environs.

This review will form part of a broader plan-led review of the Town Centre and environs, as follows:

*‘The Local Authority will undertake a plan led review of the Town Centre and Environs having regard to the overall Vision and Principles for Cherrywood and appropriate Government policy, to ensure that the Town Centre functions as a vibrant, mixed use sustainable District Centre at the heart of Cherrywood. This review will seek to ensure an appropriate mix, quantum and phasing of uses to secure a balance of employment, commercial, retail, residential, community and social uses. It is an objective of the Council to use its best endeavours to undertake this plan led review within twelve months from the date that the proposed Amendment No. 8 comes into effect.’*

(As per Approved Building Heights and Density Review Amendment (No. 8) of the Cherrywood SDZ Planning Scheme, 2014, as amended.)

Figure 1 below illustrates the extent of the area that is subject to review.



**Figure 1 Town Centre and environs study review area**

## 1.2 Aims of the Review

The current Planning Scheme and Cherrywood Town Centre Urban Form Framework (UFDF) supports the provision of between 82,800 sqm and 109,000 sqm of additional High Intensity Employment commercial floor area in the Town Centre. A further 2,150 to 3,000 HIE floorspace is provided for in the surrounding Village Centres.

The purpose of the project is to review the planned employment floorspace (“High Intensity Employment”) provision within Cherrywood Town Centre and environs, including the most appropriate scale, nature, and spatial arrangement of such uses.

Key aims of the Review include, but are not limited to:

- To provide for an appropriate and sustainable mix and quantum of employment provision and employment densities.
- To ensure an appropriate and sustainable balance of employment uses in Cherrywood Town Centre alongside other town centre uses such as retail, community, social, healthcare, and residential.
- To provide for an appropriate and sustainable spatial arrangement of employment uses proximate to public transport, residential uses, retail and other supporting services, with good linkages to neighbourhoods, and having regard to peak hour trip generation.
- Enhance the employment profile of the Cherrywood Town Centre and environs, consistent with established policy.
- To support the development of an appropriate and sustainable built form, having due regard to layout, urban form and function, as well as to good placemaking principles to achieve a cohesive, coherent and integrated Town Centre and environs.
- Maintain consistency with the established Vision, Principles, Themes, and Specific Objectives of the Cherrywood Planning Scheme, 2014, as amended.
- To have due regard to established infrastructure and Phasing & Sequencing requirements of the Cherrywood Planning Scheme, and advise on appropriate Phasing & Sequencing requirements for Cherrywood in relation to high intensity employment going forward.
- Maintain consistency with the County, Regional and National Planning and policy and guideline contexts.
- Recommendations will be expected to be developed alongside, and feeding into, parallel workstreams (e.g., relating to retail uses, residential supply, social infrastructure, urban design, and in particular to transport and water infrastructure) which together are intended to inform a broader plan-led review of the land uses and built form of Cherrywood Town Centre and its environs.

### 1.2.1 Outputs

The output of the Review seeks to address the following:

- Review of national, regional and local economic, employment and planning policy, with particular regard to spatial policy for employment uses.
- Review of current economic and employment context, and emerging trends in higher density employment.



- Analysis and advice in relation to current market trends and demand for/supply of employment floorspace.
- Analysis and advice in relation to trends and outlook regarding flexible working arrangements.
- Assessment of labour force changes and jobs ratio relevant to Cherrywood.
- Assessment of Cherrywood employment land supply in context of County and wider Region.
- Review of existing floorspace, employment development profile and built form within Cherrywood Town Centre and environs, including the potential for intensification (or de-intensification) of relevant employment lands.
- A qualitative and quantitative assessment of relevant data and of future employment floorspace needs in Cherrywood Town Centre and environs.
- Assessment specifically as to whether High Intensity Floorspace is required within Cherrywood Town Centre (i.e., the four Town Centre Quadrants).
- Provision of sectoral analysis, including review and recommendations in relation to the most appropriate sectors for (a) Cherrywood Town Centre to support the establishment of a successful strategic employment location and (b) its environs (HIE land use zoned lands) to support the establishment of a vibrant Town Centre.
- Assess and advise on the potential for synergies and clusters, including specific recommendations exploring the potential for the creative / arts sector, small & medium enterprise sectors, and the knowledge intensive business service sector in Cherrywood Town Centre and its environs.
- Assess and advise on the most appropriate and sustainable provision and spatial arrangement of supporting uses.
- To advise in relation to sensitivity and spatial distribution of higher density employment uses relative to public transport and location, having regard to the Town Centre and environs areas.
- Assessment of Options for the most appropriate and sustainable nature, scale, mix of uses, spatial distribution and arrangement of uses, layout, and built form for Cherrywood Town Centre and its environs, with particular regard to dedicated employment development,
- Preferred Options and recommendations for Cherrywood Town Centre and environs.
- Review of proposals for Cherrywood Town Centre and its environs, as pertains to non-statutory public consultation, as applicable.
- Recommendations for relevant sections of the Cherrywood Planning Scheme relating to employment within Cherrywood Town Centre and environs
- Consideration of adaptable town centre buildings, units and spaces.
- Consideration of the Circular Economy.

### 1.3 Overall Approach

The overall approach and methodology adopted effectively seeks to assess the gap between supply and demand over the period of the Planning Scheme (e.g. 15-20 years). This review is being able to analyse the progress of the scheme to date and consider real-world challenges and opportunities for HIE objectives in terms of policy, quantum and spatial distribution. An outline of the overall approach is detailed in Figure 2 below.



The methodology will also consider the need to integrate the requirement to create a viable multi-functional district centre.

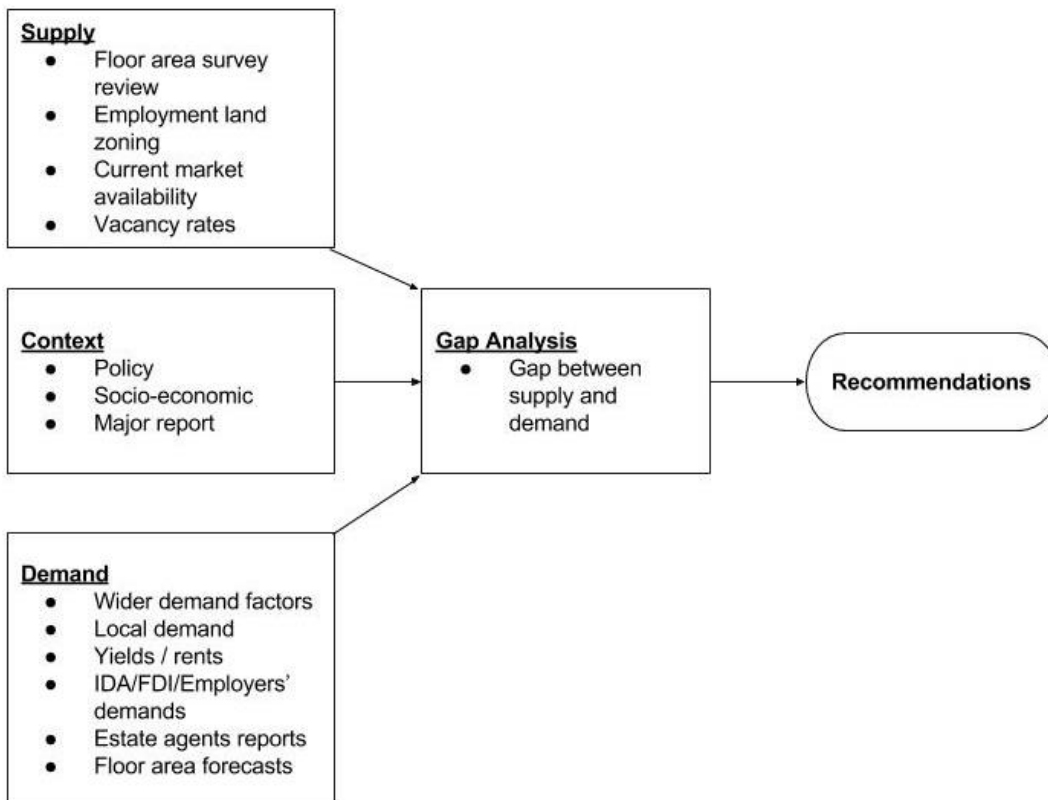
The methodology will also consider the need to integrate the requirement to create a viable multi-functional district centre. A successful commercial quarter is integral to the overall vision.

Analysis of (HIE) provision will consider measures/adjustments that enable /support commercial investment and viability

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Analysis of (HIE) provision will consider measures/adjustments that enable /support commercial investment and viability.

The principal output of the report will be to provide a gap analysis, identification of overall function, quantum, spatial distribution and built form of planned employment floorspace (HIE) provision within the Cherrywood Town Centre.



**Figure 2: Employment Study Approach**

### 1.3.1 Tasks

The tasks involved are as follows:

- Meeting with Cherrywood SDZ Development Agency Project Team to confirm scope of review;
- Review current policy context including the DunLaoghaire Rathdown County Development Plan 2022-2028, the current Cherrywood SDZ Planning Scheme and the Cherrywood Town Centre Urban Form Framework (UFDf) and Development Plan–Guidelines for Planning Authorities (2022), Future Jobs Ireland (March 2019) Powering the Regions: Enterprise Ireland Regional Plan (2019); LECP 2023-28 and DLR Local Economic and Enterprise development Plan 2021-24;
- Data Analysis including labour force changes and jobs ratio relevant to Cherrywood (including consideration of Census 2022 POWSCAR due to be released on 19<sup>th</sup> October);
- Comparative analysis of similar centres in the Greater Dublin Area.
- Review potential impact of major infrastructure projects;
- Supply assessment having regard to
  - Any available land use or floor area survey information
  - Committed and constructed development since 2014
  - Employment land use zonings
  - Current market availability
  - Vacancy rates
- Demand assessment having regard to
  - Wider demand factors
  - Local demand factors
  - IDA/FDI/employer demands
  - Yields/rents
  - Estate agent reports
  - Floor area forecast
- Gap analysis between supply and demand
- Engage with other consultants on parallel workstreams (retail, residential supply etc)
- Recommendations for relevant sections of the Cherrywood Planning Scheme relating to employment
- Meet to consider the findings and revise as required

### 1.4 Limitations of the Study

It is important to recognise the limitations of the study, as the process is not an exact science. The assessment will allow for a broad appraisal of the potential for employment related floorspace. It must

be emphasised that there are a wide range of local, regional and indeed international factors that will impact upon the potential to attract and cater for employment generating land uses in the area. A number of assumptions may materialise over the course of implementing the Planning Scheme over a 15-20 year timeframe, while others will not. In addition, there will be unforeseen factors which can have a significant impact upon the demand and supply of the floorspace. The study should only therefore be used a tool in assisting in the identification of the employment floorspace demands for the Planning Scheme. The study is based upon information collated for a particular point in time.

## 1.5 Structure of the Report

The report is structured in the following manner:

- **Section One** is the introduction.
- **Section Two** defines the study area and terminology.
- **Section Three** sets the context for the study with a review of the existing relevant policies at national, regional and county level.
- **Section Four** provides a socio-economic profile and characterisation of the area.
- **Section Five** considers the property market with reference to supply and demand issues.
- **Section Six** establishes floorspace forecasts having regard to employment forecasts, property market trends and pipeline developments.
- **Section Seven** outlines the principles and a vision to guide the Review and main conclusions and recommendations.

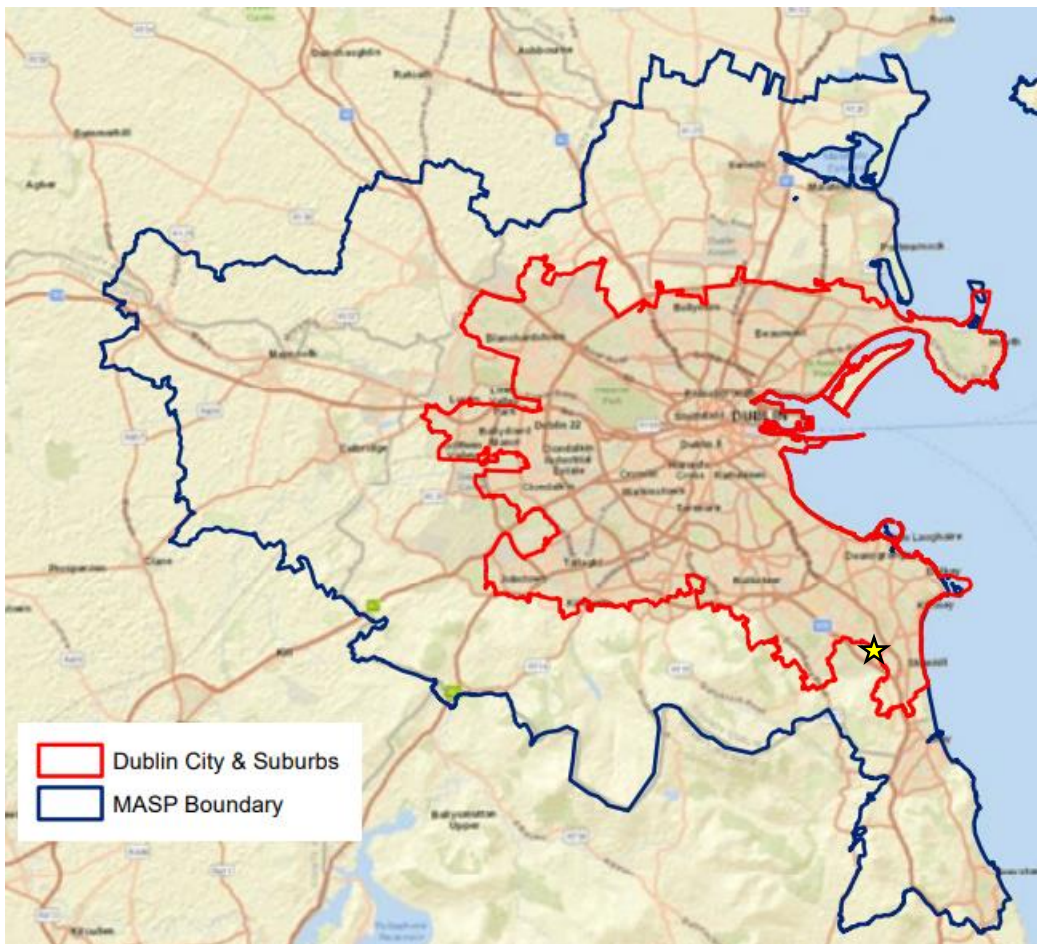
## 2. THE STUDY AREA

### 2.1 Introduction

The HIE employment review considers the topic within the context of the Cherrywood SDZ and broader regional market context in which the area is located.

- Cherrywood Environs
- Dublin Region – Workforce and competing centres and Strategic Development Zones

The Dublin Region acts a single market for the purposes of the office and employment market. However, there are clear spatial sub-sectors (e.g. city centre, Docklands, suburban). These will serve the needs of different occupiers. The Regional Economic Spatial Economic Plan identifies the area is on the southern edge of Dublin City and Suburbs and located within the wider Metropolitan Area Boundary.



*Figure 3 Location of Cherrywood within Dublin and MASP areas*

The MASP Plan (Table 5.2) also outlines the main employment development areas within the Metropolitan areas. The table includes industrial land concentrations, IDA strategic sites as well as city centre regeneration zones.

**Table 1 Strategic Employment Development Areas in the Dublin Metropolitan Area**

<b>TABLE 5.2 Potential of Strategic Employment Development Areas in the Dublin Metropolitan Area</b>		
<b>Strategic corridor</b>	<b>Strategic Employment locations</b>	<b>Employment potential</b>
<b>Docklands and City centre</b> (Multi-modal)	Docklands, Poolbeg and north east inner city	High tech, financial services and people intensive employment and regeneration of underutilised lands
	City centre (Grangegorman and St James-Diageo lands)	Re-intensification and regeneration of underutilised lands, employment opportunities related to education and hospital campus development
	Industrial lands	Re-intensification of older industrial lands subject to feasibility
<b>North-South corridor</b> (DART)	North County Wicklow (Bray, extension to Fassaroe, Greystones)	Re-intensification of commercial town centre functions and new mixed-use district. Redevelopment of IDA strategic sites at Greystones to strengthen employment base for North Wicklow
<b>North-West corridor</b> (DART/Maynooth-Dunboyne commuter line)	Dublin Enterprise Zone (Dublin 15)	Large scale office, research and development and high tech manufacturing in proximity to Blanchardstown IT
	Dunboyne employment lands	Space intensive 'big box' employment at Portane. Mixed use development at M3/Parkway
	Leixlip employment lands	Large scale former Hewlett Packard site and Collinstown site for regional enterprise to strengthen employment base for North Kildare
	Maynooth Research & Technology Park	New technology and research and development employment related to synergies with Maynooth University
<b>South west corridor</b> (DART /LUAS redline)	Naas Road/Ballymount lands	Potential for intensification of industrial lands and development of new mixed-use district
	Tallaght Town Centre /Cookstown	Potential for intensification of industrial lands and development of a new mixed-use district
	Grange Castle Business Park	Space intensive uses e.g. IT, research, pharmaceuticals in a campus style setting
<b>Metrolink / LUAS Green line Corridor</b>	South County Dublin (Cherrywood, Ballyogan and Sandyford)	Mixed-use districts with significant retail and people intensive employment to complement city centre and docklands
	Swords and Dublin Airport/South Fingal	Future employment locations and airport related and commercial facilities in Swords and Dublin Airport/South Fingal

**Source: Eastern & Midland Regional Assembly, Regional Spatial & Economic Strategy 2019-2031 (Table 5.2)**

The employment lands in Cherrywood clearly sit within a competitive regional market, where its function and competitive advantage is considered relative to opportunities in other sites and locations.

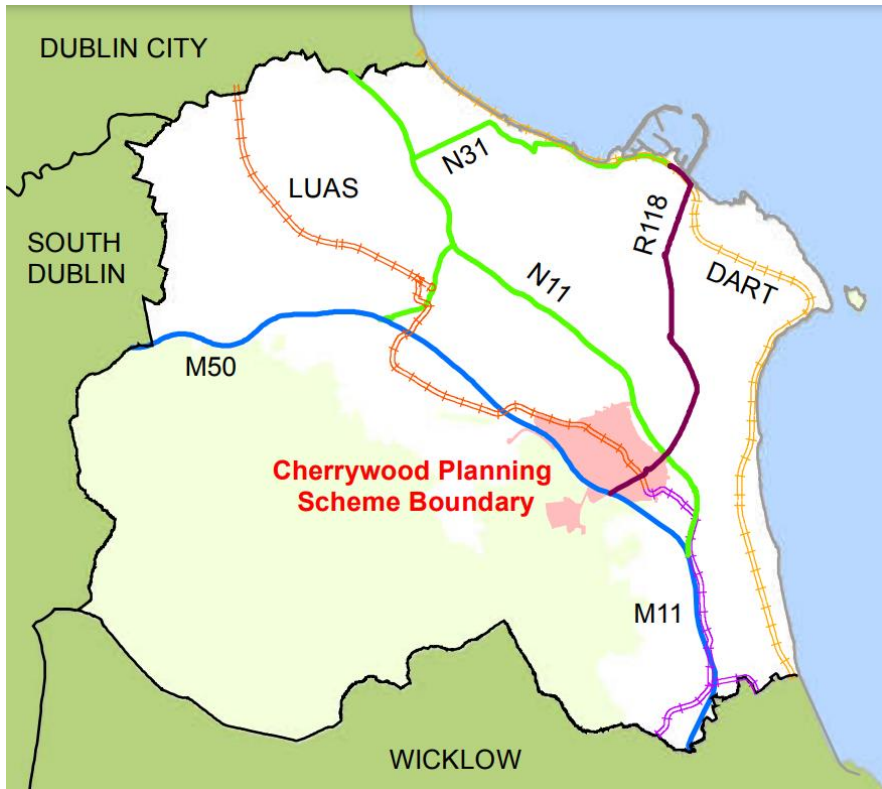


It is also useful to place the Cherrywood SDZ within the context of the 7 overall SDZ's within Dublin City and Suburbs. The first SDZ planning scheme was adopted in 2003 in Adamstown. The key purpose of SDZs as defined in the early 2000s was to enable the fast track delivery of new residential and non-residential development in locations of strategic importance in the Greater Dublin Area. The schemes for Cherrywood and Dublin Docklands adopted in 2014 had a greater emphasis on employment than the other areas.

Cherrywood is strategically located between the M50 and the N11, with the last four Luas stops on the Green line running through it. As a designated large growth town within the Dublin Metropolitan Area, it is expected to accommodate significant new investment in transport, in economic and commercial activity as well as in housing.



Figure 4 SDZs in Dublin City and Suburbs Source: <https://www.dublineconomy.ie>



**Figure 5 Location of Cherrywood Planning Scheme within Dún Laoghaire-Rathdown County Council (Source: Map 1.2 of Planning Scheme Document)**

The defined study area of this review is illustrated in Figure 6 below. The main concentration of HIE lands are located within the Town Centre Quadrants (TC3 and TC4) shown in blue on the map. The study area also include Bride's Glen (HIE1, HIE2) which is generally developed as part of the Cherrywood Business Park. The more peripheral areas of HIE3 and Macnebury (HIE4 and HIE5) are also included. The policy chapter provides a more detailed breakdown of the anticipated floorspace requirements in the planning scheme. Anchor Employers established in Cherrywood (Dell-EMC, Eir-EVO, Aviva, Accenture, APC/Matter Private).



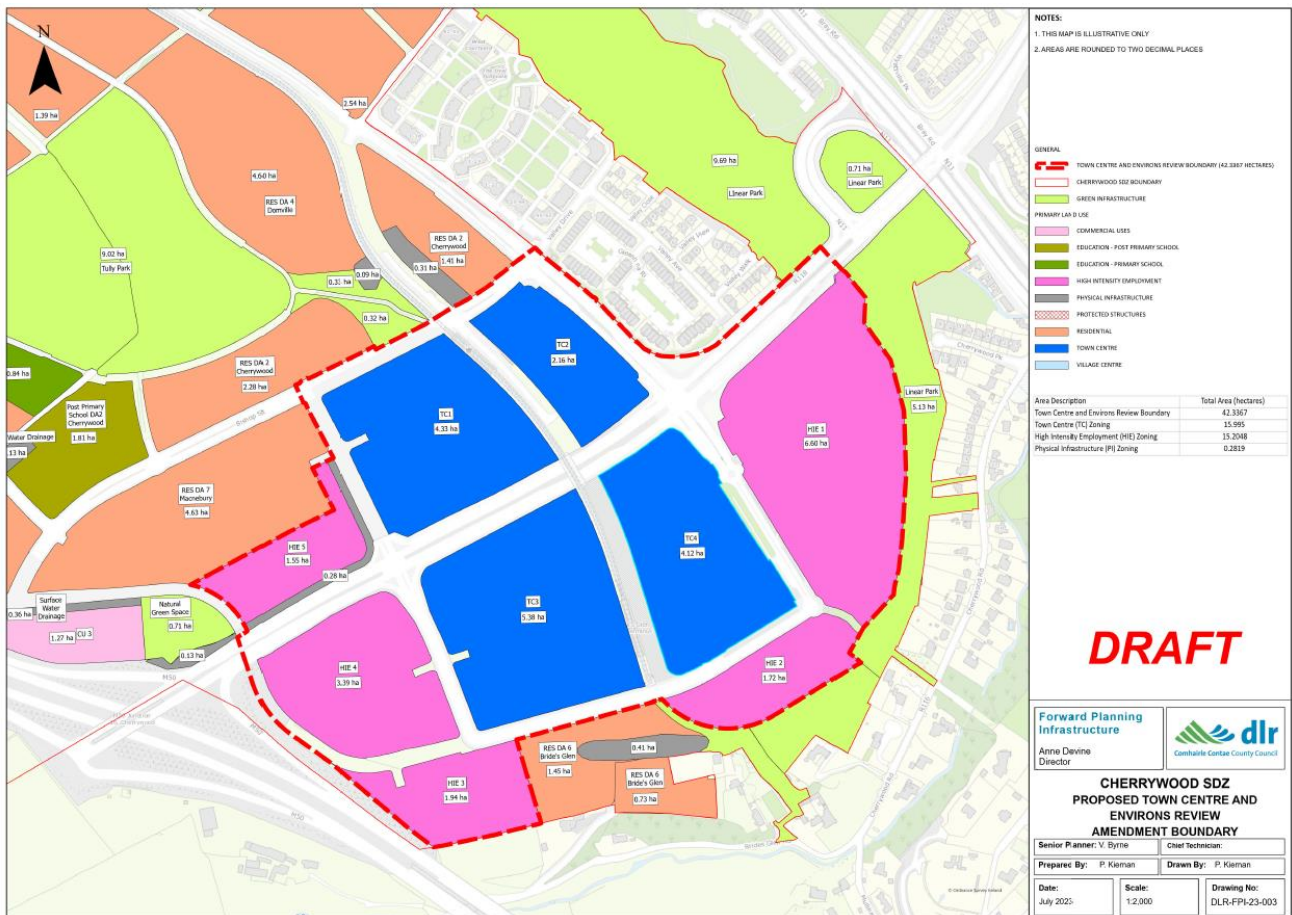


Figure 6 Defined area of Cherrywood Town Centre and Environs Review including zoning for Bride's Glen (HIE1, HIE2 and HIE3) and Macnebury (HIE4 and HIE5)

## 3. POLICY CONTEXT

### 3.1 Introduction

This section considers the policy context for development within the Planning Scheme area. The pertinent sections of the Planning Scheme that refer to HIE and employment are set out in the first instance. These are the planning policies that are the subject of this review.

Relevant strategic policies at a national, regional and county level are subsequently set out, as the factors that influence the review of the scheme.

### 3.2 Cherrywood Planning Scheme

The Cherrywood Strategic Development Zone Planning Scheme was approved by An Bord Pleanála (ABP) in April 2014 in accordance with Section 169 of the Planning and Development Act 2000, as amended, and has been subject to 8 Amendments (Proposed Amendment No. 9 - Relating to Residential Car Parking Standards (Section 4.2.10 of the Approved Planning Scheme, 2014 (as amended) has been submitted to ABP for approval).

Key sections of the Planning Scheme include Sections 1.4; 1.6 Vision for Cherrywood; 1.7 Principles for Cherrywood; 2.2.2; 2.3; 2.5; 2.6; 6.2; 6.6 and 6.7, as well as the Cherrywood Town Centre Urban Form Development Framework (UFDF). These sections are summarised below.

#### 3.2.1 Section 2.2.2 Definition of Primary Land Uses

Definitions of employment land use within the scheme are set out in section 2.2.2 of the Planning Scheme:

##### **High Intensity Employment**

This type of employment generally has a high employee to floor area ratio of c. 1 employee per 20sq.m and usually generates peak hour trips. It will be located centrally in proximity to public transport, retail and other supporting services, with good pedestrian linkages to the residential neighbourhoods.

##### **Town Centre**

The Cherrywood Town Centre will provide a mix of uses in a sustainable and diverse fashion including comparison retail, retail services at a District Centre level and a large convenience outlet. These uses will be combined with high intensity employment and residential development, all built in an urban format. Within the Town Centre particular land uses are clustered so as to ensure the vitality of the centre and to create distinct retail and employment areas.

##### **Village Centre**

The 3 Village Centres will include local retail, retail services appropriate to the size of population they serve, and a local convenience outlet along with modest employment and residential uses. This will provide for compact and vibrant Village Centres, to serve the immediate residential neighbourhood.

##### **Commercial Uses**

These are commercial uses except for retail warehousing, high intensity employment, convenience and comparison retail, which are permitted in the Town and Village Centres.

The planning scheme (as amended) sets out a high level of detail in respect of development quanta by land use and for each of the development areas in the scheme. The proposed minimum and maximum quantum of development and resultant plot ratio are the primary limitations for development on a site.

**Table 2 Cherrywood Planning Scheme Table 2.2: Overall Development Quantum Range (as amended by Amendment 8, May 2021)**

Development Type	(A) Min Quantum	(B) Max Quantum	(C) Development Permitted/Constructed Feb 2012	D=(B-C) Balance Max Future Quantum
Town Centre Sq.m	286,894	362,909	7,247	355,662
Village Centre Sq.m	41,855	<del>61,625</del> 71,925	--	<del>61,625</del> 71,925
High Intensity Employment Sq.m	267,550	350,000	96,000	254,000
Commercial Uses Sq.m	65,000*	--	--	77,000*
Residential	Circa 6,255	<del>Circa 8,786</del> 10,500	Circa 600 units	<del>Circa 9,906</del>
Education	4 Primary 2 Post Primary	4 Primary 2 Post Primary	--	4 Primary 2 Post Primary
Class One HA	27	<del>29.7</del> 32.5	--	<del>29.7</del> 32.5

**Table 3 Cherrywood Planning Scheme - Table 2.3: Town and Village Centre Development Quantum Ranges Range (as amended by Amendment 8, May 2021)**

	Net Site Area HA	Min/Mx Gross Retail Floor Space Sq.m	Min/Max Gross Residential Floor Space Sq.m	Min/Max High Intensity Employment Gross Sq.m	Min/Max Non-Retail Uses Net Sq.m	Community Sq.m
Cherrywood Town Centre	16.1	34,394/40,909	120,000/150,000	82,800/109,000	47,500/60,000	2,200/3,000
Tully	1.2	4,000/6,060	<del>12,000/18,000</del> 19,500	750/1,000	750/1,000	250/500
Lehaunstown	0.9	1,515/3,790	<del>9,000/12,000</del> 14,800	700/1,000	700/1,000	250/500
Priorsland	0.9	1,290/2,275	<del>9,000/12,000</del> 18,000	700/1000	700/1000	250/500
<b>MAX TOTALS</b>	<b>19.1 HA</b>	<b>41,199/53,034 SQ.M</b>	<del><b>150,000/192,000</b></del> <b>202,300</b>	<b>84,950/112,000 SQ.M</b>	<b>49,650/63,000 sq.m</b>	<b>2,950/4,500 sq.m</b>

Section 2.6.2 sets out the overall approach to the Town Centre and Village Centre. It states that;

A quantum of **high intensity employment floor space up to 109,000 sq.m** will be permitted within the Town Centre. A limited floor area of high density office type employment will also be permitted within the three Village Centres.

### 3.2.2 High Intensity Employment Development

High Intensity Employment (H.I.E) is defined at section 2.6.3 as follows:

**High Intensity Employment types usually have an employee to floor area ratio of c. 1 per 20sq.m. and usually generate peak hour trips. High Intensity Employment types include but are not confined to:**

- **Research Office Employment**
- **Service Office Employment**
- **Science and Technology Business**

### 3.2.3 Land Use Matrix

Appendix A of the Planning Scheme sets out a Land Use Matrix, defining uses that are 'Permitted in Principle' or 'Not Permitted' in this zone.

Permitted uses include;

*Creche, Conference Facility, Community Facility, Cultural Use, Doctor/Dentist, Education, Embassy, Enterprise Centre, Garda Station, Hospital, Hotel/Motel, Leisure facilities, Offices, Open Space, Place of Public Worship, Public Services, Recreational Buildings, Restaurant, Science and Technology, Shop-Local, Sports facility, Tea room/café, Telesales/call centre.*

The land use matrix does not allow:

*Cash-and –Carry/Wholesale outlet, Health Centre, Home Based Economic Activities, Industry (General or Light), Off-licence, Public House, Residential or Residential Institution, Retail Park, Retail Warehouse, Retirement Home, Shop-District/Convenience/Comparison, Takeaway, Transport Depot or Warehousing.*

The land use matrix shows that wide-range of commercial, education, health care and service uses are allowable within the HIE definition.

The following tables outline details regarding the land area and floor area of high intensity employment permitted within the Planning Scheme. It is not envisaged that the scale of development in these areas will be permitted to fall significantly below the stated plot ratios. Each of these HIE sites (HIE 1-6) are labelled and identified on the Maps 6.3, 6.6 and 6.7 in Chapter 6 Development Areas.

Site Name	HIE 1	HIE 2	HIE 3	HIE 4	HIE 5	HIE 6
Site Area	6.6 Ha	1.7 Ha	1.9 Ha	3.4 Ha	1.55 Ha	0.4 Ha
Constructed/ Permitted Sq.m Feb. 2012	64,813	24,149	0	0	0	0
Quantum Remaining Sq.m	40,187	2,851	21,000	58,000	19,000	8,000
Plot Ratio	1:1.6	1:1.6	1:1.1	1:1.7	1:1.2	1:2
Subtotals Sq.m	105,000	27,000	21,000	58,000	19,000	8,000
Total Quantum	238,000 Sq.m					

**Table 4 Planning Scheme Table 2.5: High Intensity Employment Quanta on High Intensity Employment Lands**

	Town Centre	Lehaunstown	Priorsland	Tully
Constructed Sq.m Feb 2012	7,247	0	0	0
Quantum Remaining Sq.m	101,753	1,000	1,000	1,000
Subtotals Sq.m	109,000	1,000	1,000	1,000
Total Quantum	112,000 sq.m			

**Table 5 Planning Scheme Table 2.6: High Intensity Employment Maximum Quantum for Town and Village Centres**

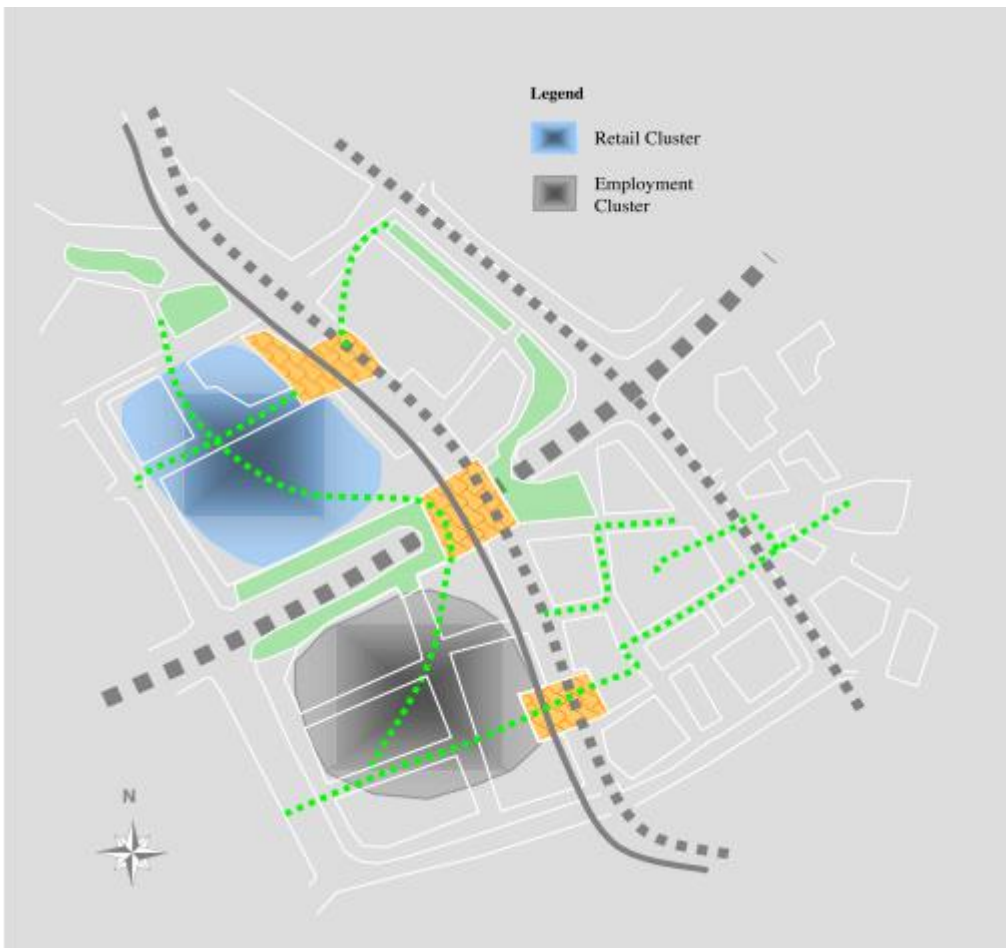
The Planning Scheme also provides a specific zoning for Commercial Uses. Section 2.6.5 distinguishes these uses from HIE as follow:

*Proposed uses in this area will have to demonstrate that they are non-peak hour trip generating and therefore do not place pressure on local transport infrastructure during peak hours. Uses may be open to members of the public, Uses may include but are not confined to:*

- Commercial leisure and recreation
- Warehousing
- Remote car parking
- Showrooms
- Petrol stations
- Wholesale

*But excludes:*

- Convenience and comparison retail that is permitted in the Town and Village Centres.
- High Intensity Employment permissible within the high intensity employment land use area.
- Retail Warehousing.



**Figure 7 Planning Scheme Figure 6.1: Illustrative Sketch of Town Centre**

Figure 6.1 of the Planning Scheme clearly defines TC3 of the Town Centre as an “Employment Cluster”. It is also noted that Table 2.7 sets out “Site Coverage for the Town Centre and Village Centres”. The UDFDF is considered in more detail below.

### 3.2.4 Development Area 2 Cherrywood

Table 6.2.1 of the Planning Scheme provides detail on “Development Type and Quantum for Development Area 2 Cherrywood. The potential floor space quanta appear are based upon plot ratio, site coverage and average floorspace occupancy (20 sq.m.) parameters.



CHERRYWOOD TOWN CENTRE		
Total Town Centre Lands HA	16.1	
RETAIL SQ.M		
	Min	Max
	Net / Gross	Net / Gross
Convenience Retail	2,000 / 3,030	4,000/6,060
Comparison Retail	16,160/24,485	17,600/26,667
Retail Services	4,540/6,879	5,400/8,182
Total Retail Quantum	Min Net / Gross	Max Net /Gross
	<b>22,700/34,34</b>	<b>27,000/40,909</b>
RESIDENTIAL Town Centre		
Residential Dwelling Units	Min	Max
	Circa 1,276	Circa 1,600
Gross Residential Floor Area Sq.m	<b>120,000</b>	<b>150,000</b>
NON RESIDENTIAL USES SQ.M		
High Intensity Employment	Min	Max
	82,800	109,000
Non Retail Uses	Min	Max
	47,500	60,000
Community Facilities	Min	Max
	2,200	3,000
TOTAL NON RESIDENTIAL FLOOR AREA	<b>132,500</b>	<b>172,000</b>
TOTAL QUANTUM FLOOR AREA Town Centre SQ.M	Min	Max
	<b>286,894</b>	<b>362,909</b>
Plot Ratio	Min	Max
	1:1.8	1: 2.3
Site Coverage	Min	Max
	50%	80%
Building Height in Storeys	Min	Max
	2	5
Upward Modifier	3 Storeys	

**Table 6 Extract from Table 6.2.1 “Development Type and Quantum for Development Area 2 Cherrywood”**

The Planning Scheme states that the;

*“Town Centre is further split into 4 areas to ensure a sustainable allocation of uses throughout and to allow for a critical mass of retail, non-retail and community uses, **a honey pot of employment to complement the existing employment in Bride’s Glen** and a dispersal of residential to instil life through the Town Centre. There is an*



*allowance of 10% transfer of uses between the 4 areas in the Town Centre to give flexibility whilst maintaining the overall figures in Tables 6.2.1 and Tables 6.2.2. The optimum split of development quantum between the 4 areas within the Town Centre is detailed in the following table. (This 10% transfer is between each area is subject to agreement between Town Centre landowners)“.*

Table 6.2.2 of the Planning Scheme sets out considerable detail for floor areas in each of the Town Centre quadrants.

TC1 SITE AREA SQM		43,000		
Use	Min Area Sq.m	Min No. Apartments Circa	Max Area Sq.m	Max No. Apartments Circa
Retail Gross	26,750		32,000	
High Intensity Employment	8,000		10,000	
Residential	24,000	255	32,400	346
Non Retail	17,000		21,000	
Community	1,100		1,500	
<b>Total</b>	<b>76,850</b>	255	96,900	346
Plot Ratio	1.8		2.3	
TC2 SITE AREA SQM		21,000		
Use	Min Area Sq.m	No. Units Circa	Max Area Sq.m	No. Units Circa
Retail Gross	2,150		2,800	
High Intensity Employment	0		0	
Residential	28,200	300	36,000	384
Non Retail	7,000		9,000	
Community	0		0	
<b>Total</b>	<b>37,350</b>	300	47,800	384
Plot Ratio	1.8		2.3	
TC3 SITE AREA SQM		53,880		
Use	Min Area Sq.m	No. Units Circa	Max Area Sq.m	No. Units Circa
Retail Gross	3,000		3,100	
High Intensity Employment	54,800		74,300	
Residential	27,000	287	33,600	358
Non Retail	8,000		10,000	
Community	1,100		1,500	
<b>Total</b>	<b>93,900</b>	287	122,500	358
Plot Ratio	1.7		2.3	
TC4 SITE AREA SQ.M		43,000		
Use	Min Area Sq.m	No. Units Circa	Max Area Sq.m	No. Units Circa
Retail Gross	2,494		3,009	
High Intensity Employment	12,753		17,453	
High Intensity Employment Constructed as of February 2012	7,247		7,247	
Residential	40,800	434	48,000	512
Non Retail	15,500		20,000	
Community	0		0	
<b>Total</b>	<b>78,794</b>	434	95,709	512
Plot Ratio	1.8		2.2	
<b>TOTAL QUANTUM Town Centre SQ.M</b>	Min 286,894		Max 362,909	
<b>Total no. of Apartments</b>	Min. No. Apartments Circa 1,276		Max. No. Apartments Circa 1,600	
		<b>Min</b>		<b>Max</b>
Site Coverage Town Centre		50 %		80%
Building Height in Storeys Town Centre		2		5

**Table 7 Planning Scheme Table 6.2.2 Breakdown of Development Quantum for Sites TC1, TC2, TC3 and TC4 Cherrywood Town Centre**

### 3.2.5 Development Area 6: Bride's Glen

Section 6.6 of the Planning Scheme refers to Bride's Glen, which comprises HIE1 and HIE 2 to the east and south of the Town Centre. HIE3 is located at the western end of the planning scheme area beside the M50.

The Bride's Glen, also known as the Cherrywood Business Park makes up the majority of the lands within the Plan Area designated for High Intensity Employment development. A significant portion of these lands have already been developed to accommodate such development. Bride's Glen should continue to develop as a high quality architecturally designed employment area with access to a variety of quality amenities including the linear park, the Luas and the range of services in the adjacent Town Centre.

The extended Luas line to Bray will run through this area. It will be incorporated into the linear park and cross the viaduct. Specific Objectives do not refer to the HIE use *per se*, rather general layout principles. Detailed floor space is prescribed for the uses in Table 6.6.1 as included below.

DEVELOPMENT AREA 6 BRIDE'S GLEN LAND USE AREAS	
LAND USE	AREA IN HECTARES
Residential	2.2
High Intensity Employment	10.2
Green Infrastructure	5.1

NON RESIDENTIAL DEVELOPMENT		
High Intensity Employment		
Site Name	Development Quantum Sq.m	Area Ha
HIE 1	105,000	6.6
HIE 2	27,000	1.7
HIE 3	21,000	1.9
TOTAL	153,000	10.2

Breakdown for Site HIE 1	
Site Area HA	6.6
Max Quantum Sq.m	105,000
Constructed Sq.m as of February 2012	34,938
Permitted, Not Constructed Sq.m as of February 2012	29,875
Remaining Quantum Sq.m	40,187
Plot Ratio	Max
	1:1.6
Height Storeys	Max
	5

Breakdown for Site HIE 2	
Site Area HA	1.7
Max Quantum Sq.m	27,000
Constructed Sq.m as of February 2012	24,149
Permitted, Not Constructed Sq.m as of February 2012	-
Remaining Quantum Sq.m	2,851
Plot Ratio	Max
	1:1.6
Height Storeys	Max
	5

Breakdown for Site HIE 3	
Site Area HA	1.9
Max Quantum Sq.m	21,000
Constructed Sq.m as of February 2012	-
Permitted, Not Constructed Sq.m as of February 2012	-
Remaining Quantum Sq.m	21,000
Plot Ratio	Max
	1:1.1
Height Storeys	Max
	5

Figure 8 Planning Scheme Table 6.6.1 Development Type and Quantum Development Area 6 Bride's Glen

### 3.2.6 Development Area 7: Macnebury

Section 6.7 of the Planning Scheme refers to Macnebury, which comprises HIE4 and HIE5.

DEVELOPMENT AREA 7 MACNEBURY LAND USE AREAS	
LAND USE	AREA IN HECTARES
High Intensity Employment	4.95
Commercial Uses	2.9
Residential	6.4
Green Infrastructure HA	2.2

NON-RESIDENTIAL DEVELOPMENT	
HIGH INTENSITY EMPLOYMENT	
<b>High Intensity Employment Lands HA</b>	4.95
<b>Max Quantum Sq.m</b>	74,000
BREAKDOWN FOR SITE HIE 4	
<b>Area HA</b>	3.4
<b>Max Quantum Sq.m</b>	58,000
<b>Plot Ratio</b>	<b>Max</b>
	1: 1.7
<b>Building Height in Storeys</b>	<b>Max</b>
	5 6
BREAKDOWN FOR SITE HIE 5	
<b>Area HA</b>	1.55
<b>Max Quantum Sq.m</b>	19,000
<b>Plot Ratio</b>	<b>Max</b>
	1:1.2
<b>Building Height in Storeys</b>	<b>Max</b>
	4 6

Figure 9 Planning Scheme Table 6.7.1 Development Type and Quantum Development Area 7 Macnebury

### 3.3 Urban Form Development Framework

The UFDF provides comprehensive guidance on all key aspects of development within the Town Centre (TC1-TC4). The UFDF is consistent with the approved Planning Scheme.

Pursuant to Table 6.2.2 'Breakdown of Development Quantum for sites TC1, TC2, TC3 and TC4' which defines this quantum and land use distribution across each of the 4 no. Town Centre quadrants, the Land Use Strategy contained within Section 2.0 of the UFDF and illustrated on Map 2 was developed having regard to the land use quanta and allocation and the future form of the Town Centre.

The purpose of the Urban Form Development Framework is to provide clarity and to assist the assessment of whether planning applications are consistent with the objectives of the Planning Scheme. Any development permitted in the town centre shall be in accordance with the Urban Form Development Framework.



**Figure 10 UDF Map 2 Land Use Strategy**

Section 2.4 of the UDF provides identifies ‘a principal focus and civic core’ and (f), to identify ‘the provision of facilities including a community facility, places of worship, a library, and a primary care unit within TC1, focused around the provision of a community facility/ library, place of worship and primary care unit, in the vicinity of Cherrywood Square at the Gateway to the mixed used area of TC1.

The civic core encompasses Cherrywood Square at the Cherrywood Luas stop, connected physically and visually to the entrance to Tully Park, the Transport Interchange and the ‘Civic Street’. It is a place of significance and is articulated by taller buildings and dominated by the main public and civic uses and focal buildings such as the library, with the addition of retail and non-retail uses which provide activity during the day and evening.

A secondary civic area is located within TC3 which provides a centrally located ‘hub’ enclosed by a mix of uses including employment, non-retail, retail, community and residential uses and connected by links to the remainder of the Town Centre.

At section 2.7 the UDF states the following in respect of HIE:

***Within TC1 high intensity employment uses are to be located on upper levels of the buildings adjacent to the Luas line. TC3 is predominantly (two thirds) high intensity employment. This shall be located closest to the Wyattville Link Road and along Grand Parade. TC4 has an existing office building (Block H) which is to be retained and integrated into the development of TC4. The remainder of the HIE allocation in TC4 shall be located on the prominent corner at Junction A of the Wyattville Link Road and will form a landmark and a buffer to the residential elements within TC4.***

### 3.3.1 HIE Planning Permissions

The following planning applications are note:

DZ17A/0122	HIE1 - DA 6 Brides Glen Application for office buildings ,Blocks F1&F2
DZ17A/0731	HIE1 - DA 6 Brides Glen Application for office building ,Block G3
DZ17A/0862	Town Centre TC1, TC2 and TC4 Parent application for town centre mixed-use development
DZ17A/1104	HIE1 - DA 6 Brides Glen Application for office building ,Block F3
DZ19A/0186	HIE1 - DA 6 Brides Glen Amendments to Block F1 &F2, landscaping of roof terrace
DZ19A/0255	HIE1 - DA 6 Brides Glen Alterations to Cherrywood Business Campus
DZ20A/0477	HIE3 - DA 6 Brides Glen temporary surface car parking for Cherrywood Business Campus
DZ20A/0611	HIE2 - DA 6 Brides Glen Change of buiding use, from vacant office to Day Hospital
DZ21A/0785	TC3 Application for Block TC3-1 office building
DZ23A/0283	HIE1 - DA 6 Brides Glen Change of use of existing Building 8 from office to medical

### 3.4 Other Policy

There is a requirement for consistency between the economic policies and zoning objectives of the plan and higher-level plans (the NPF, the RSES), which should also be informed by the economic and social development potential of the area. The following high level Strategic plans and policies are briefing noted:

#### 3.4.1 Climate Action and Low Carbon Development Acts 2015 to 2021

Ireland's statutory climate objective is to seek a 51% reduction in emissions by 2030 (relative to 2018 levels) and net-zero emissions no later than 2050. This is to be achieved through the national long-term climate action strategy setting out sectoral targets for GHG reductions, an annual update to the Climate Action Plan and through Local Authority Climate Action Plans (LACAPs), discussed further below.

#### 3.4.2 Climate Action Plan 2024

The Climate Action Plan's vision is that a climate-neutral Ireland will bring new, green employment opportunities. It sets out a number of key measures, which will drive the creation of jobs with new skills requirements in a number of sectors, including building retrofits; renewable energy generation; and the move to sustainable mobility.

The transition to a climate neutral economy has significant potential to create employment and enterprise opportunities with new jobs, skills, and investment opportunities and a more resilient economy.

#### 3.4.3 Project Ireland 2040 - National Planning Framework

The NPF is based on projected national population, housing and employment growth. Balanced regional development, compact growth, a strong economy, strengthen rural economies, low carbon and climate resilient society, sustainable accessibility and connectivity, and the sustainable use of resources and infrastructure investment and other key strategic objectives are encapsulated by the 10 National Strategic Outcomes of the NPF and associated strategic investment priorities.

At a national level it is an objective (**NPO1a**) of the NPF that employment growth in the Eastern and Midlands Regional Assembly (EMRA) area will be matched by that of the Northern and Western Regional Assembly (NWRA) and Southern Regional Assembly (SRA) areas combined. Current 2040 RSES targets are for 320,000 additional jobs in the EMRA area, 115,000 additional jobs in the NWRA area and 225,000 additional jobs in the SRA area. The NPF aims to secure 50% growth in the five cities (NPO2a) and suggests that focus of economic growth should also be concentrated in the five regional growth centres.

To support the implementation of these targets, **NPO10a and b** require Regional and Local Authorities to identify and quantify locations for strategic employment development in cities and, where suitable, within urban and rural areas generally. It underscores the need to consider the detailed nature of current employment locations; locations for expansion of existing enterprises; suitable locations for new enterprises of different character; and locations to accommodate the relocation of enterprises to facilitate urban regeneration<sup>1</sup>.

The first revision of the NPF is underway and expected to conclude in the Spring of 2024; this will include an update of demographic modelling and related housing demand projections.

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<sup>1</sup> Section 4.4, [National Planning Framework](#).



Development plans are required to be consistent with the policy objectives of the NPF and relevant RSES<sup>2</sup>.



*Figure 11 Extract from NPF (Section 4.4, page 64)*

### 3.4.4 Development Plan – Guidelines for Planning Authorities (2022)

The guidelines indicate that land use policies should support the activities of development agencies by:

- ensuring the requirements of specific sectors are being addressed in land use terms, i.e. both local start-up businesses and foreign direct investment;
- new, emerging technologies/industries and any specific land use planning implications that may arise;
- co-ordination of employment and industrial land provision with other specific infrastructure requirements such as roads and public transport, water services, energy and/or communications;
- planning schemes for Strategic Development Zones designated by Government under Section 166 of the Act.<sup>3</sup>

Appendix B of these guidelines sets out Recommended Standardised Zoning Objectives for a consistent approach to zoning nationally. The Zoning of the HIE lands is a consideration of this report and therefore the relevant categories are appended.

Relevant definitions for employment activities are considered in detail in section 7 below.

### 3.4.5 Enterprise & Employment policy framework

The strategic and statutory planning policy context emphasises the need for a strong understanding of the broader policy context that the planning system operates within when engaging with key stakeholders, devising an economic strategy for the development plan and undertaking the Assessment. The following national,

<sup>2</sup> Section 12(18) of the 2000 Act.

<sup>3</sup> Section 4.6.2 of the Development Plan- Guidelines for Planning Authorities, July 2022.



regional and local level plans, policies and programmes are of particular relevance and should be central to the development of the economic strategy and the assessment of enterprise and employment lands.

### 3.4.6 Enterprise 2025 Renewed (2018)

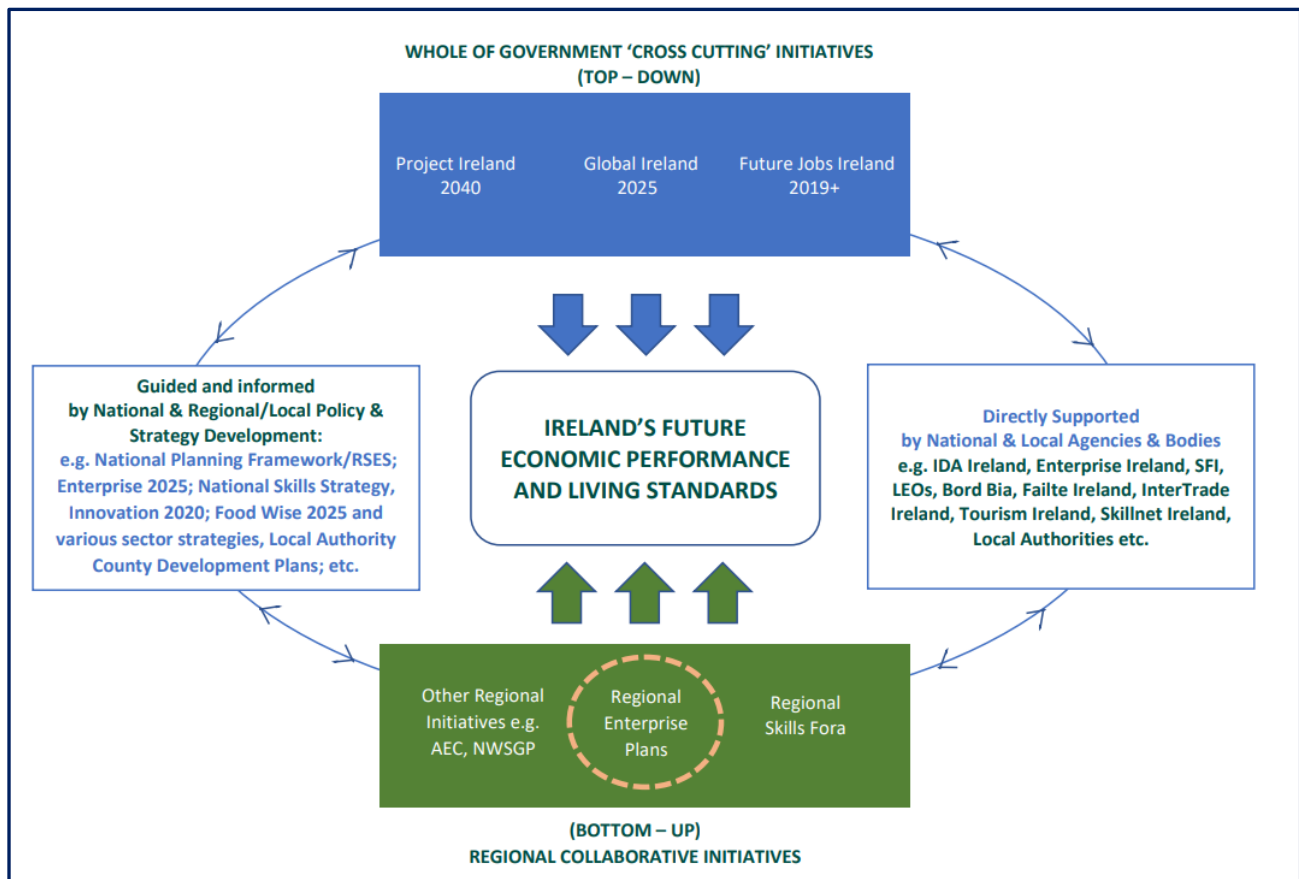
Enterprise 2025, published in 2015, was reviewed in 2018 to ensure that it remains robust in response to a number of recent significant global changes, specifically: Brexit; United States trade and investment; international tax developments and disruptive technologies. The Strategy commits to supporting regions throughout Ireland in realising their potential with a focus on place-making and recognises the strong interdependence between planning, development and design of an attractive environment and enterprise development.

### 3.4.7 Future Jobs Ireland (2019)

The Future Jobs Ireland strategy (2019) is an integral part of Government initiatives to improve future economic performance and living standards. The Strategy's focus is on quality, rather than quantity of jobs, to ensure resilience into the future, and five pillars:

1. Embracing Innovation and Technological Change;
2. Improving small and medium enterprise (SME) Productivity;
3. Enhancing Skills and Development and Attracting Talent;
4. Increasing Participation in the Labour Force; and
5. Transitioning to a Low Carbon Economy.

Specific deliverables and targets are identified for each pillar, including increasing the impact of Local Employment Offices (LEO's) on improving SME productivity; increasing participation in the labour force by 3% for people aged 25-69 years to 78% and to review the regional dimension of the economic and employment implications of the transition to a low carbon economy.



**Figure 12 Whole of Government approach to Economic development**

### 3.4.8 Government of Ireland, White Paper on Enterprise 2022-2030

The White Paper for Enterprise 2020-2030 sets out the Government's vision for *'Irish-based enterprise to succeed through competitive advantage founded on sustainability, innovation and productivity, delivering rewarding jobs and livelihoods.'* It focuses on the delivery of seven priority policy objectives, the first of these is to embed decarbonisation and net zero commitments into enterprise policy.

The White Paper specifically recognises regional and spatial clustering of similar enterprise types as a key tool for achieving enterprise policy objectives, including driving innovation, attracting and embedding FDI and developing linkages between multinationals and indigenous firms. It also notes the role which clustering can play in the green and digital transitions. It proposes the establishment of a National Clustering Programme (NCP), with a target to fund 5 national cluster organisations by 2025, and the establishment of a central coordination entity to bring coherence to the current ad hoc landscape around clustering in Ireland.

Grant Thornton was commissioned to undertake research to develop an evidence base to support the development of a National Clustering Policy. The Grant Thornton report,<sup>4</sup> published in March 2023, advises that there would be "significant merit in establishing an open and multi-layer cluster programme" which

<sup>4</sup> [Development of an Evidence Base to Support the Development of a National Clustering Policy and Framework - DETE \(enterprise.gov.ie\)](https://www.enterprise.gov.ie/en/development-of-an-evidence-base-to-support-the-development-of-a-national-clustering-policy-and-framework)

encourages collaboration between Industry, Academia and Government in a triple-helix model. The definition of clusters used was:

*“Clusters are geographic interactive alliances of interconnected enterprises, research centres and associated institutions in particular fields that compete, cooperate and face common challenges and opportunities”.*

The national coordination entity will coordinate the operation of existing clusters, whilst supporting the development of clusters of scale. As the National Cluster Policy is developed and rolled out, the national coordination entity will be located in the Department of Enterprise, Trade and Employment (DETE).

### 3.4.9 Powering the Regions: Enterprise Ireland Regional Plan (2019)

The Regional Enterprise Plans (REPs) recognise that enterprise policy coherence and collaboration at the national level needs to be mirrored from the ‘bottom up’, to enable:

- a place-based perspective on needs, capabilities and opportunities to inform national enterprise and other policies;
- economies of scale through joined up actions and investment;
- effective targeting of national initiatives to areas of opportunity and greatest need; and
- development and delivery of a programme of collaborative actions that can drive better outcomes in terms of regional job creation.

Enterprise Ireland classifies Ireland into nine regions and within each region an Enterprise Plan has been prepared to align with the vision and objectives of the NPF and RSES.

The principle underpinning the **Regional Enterprise Plans** is collaboration between regional stakeholders on initiatives that can help to realise each region’s enterprise development potential, adding value to the core activities being delivered by the enterprise agencies, LEOs and other bodies in the region. Important actions include SME engagement and supporting a **Regional Skills Forum** to link companies with the education and training providers best suited to responding to identified skills need. These REPs are implemented by Regional Programme Manager.

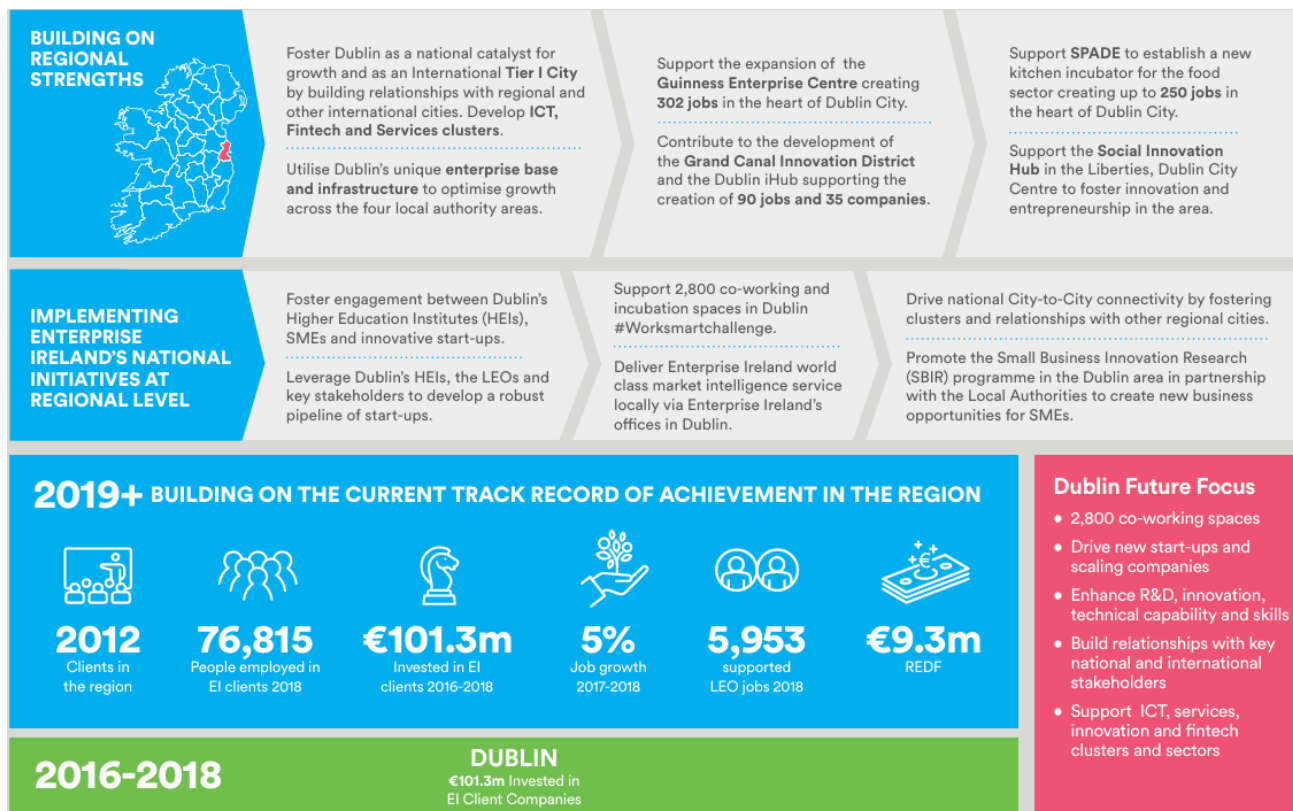


Figure 13 Powering the Regions: Enterprise Ireland Regional Plan (2019) – Summary for Dublin

### 3.4.10 Dublin Regional Enterprise Plan to 2024

The Dublin Regional Enterprise Plan to 2024 was launched by the Department of Enterprise, Trade and Employment in TU Dublin within the Dublin Enterprise Zone on 1 April 2022.

The new Plan includes projects and initiatives across the four Dublin local authorities (Dublin City Council, Dún Laoghaire-Rathdown, Fingal and South Dublin). Stakeholder consultation sessions attracted attendees from across industry, public sector and higher education sectors from within the region. The sessions highlighted the high-level of collaboration and ambition that exists within the region, with a strong sense of optimism to strengthen resilience amongst Dublin's SMEs to engage economic activity to bring vibrant growth and development over the next three years.

Table 8 Dublin Enterprise Plan - The six strategic objectives

<p><b>1 Strengthen resilience and the potential for scaling amongst Dublin's SME's and start-Ups</b></p>	<p>This objective includes actions to develop and grow enterprise hubs for community, social and economic development. To scale-up ecosystems, cultivate SME's on procurement and grow opportunities to SME's in the region to a SMART Connected Technologies Cluster.</p>
<p><b>2 Promote context specific, attractive and adaptive place-making for an evolving world of work &amp; diverse lifestyles, enabling resilience, business recovery and new opportunities for Dublin</b></p>	<p>This objective is the promotion of the Dublin Brand for adaptive place-making both domestically and internationally in the context of living, working, investing, studying and visiting the Dublin region. This allows the Dublin region lead in digital transformation.</p> <p>This action acknowledges the creation of vibrant areas, accessible across all societal needs, ages and abilities with excellent connectivity.</p>

<b>3 Facilitate every individual to realise their full potential through engagement in economic activity</b>	This objective is centred around inclusivity with initiatives that are targeted at marginalised and disadvantaged communities to support their pathway to employment or self-employment.
<b>4 Enable and position business as leaders in Dublin’s low-carbon transition</b>	This objective aims to support the activities of the Dublin region to develop transformative projects to guide emerging ‘low-carbon economy’ focused research and projects aligned to climate challenges we face, establish a circular hotspot and learn from other cities.
<b>5 Ensure the availability of skills and talent to realise Dublin’s future economic potential</b>	This objective includes leading the way for educational providers to deliver training supports, growth paths for skills and talent to reach the Dublin region’s full potential, ensuring the right skills are available for job opportunities, talent and innovation.
<b>6 Strengthen Dublin’s ecosystem</b>	This objective will allow the collaboration of state agencies, academia, private sector to position Dublin as a Tier 1 capital city through innovative initiatives for sustainable and competitiveness.

### 3.4.11 EU Just Transition Fund

Ireland’s National Mitigation Plan represented an initial step in transitioning Ireland to a low-carbon, climate resilient and environmentally sustainable economy by 2050. The Climate Action Plan, discussed above, commits to delivering a just transition, recognising the significant level of change required and that the burden must be as fairly distributed as possible. De-carbonising the economy presents significant challenges but also brings important opportunities to respond and create learning on how best to deliver a just transition.

The EU Just Transition Fund is part of Ireland’s cohesion funding, alongside other funds, and can support a wide range of investment such as in SMEs and start-ups, research and innovation, transfer of advanced technologies, affordable green energy, as well as decarbonisation of local transport. EMRA was appointed by the Minister of DECC as the Managing Authority of the Just Transition Fund.

### 3.4.12 Local Economic and Community Plan – Guidelines for Planning Authorities

As part of local government reform in 2014<sup>5</sup> there was a fundamental reorganisation of local governance structure to allow devolution of greater decision-making to local people. A key element of the new local governance structures included the preparation of a Local Economic and Community Plan (LECP). These set out high-level goals, objectives and actions needed to promote and support economic development and local and community development. An important aspect of the rationale for the enhanced local government role in economic development is to forge a stronger connection between spatial planning and economic development. The LECP is an action-focused plan that must be consistent with the statutory Development Plan, the RSES and government policy on economic development<sup>6</sup>.

<sup>5</sup> Local Government Reform Act, 2014

<sup>6</sup> Section 66B(4) of the Local Government Act 2001 (revised).

### 3.5 Eastern and Midlands Regional and Spatial Economic Strategy

The principal purpose of the *Regional Spatial and Economic Strategy for the Eastern and Midland Regional Assembly* (RSES) (EMRA, 2019) was formed to support the implementation of the NPF within the Region. Key enablers for growth of the region include delivering development areas identified in the Dublin Metropolitan Area Strategic Plan (MASP) to ensure a steady supply of serviced development lands to support Dublin’s sustainable growth. The RSES also provides population projections, which are fundamental to the future growth requirements of the Region.

The economic strategy set out in the RSES is based on smart specialisation, clustering, orderly growth, future proofing and risk management and placemaking. The RSES emphasises the need to increase employment in strategic locations, to provide for people-intensive employment at sustainable locations near high quality public transport nodes, to build industry clusters and smart specialisation. The MASP for Dublin calls for increased employment densities within Dublin City and suburbs and at other sustainable locations near high quality public transport nodes, near third level institutes and existing employment hubs, and for the relocation less intensive employment uses outside the M50 ring and existing built-up areas.

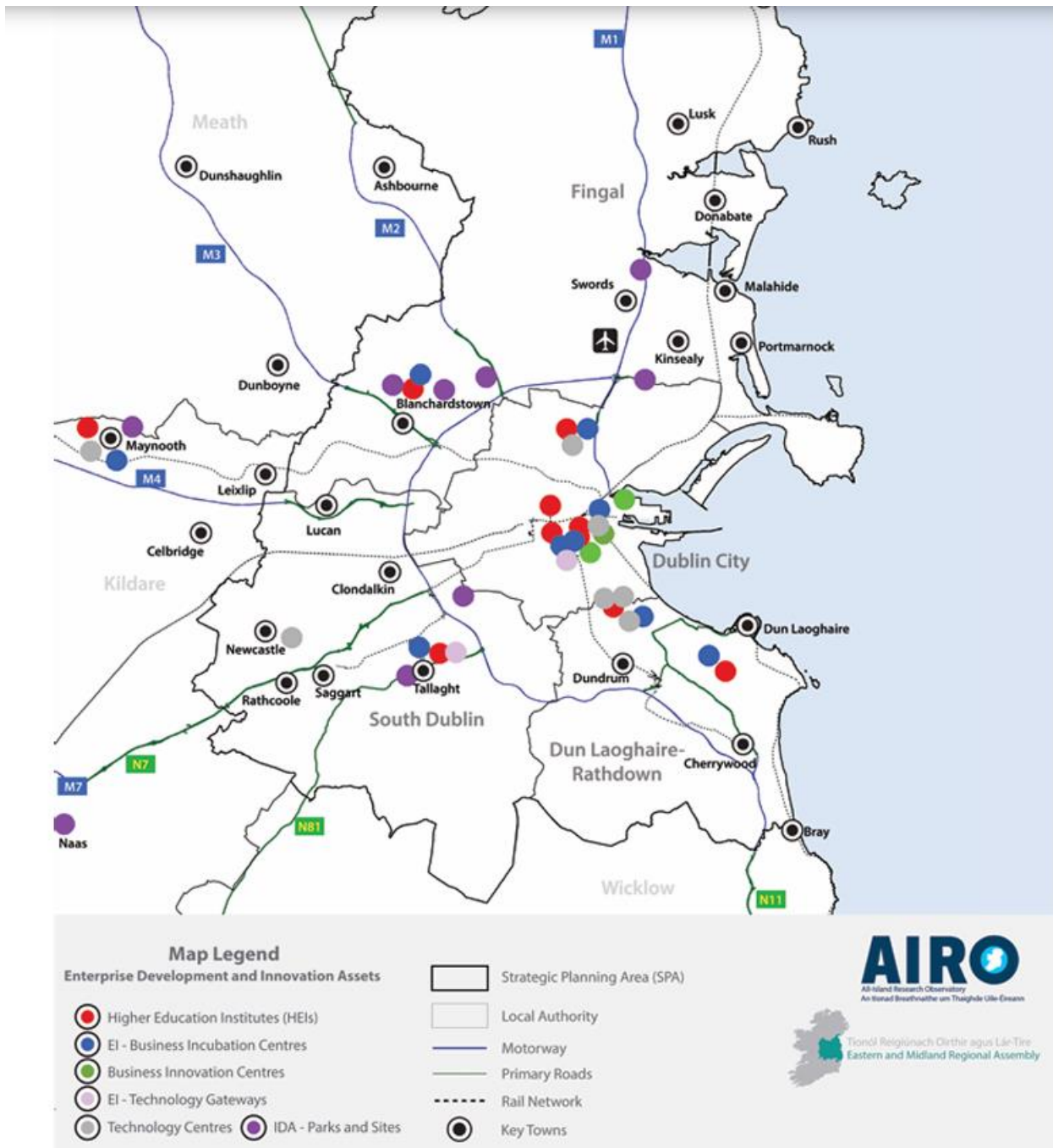


Figure 14 Dublin SPA's Enterprise Development and Innovation Assets Map (EMRA RSES Figure 6.6)

Cherrywood is identified as a Key Town on the RSES Enterprise Development and Innovation Assets (above). It is notable that the map illustrates an absence of clustering with HIEs, EI, Technology Gateway or Business Innovation.

#### 4.4 Dublin City and Suburbs

*The RSES supports continued population and economic growth in Dublin City and suburbs, with high quality new housing promoted and a focus on the role of good urban design, brownfield redevelopment and urban renewal and regeneration. There is an opportunity to promote and improve the provision of*



***public transport and active travel and the development of strategic amenities to provide for sustainable communities.***

*The NPF sets out ambitious targets to achieve compact growth with 50% of housing to be provided within or contiguous to the built-up area of Dublin City and suburbs. To achieve this, the MASP identifies strategic residential and employment corridors along key public transport corridors existing and planned, that contain development opportunities.*

*There is also potential for significant re-intensification of employment lands within the M50 ring, at Sandyford Business District and Cherrywood, to complement the Docklands and city centre business district. Metropolitan Area Strategic Plan*

The RSES also incorporates the Dublin Metropolitan Area Strategic Plan (MASP). This plan includes a number of guiding principles and identifies the strategic development corridors for accommodating future growth. It also sets out the enabling infrastructure, including transport. The MASP comprises a key input into the transport strategy by providing clear direction in terms of spatial planning policy at the Metropolitan level.

The Strategic Development Areas and Corridors identified by the MASP are set out below along with a selection of the identified enabling transport infrastructure:

***MetroLink / Green Line Corridor – Luas Green Line Upgrade; MetroLink.***

The following Regional Policy Objectives are included as part of the MASP:

***RPO 5.2: Support the delivery of key sustainable transport projects including Metrolink, DART and Luas expansion programmes, BusConnects and the Greater Dublin Metropolitan Cycle Network and ensure that future development maximises the efficiency and protects the strategic capacity of the metropolitan area transport network, existing and planned;***

The MASP also sets out the potential growth of the Strategic Employment Development Areas, which include:

- **Cherrywood / Ballyogan / Sandyford;**



Figure 15 Dublin MASP Strategic Plan

MASP (Table 5.1 Strategic Development Areas) supports Continued development of **high-density business districts at Cherrywood and Sandyford**.

**5.8 Employment Generation** The MASP identifies a number of large-scale employment and mixed-use development areas within the metropolitan area, which should be developed in co-ordination with the sequential delivery of infrastructure and services.

The MASP aims to continue densification in the city centre, re-intensify strategic employment areas within the M50 ring and to **activate key strategic sites such as Cherrywood** to complement existing employment hubs such as the city centre, Docklands and Sandyford Business District, providing for a limited number of people intensive employment locations that are accessible to public transport

**Table 5.2 of MASP** ‘Potential of Strategic Employment Development’ defines Cherrywood as a **Mixed-use districts with significant retail and people intensive employment to complement city centre and docklands**

### 3.5.1 Transport Strategy for the Greater Dublin Area 2022–2042

The Transport Strategy for the Greater Dublin Area, 2022-2042 sets out how transport will be developed across the region, covering Dublin, Meath, Wicklow and Kildare, over the next 20 years.

*In the GDA, it has been given expression in recent years by development proposals based primarily on accessibility to existing and proposed rail lines. Most notably, the Adamstown and Cherrywood Strategic Development Zones (SDZs) and the forthcoming City Edge Masterplan are based on servicing a major part of the transport demand by Luas and / or DART*

**Measure PLAN7 Transit-Oriented Development** highlights that the NTA will continue to support and facilitate the delivery of TOD at locations identified as appropriate for such, and will work with EMRA and the local authorities in identifying further locations served by existing and proposed public transport which are appropriate for high density development supporting a mix of uses.

**Measure PLAN5 – Retail Development** Major retail developments will be supported at city and town centre locations, at locations which form part of major residential development areas such as Cherrywood or Clonburriss or as extensions to legacy retail centres. Major new “out-of-town” retail developments will not be supported.

**Measure LRT9 – Luas Green Line** During the period of this strategy, it is intended to deliver significant additional capacity on the Luas Green Line through the provision of additional fleet and necessary infrastructure to meet forecast passenger demand.

### 3.6 New Dublin Area Bus Network Summary Document September 2020

The BusConnects Dublin Area Bus Network provides for a significant remodelling of the city’s network on the following basis:

- Spines – frequent routes made up of individual bus services timetabled to work together along a corridor. At the end of the corridor, the individual services branch off to serve different areas.
- Orbitals – services operating around the city. They provide connections between suburbs and town centres, without having to travel into the City Centre. They also provide connections to rail, Luas and other bus routes.
- Peak-Only Routes – services operating during the peak travel periods, generally weekday mornings and evenings, providing additional capacity along key bus corridors.

Cherrywood is not allocated a Park and Ride designation, on the basis these are ‘Sited away from congested locations to enable access.’ The transport strategy for the Dun Laoghaire area illustrates Cherrywood is located beside the E1 Spine and beside the L22 Local Route and X2 Peak Time Route

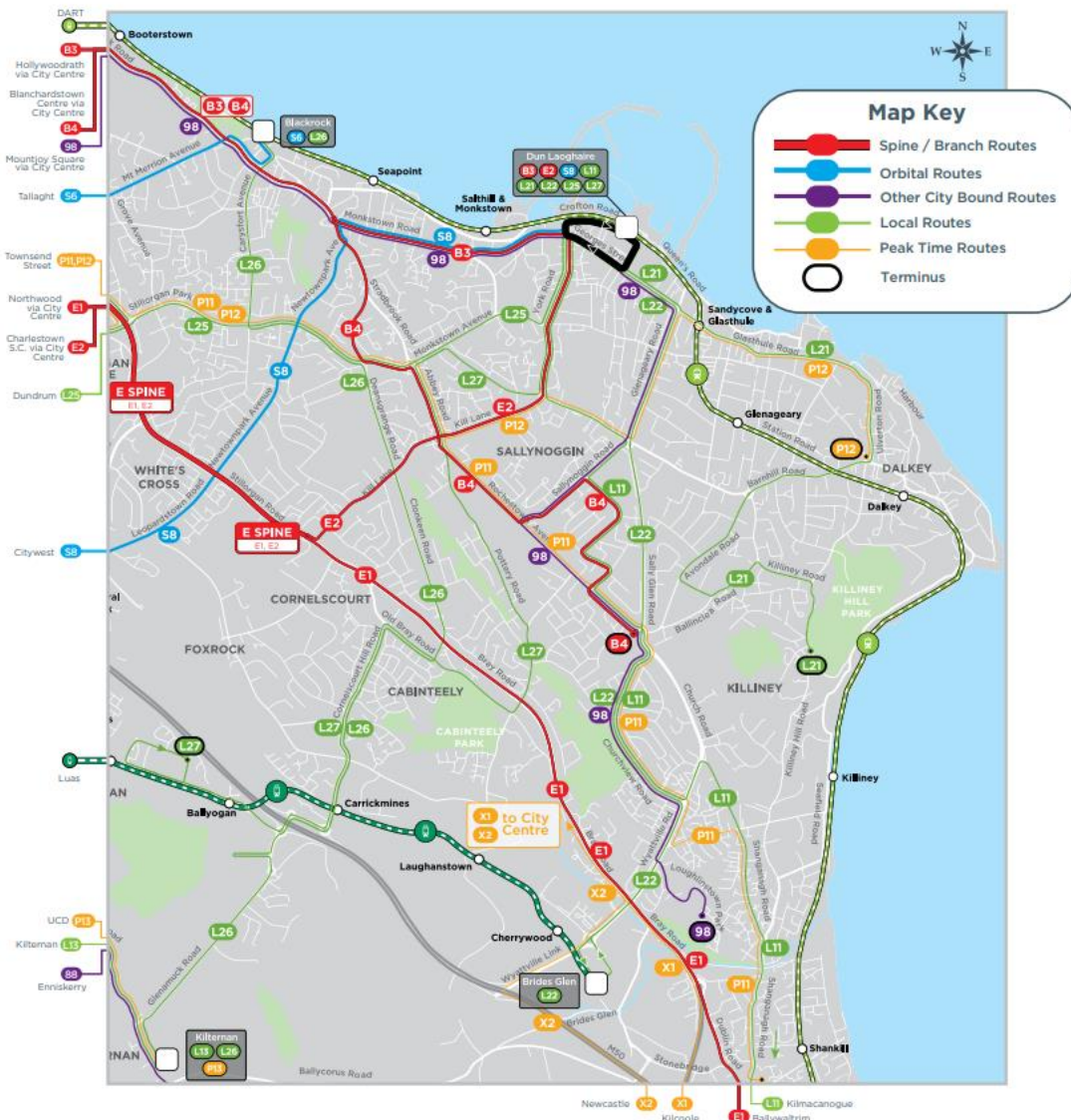


Figure 16 BusConnects network map for Cherrywood and DunLaoghaire

### 3.7 Dún Laoghaire-Rathdown County Development Plan 2022-2028

In line with the RSES guiding principles, the spatial strategy for employment in DLR is to provide for the expansion of employment through the designation of a range of sustainable employment locations. The DLRCC County Development Plan identifies Cherrywood as a Strategic Employment Location.

The DLR strategy supports the intensification and redevelopment of existing strategic employment areas within the M50 ring and the activation of key strategic sites such as Cherrywood which are accessible to public transport. The strategy seeks to align strategic employment locations with existing and identified residential growth areas through high frequency transport, thereby minimising the divergence between the places people live and work, increasing the efficiency of land-use, reducing sprawl and minimising carbon footprint. The DLR employment strategy aims to create the conditions to attract internationally mobile investment and provide opportunities for indigenous enterprise growth. The Plan also notes the comparatively positive and sustainable Jobs Ratio in the County.

The implementation and monitoring framework for the Dún Laoghaire-Rathdown County Council (DLRCC) Plan is anchored to the Vision for the County Development Plan and the Strategic County Outcomes which underpin its delivery. The County Development Plan Vision and Strategic County Outcomes are themselves broadly aligned with the Regional Strategic Outcomes of the RSES, the National Strategic Outcomes of the NPF, and the United Nations Sustainable Development Goals.

*Construction and planning activity in recent years has been primarily focused at a number of strategic locations in the County; namely Sandyford Business District, Dundrum, Blackrock, Cherrywood and Carrickmines. The Sandyford Business District continues to evolve and expand with significant recent occupancies including Microsoft's new European Headquarter building and Mastercard's European Technology Hub, both located at South County Business Park. The role of Cherrywood as a significant employment destination in the County continues to grow with c. 47,000 sqm of High Intensity Employment granted since the adoption of the SDZ Scheme and c. 21,500 sqm of this quantum currently under construction and nearing completion. Knowledge intensive and high-tech start-ups and companies are an increasing presence in the County as evidenced by the significant demand and continued growth of NovaUCD.*

*It is anticipated that the prevailing trend and shift from 'high-volume jobs' to 'high-value jobs' is likely to continue over the Plan period.*

*.. The Core Strategy of this Plan has concluded that there are sufficient employment zoned lands to meet estimated demand over the lifetime of the Plan. It is noted, however, that the extent of the employment landbank in DLR is quite low in comparison to adjoining Counties in the MASP area, and in this regard, there is an enhanced need to retain and protect these strategically located employment lands for employment purposes in line with their RSES designation which extends beyond the lifetime of the Plan.*

**6.4.2.1 Policy Objective E2: Knowledge Economy** *It is a Policy Objective to promote the development of knowledge-based enterprise in the County.*

**6.4.2.2 Policy Objective E3: Cultural and Creative Industries** *It is a Policy Objective to promote the development of cultural and creative enterprises in the County.*

**6.4.2.3 Policy Objective E4: Further and Higher Education Institutions** *It is a Policy Objective to work in conjunction with Further and Higher Education Institutions in the creation and fostering of enterprise through research, innovation and development activities and the commercialisation of such activities. The Council will support the development of sites where high-tech and high potential start-ups can thrive, in conjunction with Institutes of Technology and Universities, to create collaborative and innovative growth.*

**6.4.2.8 Policy Objective E9: Smart Dublin** *It is a Policy Objective to support the Smart Dublin Initiative which will allow greater flexibility for the County to work with Universities, citizens, entrepreneurs and companies, to co-innovate, test and deploy new urban solutions.*

**6.4.2.9 Policy Objective E10: Office Development** *It is a Policy Objective to facilitate significant additional office development in employment and commercial centres. The appropriate locations for office development would generally be in employment zoned areas, Major Town Centres and District Centres.*

*The extent of the employment landbank in DLR is quite low in comparison to adjoining Counties in the Dublin MASP area and there is an enhanced need to retain and protect these lands for employment purposes. The Dublin*

*MASP identifies Sandyford, Cherrywood and Carrickmines as strategic employment locations in the Dublin Metropolitan Area.*

**6.4.2.14 Policy Objective E15: Securing Employment Growth** *It is a Policy Objective to ensure that employment zoned land facilitates its primary objective which is to provide for economic development and employment. The Council will apply a restrictive approach to residential development on employment zoned lands.*

The Key Performance Indicators set out in the implementation and monitoring framework in Section 15.5 of the Development Plan are not intended to comprise an exhaustive list and additional data / information – both quantitative and qualitative - may be incorporated for analysis purposes, as appropriate.

### 3.8 Local Economic and Community Plan (LECP) 2016-2022

The Local Economic and Community Plan (LECP) sets out high level goals. These can be summarised as follows:

- Community participation
- Partnership to promote social inclusion, tackle poverty and disadvantage.
- Support the adequate provision of a range of mixed tenure, affordable, adaptable housing and work spaces in sustainable mixed use neighbourhoods.
- Ensure adequate infrastructure.
- Provide and protect a range of public, safe and affordable amenities.
- Maximise opportunities and support for the creative industries and cultural.
- Identify and support the growth sectors such as tourism, technology, food chain, education, retail and green business that will create.
- Promote access to a range of education, training and developmental opportunities.
- Develop the eco-system of start-ups, social enterprise, micro business and small business in the city economy.
- Support the continued development of a quality, affordable and accessible movement system.
- Tackle the causes and consequences of the drugs crisis and significantly reduce substance misuse across the city through quality, evidence-informed actions.
- Enhance the recognition of Dublin as a globally connected city region and as the national economic generator.

The LECP is currently being reviewed and a new Plan will be in place for 2024 to 2030 period.

The **Dún Laoghaire-Rathdown Socio-economic Statement 2023-2028** is referred to below in section 4.3 Local Economic Profile.



## 4. AREA PROFILE

### 4.1 Introduction

The socio-economic analysis undertaken for DLR is set within the context of the Greater Dublin Area to provide an in-depth understanding of the current socio-economic make-up of the Dún Laoghaire-Rathdown County area. This section provides a profile of the socio-economic characteristics regarding:

- labour market structure;
- industrial structure; and
- business numbers and company size.

In addition, to the socio-economic profile, the area will be characterised with reference to the opportunities and constraints that may arise for the SDZ area. Furthermore, this section provides an appraisal of comparable centres, which will assist in identifying opportunities for Cherrywood.

### 4.2 Labour Market

Business investment decisions are typically based on the availability of land/sites, capital and labour. The section below considers occupation and the industry of employment.

Alain Bertaud, the senior research scholar at the NYU Marron Institute of Urban Management, advocates that Cities are *Primarily Labour Markets* and that *Large labour markets are more productive than smaller ones*. He states in 'Cities as Labour Markets'<sup>7</sup>:

*Large cities generate scale economies that allow enterprises to reduce their costs by increasing output, thereby reducing costs per unit. Scale economies are only possible in cities with a large labor market. When many related activities are located in close proximity, they generate what economists call "knowledge spillovers."*

Bertaud cites mobility and affordability as the key factors that allow a location to maximise its potential in the context of that market.

*"Mobility" is the ability to reach any area of a metropolitan area in as short a travel time as possible, and "affordability" is the ability of households and firms to locate in whichever area they deem will maximize their welfare. Increasing mobility and affordability are the two main objectives of urban planning. These two objectives are directly related to the overall goal of maximizing the size of a city's labor market, and therefore, its economic prosperity.*

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<sup>7</sup> Bertaud, Alain (2014) Cities as Labour Markets, NYU Marron Institute of Urban Management

### 4.2.1 National Labour Force Data

At a national level it is important to highlight that this review takes place against the context of a regional economy that is at full employment. This is important in that it presents a counter-intuitive perspective. It raises a potential issue that if 20,000 sq.m. were built tomorrow by successful businesses, there wouldn't be sufficient workforce to occupy them.

There were 2,704,200 persons aged 15-89 years in the labour force in Q1 2024, using standard International Labour Organisation (ILO) criteria. This represented an increase 1.9% over the year. (Source: CSO).

The CSO<sup>8</sup> comment in respect in the 2023 Q3 statistical release that, *the number of people in the labour force is influenced by changes in the size of the working age population (the demographic effect). Up to late 2008, this demographic effect added at least 30,000 to the labour force each year, driven mainly by immigration, peaking at 90,500 in Q2 2007.*

*The positive demographic effect started to fall in the second half of 2007 as immigration decreased. It continued to fall in 2008 and 2009 and was negative between Q3 2009 and Q1 2014. The demographic effect turned positive again in Q2 2014 and has remained positive since then, contributing an increase of 59,500 to the labour force in the year to Q3 2023.*

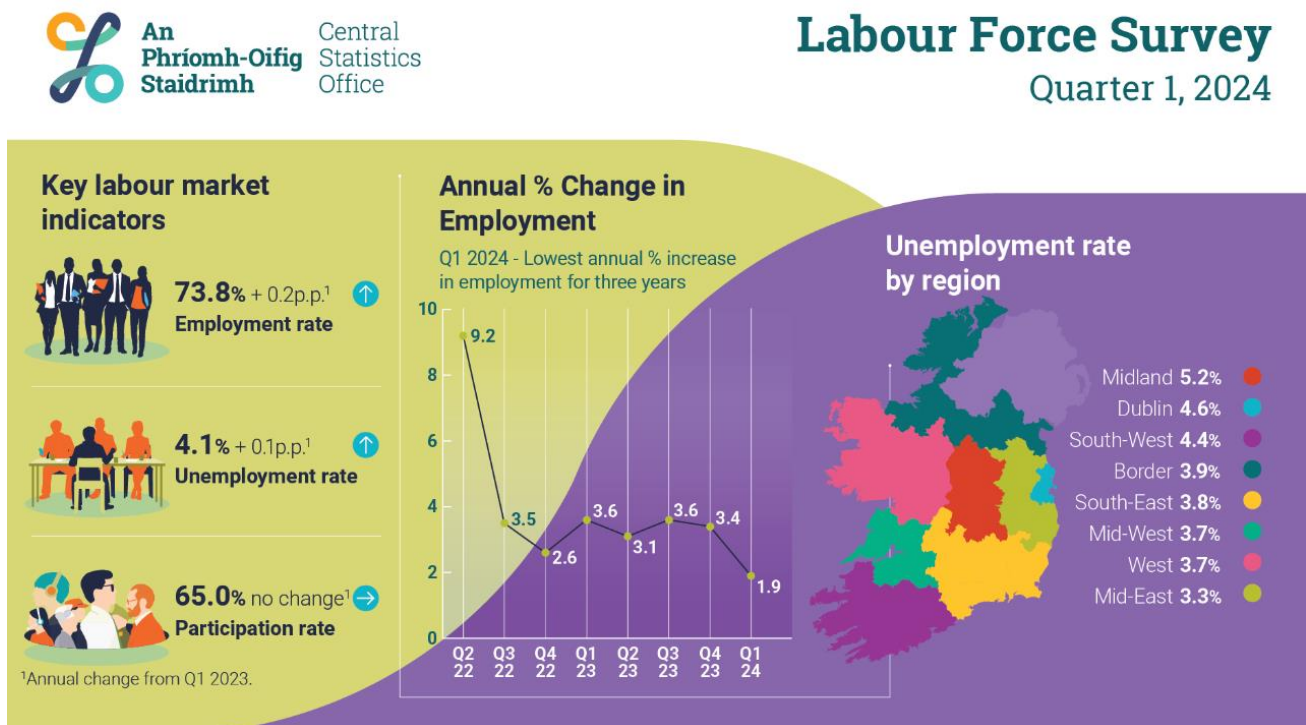


Figure 17 Labour Force Survey Q1 2024 Infographic

**The ESRI Q4 Quarterly Economic Commentary, Winter 2023 (December 2023)** notes:

<sup>8</sup> <https://www.cso.ie/en/releasesandpublications/ep/p-lfs/labourforcesurveyquarter32023/labourforce/>

**After the strong recovery from the COVID-19 pandemic, the labour market has been operating close to capacity since winter 2022. In Q3 2023 the unemployment rate increased to 4.5 in Q3 2023 and stood at 4.8 per cent in November 2023, after being below 4.3 per cent during the first three quarters of the year**

*The increase in working age population is reflected in the Labour Force Survey for Q3 which suggests the labour force increased by 4.0 per cent compared to Q3 2022. Female employment has increased by 6.0 per cent whereas male employment has increased by 2.3 per cent. The data also reveal that in Q3 2023 there were more people employed in Ireland than ever before. Figure 17 displays this clearly, namely the strong recovery from COVID-19, and shows that employment is continuously growing ever since. These findings underline the argument that unemployment is mainly increasing due to re-classification of those deemed to be unemployed and not due to a decline in labour demand.*

*Further data included in the Labour Force Survey indicate that between the 15-24 years, 25-44 years, and 45 and older age groups, the middle age group has seen a relatively strong increase in employment numbers, after stagnating since the second quarter of 2022. The employment figures for the oldest age group have fallen slightly.*

*Despite inflation moderating and decreasing vacancies, the possibility of tight labour markets leading to wage pressure still remains. The high employment numbers show that the labour market is acting at capacity, which is why wage pressure remains high.*

### **Population growth and its implications**

*Recent demographic figures released suggests that the pace of population growth is somewhat larger than had been previously expected. There are a number of reasons for this; the pace of growth in the domestic economy has attracted a significant degree of net inward migration while the war in the Ukraine has seen a further rise in population over and above what had previously been forecast.*

*A significant increase in population has significant implications across a number of areas not least of which is the demand for housing. As has been previously documented in the Commentary and other ESRI publications, housing supply has struggled to keep pace with the surge in demand which has accompanied the recovery of the domestic economy after the global financial crisis (GFC). While housing output has increased in the current year, demographic factors are likely to have pushed the level of housing demand further than past estimates. The 2022 Census of Population, and new migration data, provide an opportunity to revisit previous estimates, with work in this space currently underway in the ESRI. It is critically important that any revised estimates be evidence-based and subject to peer-review and academic scrutiny. Any revised estimates notwithstanding, it is likely that housing supply will need to continue increasing for the foreseeable future to cater for the growing population.*

## **4.3 Local Economic Profile**

Dún Laoghaire-Rathdown Socio-economic Statement 2023-2028 provides a useful profile of the county summarised in the Figure below. It is notable that much of the census employment information is based on 2016, which is due to be updated as data becomes available for workplace zones from the 2022 census. Information, has been updated by from the Census 2022 Results (Profile 7 - Employment, Occupations and Commuting, December 2023) where available.

Dún Laoghaire-Rathdown Socio-economic Statement notes the following:

- Dún Laoghaire-Rathdown County (DLR) is located between the outer suburbs of Dublin City and the Dublin mountains. It has a population of 233,457 according to the 2022 Census.
- The County covers the electoral areas of Blackrock, Dundrum, Dún Laoghaire, Glencullen-Sandyford, Killiney-Shankill and Stillorgan. Although the majority of the population in the county is urban, there are three designated rural electoral divisions – Glencullen, Tibbradden, and Shankill-Rathmichael. A new town, the biggest urban infrastructure in the country is being built at Cherrywood.
- DLR has a highly educated and skilled labour force, and there are currently over 95,000 people [106,500 in 2022] in employment. This is **primarily driven by Sandyford Business District** and larger towns such as Blackrock, Dún Laoghaire, Dundrum and Stillorgan. Major employers include international IT and pharmaceutical companies, as well as financial and service industries. Dún Laoghaire-Rathdown has excellent access to educational facilities and is home to UCD, Ireland’s largest university, which together with IADT, provides third level education to 32,000 students per year.

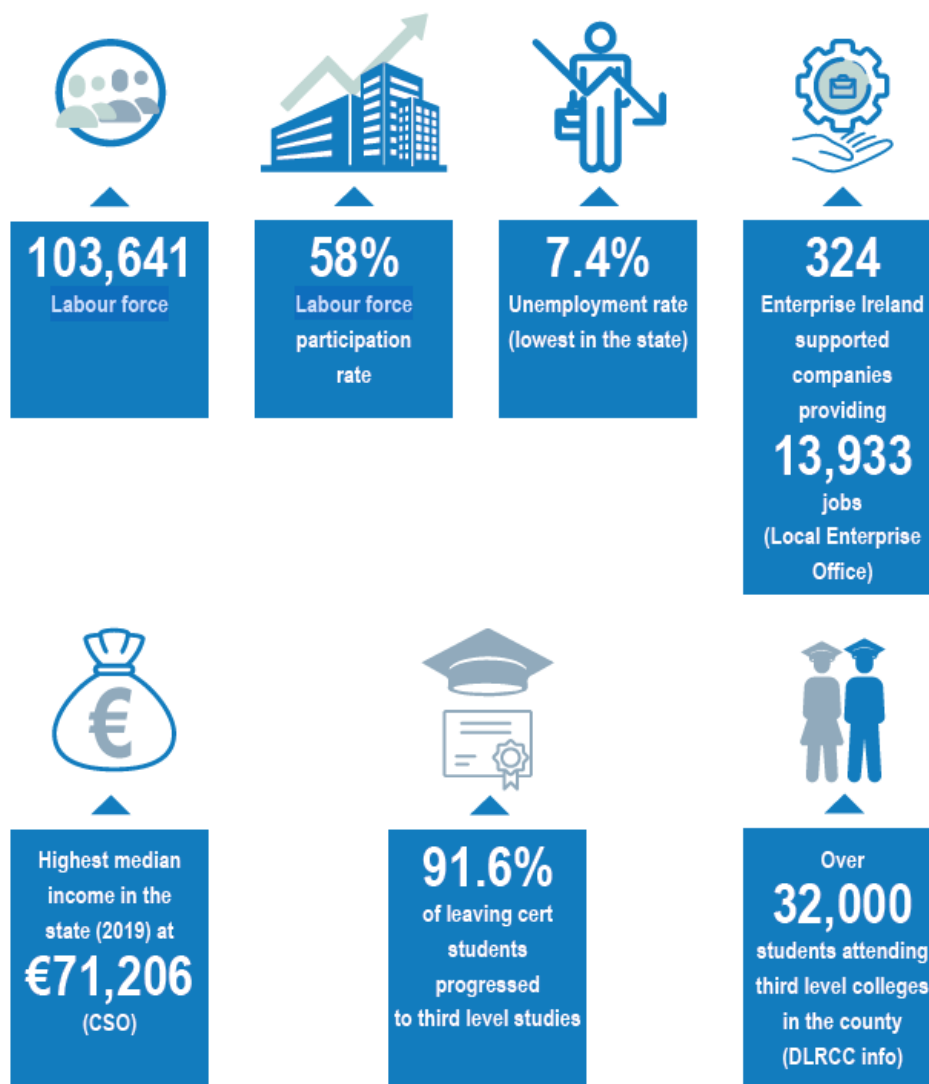


Figure 18 Dún Laoghaire-Rathdown Economic Profile (Source: Dún Laoghaire-Rathdown Socio-economic Statement 2023-2028)

- Based on 2016 Census data there were 92,909 jobs in DLR and a labour force of 103,641 people. This provides a comparatively positive and sustainable 'Jobs Ratio' for DLR of 0.9.
- **Of the 92,909 jobs in the County, DLR residents occupied approx. 53% or 48,963 of these jobs, while there were significant inflows of workers into the County from Dublin City (14,237), South Dublin (9,827), Wicklow (8,346) and Fingal (3,768).**
- Data from Census 2016 shows there were approximately **95,925 people resident in DLR who were at work**, an increase of 9.6% from 87,490 in 2011. Census 2022 states this figure is now **106,500 people in the labour force.**
- In terms of employment outflows, the single **largest employment destination outside of the County was Dublin City where a total of 34,291 DLR residents travelled to work.** This outflow is considered relatively sustainable in the context of the primacy of Dublin City as an employment location and the proximity and availability of sustainable modes of transport connecting DLR with the City Centre.
- Census 2016 data indicates that, **at 58%, DLR has a relatively low labour force participation rate.** This reflects the higher proportion of people in the retired age cohorts and the large student population in the County (Census 2016).
- In the **2022 Census, the labour force participation rate** in Dublin City was 65%, including 60% for females and 70% for males, meaning it had the highest participation rate for females and second highest overall rate nationally. **In Dún Laoghaire-Rathdown the overall rate was 59%**, including 54% for females and 65% for males.
- **DLR recorded the lowest unemployment rate in the State** for both Census 2011 (11.2%) and Census 2016 (7.4%). **In the 2022 Census, Dún Laoghaire-Rathdown had the joint lowest unemployment rate nationally at 6%, and the joint lowest long-term unemployment rate at 3%.**
- Over 47% of DLR residents aged 15 years and over, that have ceased education, have completed an Ordinary Bachelor's Degree or Higher and this is significantly higher than the comparable rate for the State (26.5%).
- **91.6% of leaving cert students progressed to third level** studies according to the 2016 census. This is significantly higher than the other Dublin local authorities.
- **DLR contains several third level and further education institutions including UCD, with c. 30,000 students,** IADT with c. 2,500 students, Smurfit Business School, the Dún Laoghaire Further Education Institute, and the Irish Management Institute.
- Census 2016 confirmed the continuing trend in the County towards a **high proportion of residents employed as managers/ professionals.** In 2016, DLR had the highest proportion (26%) of persons classified as Employers and Managers (Socio-Economic Group A) in the State. When combined with those employed as higher and lower professionals (Socio-Economic Groups B and C) this cohort **increased to 56% of all residents in the County (Census 2016).**
- The occupational composition of the County is characterised by a **significant number of residents employed in the knowledge economy and high-value growth sectors.** In 2016, there were 11,232 DLR residents employed in Professional, Scientific and Technical Activities followed by 10,934 DLR residents employed in Financial and Insurance Activities. The largest growth sectors between 2011 and 2016 were the Information and Communication sector which saw an additional 2,108 DLR residents working in this profession, followed by Professional, Scientific and Technical Activities, which saw an increase of 1,785 workers. (Census 2016).
- At the end of 2021, **DLR had 324 Enterprise Ireland supported companies.** The majority of these companies (accounting for 70% of the employee numbers) operate in the Digital Technologies, Fintech/ Financial & Business Services and Hi-Tech Construction & Housing sectors. These Enterprise Ireland supported companies provide 13,933 jobs.

- There are **63 IDA client companies** located in the County, operating primarily in the financial services, software, ICT, and medical devices sectors. These companies represent significant foreign direct investment in DLR.
- DLR has an emerging social enterprise sector, and work is currently underway on the development of a Social Enterprise Strategy for the County.
- Dún Laoghaire harbour welcomed almost 70 cruise ships from April to October 2022 with over 90 ships expected in 2023.
- 67,575 households have internet access and 7,041 do not have internet access (Census 2016).
- In 2019, Dún Laoghaire-Rathdown recorded the highest median household income in the State at €71,206, more than double that of the lowest (Donegal recorded a median household income of €34,655). Median household income in DLR was 12.5% higher than Fingal which had the second highest level in the State. It is noted, however, that household income in DLR is not distributed evenly across the County. In 2016, 11 Electoral Divisions recorded a gross median household income less than €50,000, while 7 Electoral Divisions recorded a gross median household income greater than €85,000. (CSO)
- DLR includes areas of high socio-economic deprivation. Thirty-three of the 760 Small Areas in DLR are classified as disadvantaged or very disadvantaged. This accounts for a population of 10,289 or 4.7% of the total population. In these areas unemployment level is 21.4%. Twenty eight per cent of the population aged 15+ has had education to Primary level only, 44.3% are living in social housing and the lone parent ratio 42.4%. (Pobal Index).

In 2022 Dún Laoghaire-Rathdown had more than 85,900 in full-time employment while over 13,600 were working part-time. Almost 14,000 people worked in professional, scientific and technical activities.

In 2022 in Dún Laoghaire-Rathdown almost 39,900 people never worked from home while just over 60,300 people did so at least part of the time, giving it the highest rate nationally of people who worked from home at least part of the time. Of those working from home, almost 17,800 people worked from home for five days a week, while nearly 11,700 did so for 3 days and just over 10,000 people worked from home for 2 days a week.

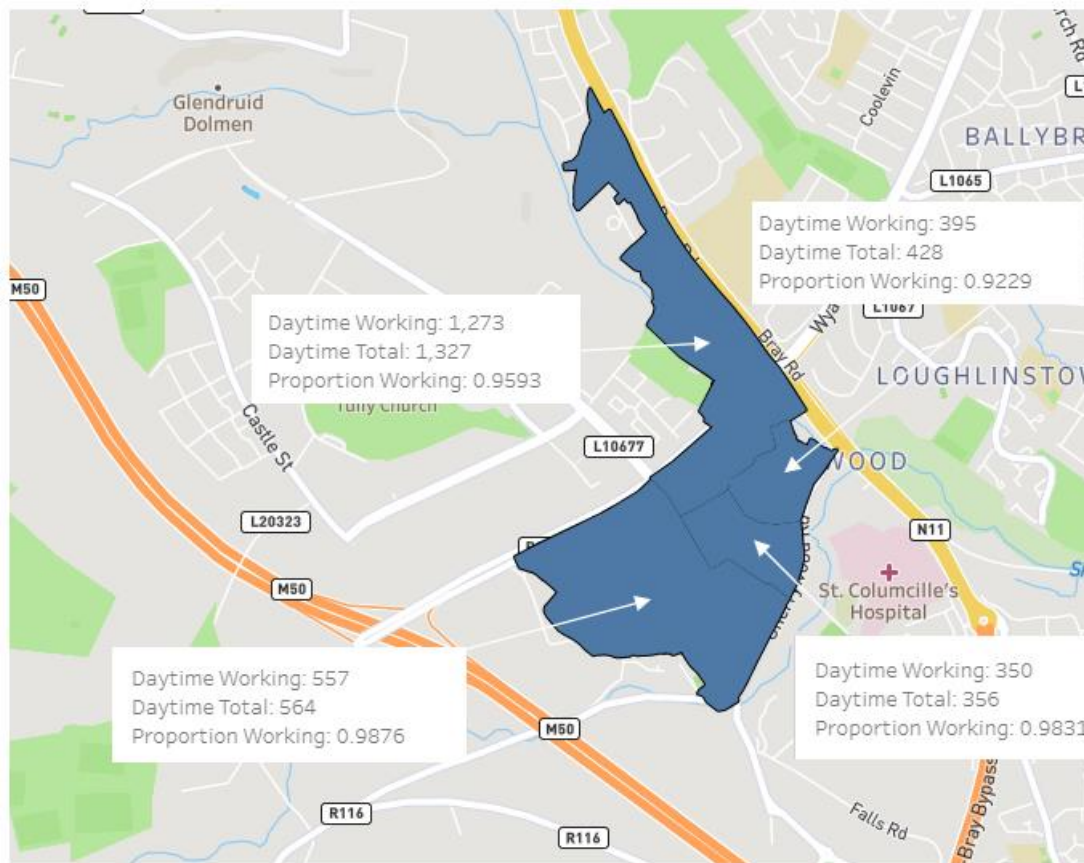
In 2022 in Dún Laoghaire-Rathdown half of the 86,000 daily commuters drove to work by car. Over 13,000 used a train/DART/Luas while almost 7,900 went by bus. Commuters in the county were the most likely to use the train, at 15%. In terms of active travel, nearly 6,900 people walked to work while just under 6,400 people cycled.

#### 4.3.1 Cherrywood Profile.

The number of jobs within Cherrywood can be established from the POWCAR data. With the relevant zone, as identified in Figure 19, there were a total of 2,575 persons working there.

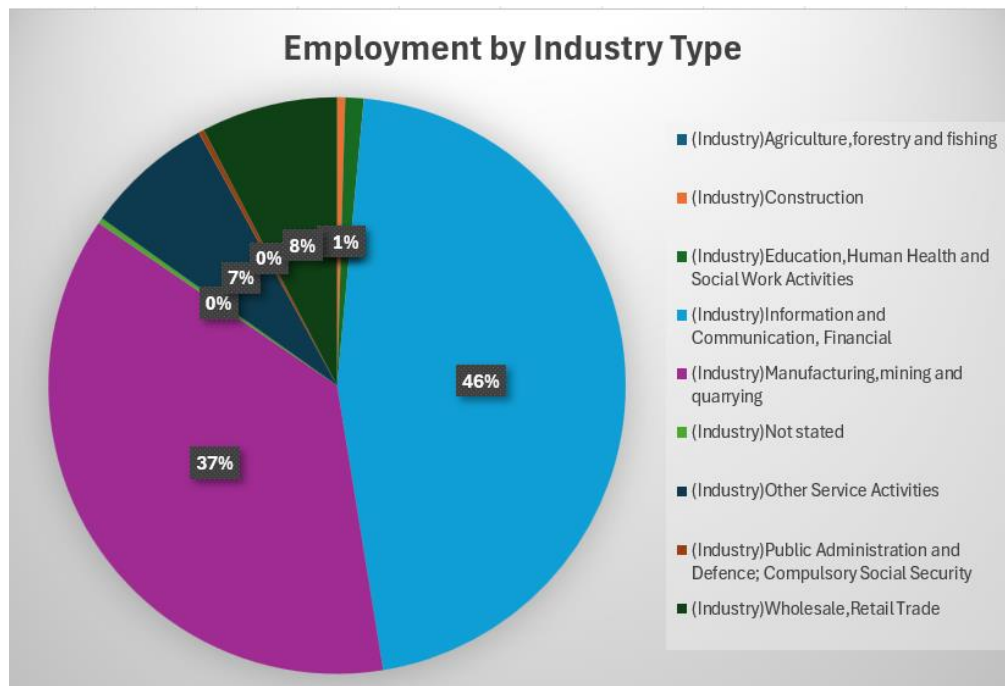
The breakdown on those jobs by industry is provided in Figure 20. The predominant industry is Information and Communication, Financial (46%).





**Figure 19: Cherrywood Employment Zone**

Source: CSO Workplace Zones (2016)



**Figure 20: Cherrywood Jobs Breakdown**

Source: CSO

These figures can be compared with other the scale of other economic zones in the Greater Dublin Area, namely

- The City Edge
- Dublin Airport
- Sandyford
- Tallaght
- Grangecastle
- Dublin Docklands.

**Table 9: Dublin Industrial Estate Comparison with other Locations**

Location	Primary Industry Group	No. of Employees	% of Total Employees
<b>Cherrywood</b>	Information and Communication, Financial	2575	46.0%
<b>City Edge</b>	Wholesale/Retail Trade	10,139	40.4%
<b>Dublin Airport</b>	Wholesale/Retail Trade	9,551	76.1%
<b>Sandyford</b>	Information and Communication, Financial	10,773	59.3%
<b>Tallaght</b>	Education, Human Health & Social Work	5,272	26.1%
<b>Grange Castle</b>	Manufacturing	1,886	56.6%
<b>Dublin Docklands</b>	Information and Communication, Financial	14,020	78.7%

Source: CSO Workplace Zones

It can be seen that the Cherrywood is not of the scale of other employment clusters. Currently, it provides for a more localised function serving the needs of the area and this part of the City. However, its' primary sectoral grouping of Information and Communication, Financial (46% of the total number of jobs) is consistent with the profile of the large commercial centres of Docklands and Sandyford.

## 5. MACRO-ECONOMIC FACTORS

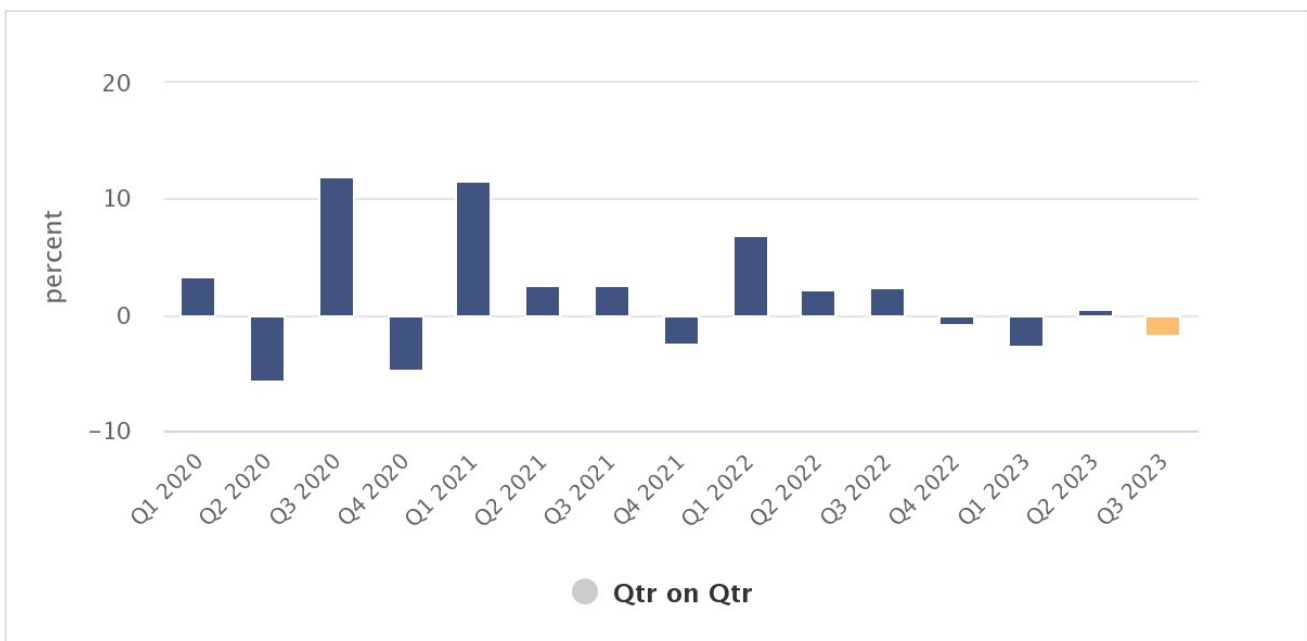
### 5.1 Introduction

This section considers the macro-economic profile for the development of the lands which are set within a county and regional context. Macro-economic drivers for national and regional growth are reviewed, in addition a consideration of emerging trends that affect brownfield development and a review of potential growth sectors that may be appropriate for development of the area.

### 5.2 Macro-economic Drivers

#### 5.2.1 Economic Growth

Gross domestic product (GDP) is usually used as an indicator of how the domestic economy is performing. Following a number of years of rapid, multinational export-led output growth, in the first quarter of 2023 the Irish economy entered a technical recession, which is defined as two consecutive quarters with negative GDP growth rates. It subsequently rebounded in Q2 2023, with a growth rate of 3.8% but subsequently declined again by 1.8% in Q3 2023. The result was driven mainly by decreases in the multinational dominated sectors in Q3 2023. Using the early estimate for Q3 2023, GDP is estimated to have decreased by 4.7% when compared with the same quarter in 2022.



**Table 10: Seasonally adjusted DGP Growth Rate (% change of previous quarter)**

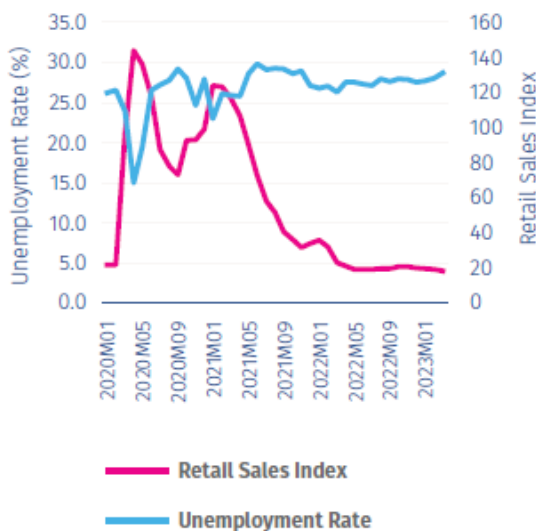
Source: CSO/ESRI

The CSO provide data on regional and county GDP, but this primarily dates from 2020. GDP in Dublin continued to rise compared with other regions. The Dublin NUTS2 region recorded the highest GDP in the state at €157.2 billion. The Information & Communication sector was the largest contributor towards GDP in Dublin. Dublin City and County is the only region where disposable income per person is significantly above the state average. Dublin has the largest disposable income amounting to €27,686 per person, income has risen to 18% above average and has increased for the third consecutive year.

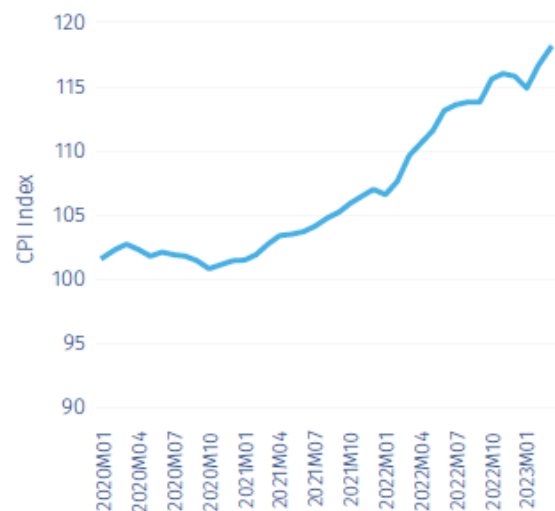
### 5.2.2 Consumer Prices, Unemployment and Retail Sales

There are three important indicators of the health of the economy and its drivers: monthly unemployment rate, the monthly consumer Retail Sales Index, and the monthly Consumer Price Index (CPI) published by the CSO. These indicators provide a guide for developments in the domestic economy and developments in the labour market, in particular, are generally good predictors of demand side pressures in the housing market. Ireland’s labour market continued to perform strongly throughout the first quarter of 2023; in March 2023, the unemployment rate stood at 4.0 per cent, but subsequently rose to 4.9% in December 2023. The Retail Sales Index stood at 131.1 in March 2023, 10.7 index points above its value a year previous (120.4).

#### Retail Sales & Unemployment



#### CPI



**Table 11: Trends in Retail Sales, Unemployment, and Consumer Price Index**

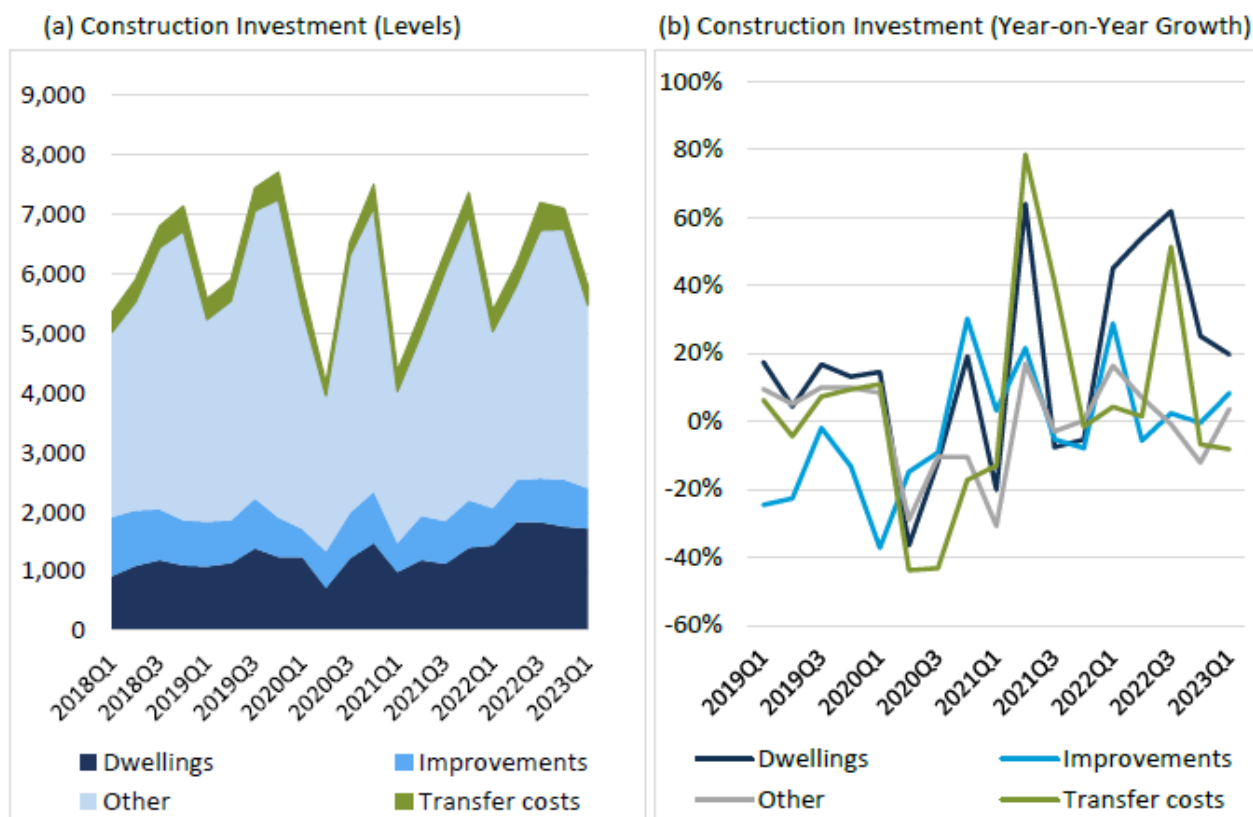
Source: CSO/RTB

This large year-on-year increase in the volume of retail sales, while positive for the outlook of the domestic economy, likely reflects the cost-of living pressures observed in Ireland throughout 2022, which dampened the consumer outlook then. After several months of falling consumption levels in 2022, the volume of retail sales has seen strong growth since the beginning of 2023. Overall prices in the economy continued to increase with annual growth in the CPI stood at 7.7 % in March 2023, but has subsequently reduced to 5.1% in October 2023.

### 5.2.3 Housing Investment and Output

Over the past number of years, there have been a range of headwinds and challenges which have affected the provision of housing output. The COVID-19 pandemic disrupted activity due to the public health measures, and the ensuing international supply chain bottlenecks caused inflationary pressure in terms of the cost of construction. The onset of the war in Ukraine further exacerbated inflationary pressures in the construction sector with many raw material prices rising and supply chains becoming further strained. The impact of the recent conflict in the Gaza Strip is at this stage uncertain. Despite these challenges, investment in construction has begun to recover (as shown in Table 12). Dwelling investment grew at 20 % year-on-year in Q1 2023 while

other construction and home improvements are also on an upward trajectory on an annualised basis. The rising cost of financing is also likely to act as a drag on investment activity in construction. However, it is also likely to tighten credit demand for mortgage borrowers who face higher debt servicing costs and lower borrowing capacity.



**Table 12: Construction Investment**

Source: CSO/ESRI

The well documented undersupply of housing in Ireland, by contributing to higher housing costs, is adversely impacting competitiveness and household formation in the domestic economy. The lack of housing in suitable locations is now acting as a deterrent to FDI. The ESRI in its Quarterly Economic Commentary (Summer 2023) expect housing completions to number approximately 27,000 in 2023, rising to 30,000 in 2024.

### 5.3 Emerging Economic Trends

#### 5.3.1 Deglobalization

Deglobalization refers to a trend where countries reduce their reliance on international trade and cooperation, opting for more self-sufficiency and protectionist measures. The implications of deglobalization for Ireland, like any other country, can be complex and multifaceted. Ireland is a small, open economy that has benefited significantly from global trade. Deglobalization could lead to a decline in international trade, impacting Irish exports and imports. This may particularly affect sectors heavily reliant on global markets, such as pharmaceuticals, ICT technology, and agriculture.

Ireland has attracted substantial foreign direct investment due to its favourable business environment. Deglobalization may lead to a decrease in cross-border investments as companies reevaluate their global strategies. This could impact economic growth and job creation. Deglobalization may lead to a reconfiguration of global supply chains. If countries prioritize domestic production over international cooperation, it could disrupt existing supply chain networks. Irish industries with complex supply chains may face challenges in adapting to these changes.

On the positive side, a shift towards more regional or domestic supply chains could enhance Ireland's resilience to global economic shocks. However, it may also increase costs for businesses that have relied on cost-effective global supply chains. Government policy may need to adjust its economic policies to navigate the challenges posed by deglobalization. This could involve measures to promote domestic industries, stimulate innovation, and diversify the economy.

Economic changes associated with deglobalization could have social implications, such as shifts in employment patterns and income distribution. Government policies may need to address potential social challenges arising from these shifts.

### 5.3.2 Geopolitical Considerations

International geopolitical changes such as wars in the Gaza and the Ukraine, and events like Brexit can have significant impacts on urban regeneration, influencing economic, social, and spatial dynamics in cities.

Geopolitical changes can create economic uncertainty, affecting investor confidence. This uncertainty may result in fluctuations in funding for urban regeneration projects as investors and financiers become more cautious. Brexit has given rise to challenges in terms of access to UK markets, but also opportunities such as development of independent supply chains.

Changes in migration policies, such as those related to Brexit, can influence the movement of talent and workforce. Cities may need to adapt their regeneration strategies to attract and retain skilled workers, considering factors like visa regulations and the attractiveness of the city for international talent. The level of immigration resulting from these geopolitical events which experienced in the last several years is in excess of that originally envisaged in the NPF. The population forecasts in the NPF Roadmap (July 2018) were based on a net immigration rate of 33,000 persons per year. However, the average over the last five years was 48,950.

Geopolitical changes will lead to shifts in global economic power. Cities engaged in urban regeneration face increased competition for investment and talent as the global economic landscape evolves.

### 5.3.3 Working from Home

The COVID-19 pandemic forced millions of people around the world to switch from office working to working from home almost overnight. Despite the gradual easing of lockdown restrictions, the pandemic has created a 'new normal' working culture, whereby employees want more flexibility in terms of their working location and hours. In Dublin City, according to the 2022 Census almost 130,600 people stated they never worked from home while almost 119,800 people worked from home at least some of the time. Of these over 35,000 people worked from home for five days per week, with almost 23,000 doing so for three days and just over 21,000 working from home for two days each week. A survey conducted in the summer of 2021 has unveiled a notable trend among office workers favouring continued work-from-home. Approximately three-quarters of the surveyed Irish office workers preferred some form of ongoing working from home, particularly favouring hybrid models. The survey



also highlighted regional differences in working from home preferences. In the Greater Dublin Area (GDA), there was a distinct preference for a mostly-at-home work setup. Among those capable of working from home in the GDA, only 10.6% preferred to work full-time from the office. Outside the GDA, this figure was slightly higher at 12.9%.

A report *An Evaluation of the Impacts of Remote Working* (Department of Enterprise, Trade and Employment, 2022) concluded that there were significant labour force benefits arising from this recent trend. The evaluation found evidence to suggest that housing demand in more rural regions outstripped that of cities, at least in 2021. The evaluation found there to be an inverse relationship between recent house price and rent growth, and population density.

However, it is evident that the working from home trend has led to a decreased immediate need for traditional office space. Many businesses have adopted hybrid or fully remote models, reducing the demand for large office footprints. Some businesses are opting for flexible office spaces, co-working arrangements, or hot-desking solutions instead of traditional long-term leases. Despite the rise of remote work, certain industries, especially those driven by innovation and collaboration, may still prefer to operate in physical proximity. Innovation hubs and clusters may continue to attract companies seeking a collaborative environment.

The impact upon the commercial office market is considered in further detail in the market analysis.

#### 5.3.4 Artificial Intelligence and Automation

Artificial Intelligence (AI) and automation technologies can enhance workplace efficiency, reducing the need for extensive office space. Tasks that were previously manual or time-consuming can be automated, potentially requiring fewer employees or a different distribution of tasks. As AI and automation technologies continue to advance, some job roles may be displaced or transformed. This could impact the size and composition of a company's workforce and, consequently, its office space requirements.

#### 5.3.5 Decarbonization of Economies

The decarbonization of the economy, which involves reducing carbon emissions and transitioning to cleaner, more sustainable energy sources, can have significant impacts on urban development. These can relate to:

- Adapt their infrastructure to incorporate renewable energy technologies, such as solar panels on buildings or wind turbines in urban areas.
- The integration of smart grids can optimize energy distribution, allowing for better management of renewable energy sources and promoting energy efficiency within urban environments.
- Electrification of Transportation through EVs, Luas and DART
- Urban Design for Walkability reduce the dependence on cars, thus lowering carbon emissions associated with traditional transportation.
- Energy-Efficient Buildings through net zero building design
- Decentralized energy systems through localized and decentralized energy systems, such as district heating and cooling, can play a role in reducing carbon emissions from traditional energy sources.
- Climate-resilient urban design through the development of green spaces, water management systems, and other measures to address climate-related challenges.

- Enhanced digital infrastructure through the integration of digital technologies and data-driven solutions can enhance energy efficiency, optimize transportation systems, and improve overall urban sustainability.

In summary, the decarbonization of the economy can serve as a catalyst for transformative changes in urban development, influencing infrastructure, transportation, building practices, waste management, and social equity. A holistic and integrated approach to urban planning is essential to successfully navigate the challenges and opportunities associated with a low-carbon future.

## 5.4 Potential Growth Sectors

### 5.4.1 Overview

There are several potential growth sectors which may need to be accommodated within the city. The *City Edge – Economic Strategy* (SDCC & DCC, May 2022) identified those that may be appropriate within the redevelopment of the City Edge. Some of these sectors are not applicable to the HEI zoning, however it is relevant to not where there is growth in the market.

### 5.4.2 Logistics, Distribution and Storage

According to a report *Focus on Transport and Logistics* (The Department of Business, Enterprise and Innovation (“DBEI”), August 2020), the global freight transport and distribution and logistics services sector, accounts for 108,000 jobs in Ireland, or 5% of total employment. The overall Transport and Storage sector accounted for 2% GVA in 2018 approximately half of which is located outside Dublin.

There has been growth in the e-commerce driven logistics and delivery industry. Pre-pandemic, technology was dramatically transforming the sector. Both from the use of data analytics to improve performance and serve customers better through improved forecasting, to scale capacity up or down and plan routes. In addition to this, artificial intelligence and machine learning techniques can deliver dynamic routing and connected autonomous vehicles present further potential efficiencies for the sector. Companies in Ireland have increased headcount during the pandemic. Some elements of the sector are doing very well due to changed consumer buying behaviours.

It is very unlikely that warehousing and distribution has a role to play in the future development of the area.

### 5.4.3 Urban Workspace

Urban workspace covers a wide variety of uses such as shared/private office space for business start-ups, lab space, maker space, incubator space, creative space/facilities, maker space for shared technical or workspace facilities for physical making or production of goods. The pandemic has resulted in a re-thinking of the traditional ‘office’ which has given rise to new types of flexible workspace models for variety of business typologies.

It may not be considered a particularly high value use and therefore inclusion within a mixed-use area is likely to be driven by policy requirements as opposed to market demands. It is a use that may be suited to co-location and integration into new redevelopments.

#### 5.4.4 Medical Technology (MedTech)

The World Health Organisation describes this sector as being the "*application of organised knowledge and skills in the form of devices, medicines, vaccines, procedures, and systems developed to solve a health problem and improve quality of lives.*" For Ireland, the sector is mainly driven by the continued support and investment in start-ups, who in turn then get acquired by large multi-nationals. Manufacturing is still considered to be a dominant area of focus.

The MedTech sector has grown in Ireland from just 50 companies in the early 1990s to become one of the industry's leading global hubs with a cluster of 350 companies employing 38,000 people. This makes Ireland the largest employer of MedTech professionals in Europe per capita. Ireland is also the second largest exporter of MedTech products in Europe, with annual exports of €12.6 billion to over 100 countries globally. It is a high value use, which is often associated with clusters associated centred around a larger manufacturing facility.

#### 5.4.5 Business and Professional Services

The Business and Professional Services sector is quite diverse and includes employment groups across a number of broad categories such as facilities management, business process outsourcing, IT/digital services and outsourced public services, for example,. Professional services can include the following employment groups: architects, accountants, engineers, solicitors, property, and construction. It is generally a high value use suited to colocation in a mixed use redevelopment. One of the principal issues will be competition in the market place from other attractive locations in the city.

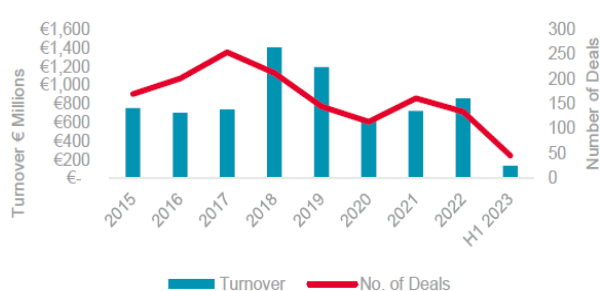
## 6. MARKET REVIEW

### 6.1 Introduction

This section provides a market review of different sectors that may be considered for development within the study area. It considers demand, supply, prices, buyer profile and rents.

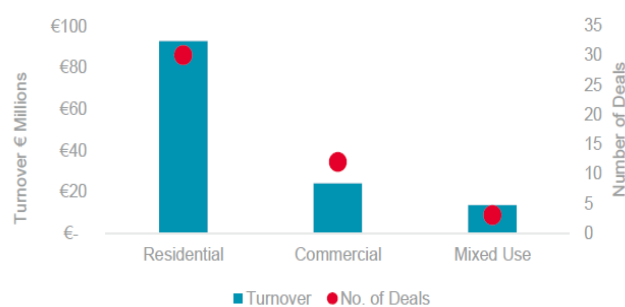
### 6.2 Development Land Market

Activity in the development land segment was subdued in the first half of the year with approximately €130m worth of transactions across 45 deals, down 67 from €390m in the first half of 2022 and below levels seen during the height of the COVID pandemic in 2020.



**Table 13: Land Market Activity 2015-H1 2023**

Source: Cushman & Wakefield



**Table 14: Sector Breakdown by Turnover H1 2023**

Source: Cushman & Wakefield

The GDA hinterland remained a popular geographic location for residential deals in the first half of the year. There were approximately 63 of all residential deals were in the GDA. Commercial development site deal activity was weak in the first half of 2023 with just under €24m in deals taking place.

The European Central Bank continued to increase interest rates in the first half of the year, but inflation rates have eased of late, providing some optimism that interest rates are close to peaking and indeed at the time of writing investors are pricing in modest interest rate cuts in 2024. This has dampened activity. Meanwhile construction costs are beginning to even out now but at elevated levels compared to recent years.

Land values for industrial land are c€4m per hectare. A group of buildings at 85-87 Lagan Road, Dublin Industrial Estate recently sold for €[insert] and was marketed as having residential redevelopment potential.

However, residential lands value vary hugely across the GDA. A landholding of 3.88 Lands on Griffith Avenue has sale agreed at €35m<sup>9</sup>. The LDA has been extensively involved in land purchases, recently completing purchase of 13.2 ha for €44m at Clongriffin. These were previously held by NAMA.

<sup>9</sup> Price to be confirmed.

### 6.3 Construction Costs

The table below illustrates average construction costs per square metre for residential (houses, apartments), retail, industry and civic buildings.

**Table 15: Average Construction Costs January 2021- 2022**

Building Type	2021 Cost € per sqm	2022 Cost € per sqm	% increase
<b>Houses</b>	1,550-2,000	1,600-2,100	3%
<b>Apartments – suburban (3-4 storey)</b>	2,000-2,300	2,250-2,500	13%
<b>Apartments – urban (3-6 storey) O/B</b>	2,000-2,000	2,350-2,800	18%
<b>Shopping Centres – shell &amp; core</b>	1,250-2,020	1,400-2,250	12%
<b>Shopping – Mall</b>	2,350-4,300	2,600-4,800	11%
<b>Office – shell &amp; core</b>	2,500-3,800	2,800-4,250	12%
<b>Office – owner occupier</b>	2,600-4,000	2,900-4,500	12%
<b>Industry</b>	1,000-1,200	1,150-1,350	15%
<b>Hotel 3/ 4 star</b>	2,900-3,800	3,450-4,800	19%
<b>Leisure</b>	2,400-3,500	2,650-3,800	10%
<b>Car Park – surface</b>	120-450	135-450	13%
<b>Car Park – basement</b>	1,100-1,650	1,250-1,850	14%

Source: Mitchell McDermott 2022 and 2023

The above construction costs do not include site development works, local authority levies, finance costs, legal cost, estate agency costs or land costs. It should be noted that there was significant construction cost inflation during 2022. This is reflected in the above table. However, it is also highlighted that there cost increases vary depending on the type of development. So, housing costs have only increased by 3%, while apartment construction costs have gone up by 18%, hotel development costs by 19% and shopping centres by 12%. Basement car parking costs have increased by 14%. These are all development types that constitute the mainstay of town centre and urban development. This presents a significant challenge for private sector investment.

### 6.4 Commercial Office Market Trends

The commercial office property market has experienced significant challenges over the last year. The emergence of hybrid working, coupled with high interest rates, had seen a significant decrease in the value of the commercial property market.

Overall take-up in the Dublin office market in the third quarter of 2023 came in at approximately 29,000 sqn, down on the levels seen in the previous quarter with a total of 41 deals seen in the period. There was a broad spread of take-up across the various business sectors during Q3 with professional service and financial services accounting for just over half of take-up. Across the city take-up was heavily focused on the Central Business District (CBD) area which absorbed just over 70% of the Q3 total.

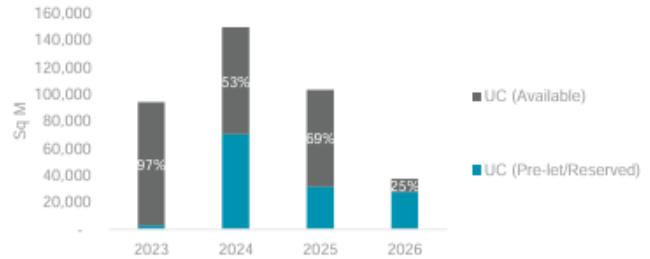
Headline vacancy rates remain elevated in the Dublin market with the rates for the CBD and Dublin market coming in at 13.8% and 15.2% compared to 14.6% and 14.9% respectively in Q2 2023. Although availability remains relatively elevated, we have not seen this impact upon prime office rents for buildings meeting the

highest standards from a sustainability and occupier demand perspective. In our view this is very much down to the demand for such buildings as well as the construction costs involved in delivering such stock. The Dublin office development pipeline at the end of Q3 stood at approximately 383,000 square metres, largely unchanged compared to the previous quarter. 94,000 sqm of this space is set for delivery by year end with a further 150,000 sqm coming on stream in 2024 although roughly half of this 2024 pipeline is reserved or pre-let. At the margin it is becoming clearer that 2024 deliveries are now being pushed out which reflects short and medium term uncertainties surrounding take-up as well as the construction cost inflation backdrop.



**Table 16: Rolling 12 Month Office Take-up**

Source: Cushman & Wakefield



**Table 17: Development Activity by Expected Completion Year, Q3 2023**

Source: Cushman & Wakefield

Rents in Q3 of 2023 in the city centre were average €700/sqm, €318/sqm in the south suburbs, €221/sqm in the northern suburbs, and €194/sqm in the western suburbs.

Prime office yields expanded by a further 15 basis points in Q1, as the market continued to adjust to a higher interest rate environment. Secondary and south suburban office assets have seen heavy price declines on a year-on-year basis, and while pricing on secondary assets did not move-out further in Q1, ongoing sale processes indicate that further yield expansion is likely.

**Table 18: Dublin Office Investment Yields**

	Yield End Q3 2023	Quarterly Change	Q1 2022-Q3 2023 Change
Prime Dublin	4.5%		+50bps
Secondary City Centre	6.5%	+25bps	+125bps
Prime South Suburbs	7.25%	+25bps	+175pbs

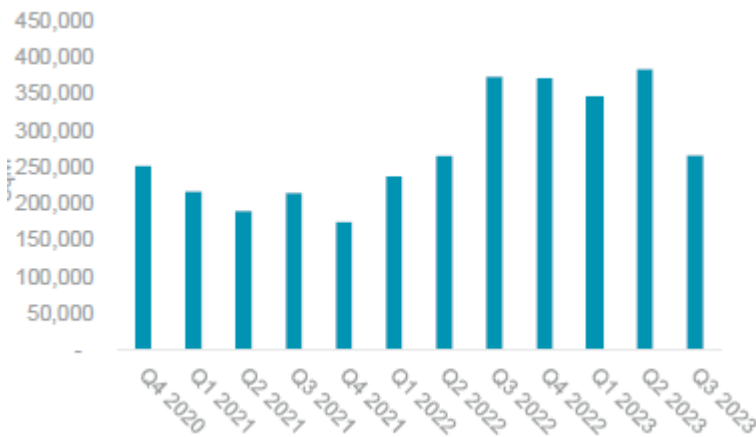
Source: CBRE Research

## 6.5 Industrial Market

Activity in the Dublin Industrial and Logistics market remained solid if unspectacular in a longer-term context in Q3 of 2023 with a total of approximately 62,000sqm of space taken up across a mix of 31 leases and sales<sup>10</sup>. On a rolling12-month basis Dublin take-up stood at approximately 265,000sqm the end of Q3. Slightly lower than average trends for the Dublin market. The vacancy rate stood at 5% in Q3 of 2023, which was very low by historic standards.

<sup>10</sup> Cushman and Wakefield Market Report Q3 2023





**Table 19: Rolling 12 month Take Up sqm Q4 2020-Q3 2023**

Source: Cushman & Wakefield

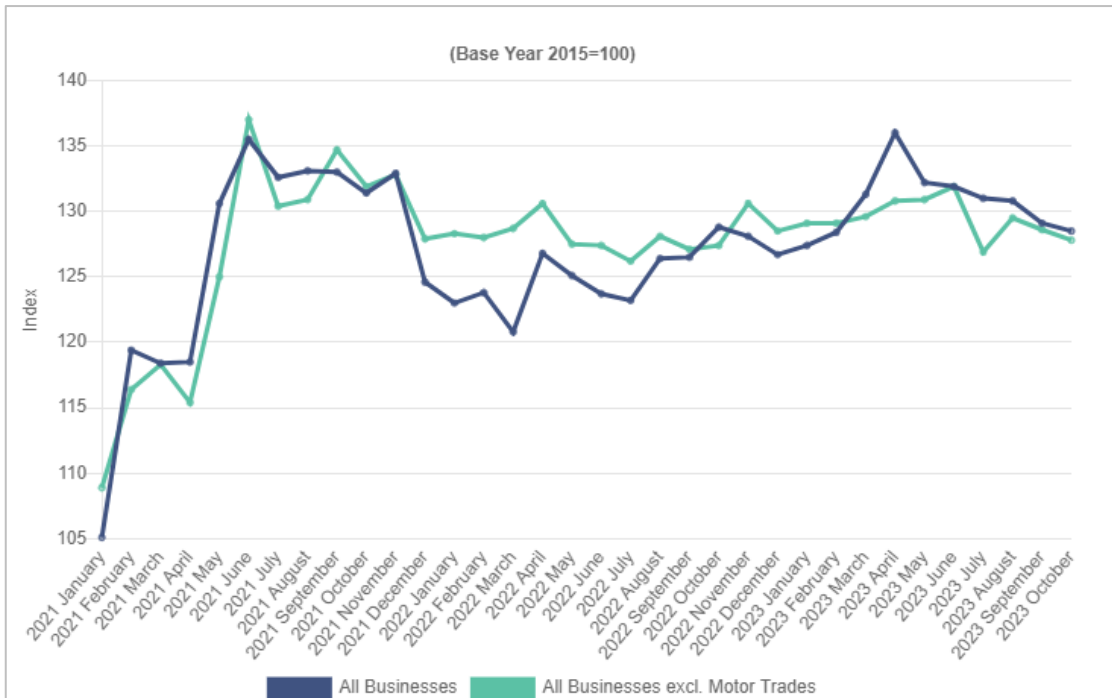
At the end of the third quarter approximately 146,000 sqm of space was under construction which even based on more modest take-up trends in Dublin barely meets annual demand. However, upon further examination the space under construction further, approximately 69% of it is either reserved or pre-let, again underlining the positive demand picture across the Dublin market.

Annual rents in the Dublin Industrial Estate are quoting at between €100/sqm and €130/sqm.

## 6.6 Retail

### 6.6.1 Retail Sales

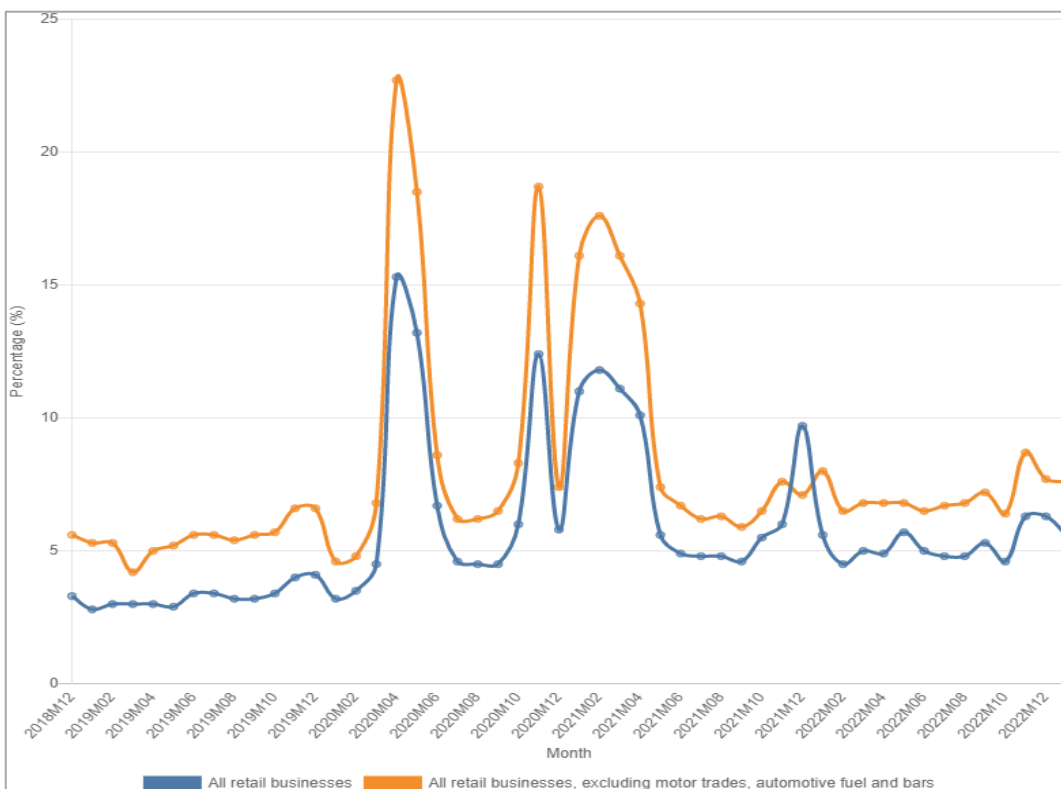
The retail sales volumes showed a dramatic decrease in January 2021 at the height of the COVID-19 lockdowns and this can be associated with the pandemic. It can be seen from the figure below that retail sales volumes have returned to and exceeded pre-COVID levels. The Index for all businesses excluding motors stood at 128.6, which is a 5.7% increase on pre-COVID levels. However, while the pandemic severely distorted trade patterns and volumes over the last 3 years, sales have stabilised since March 2022.



**Table 20: Retail Sales Index January 2020-October 2023**

Source: CSO

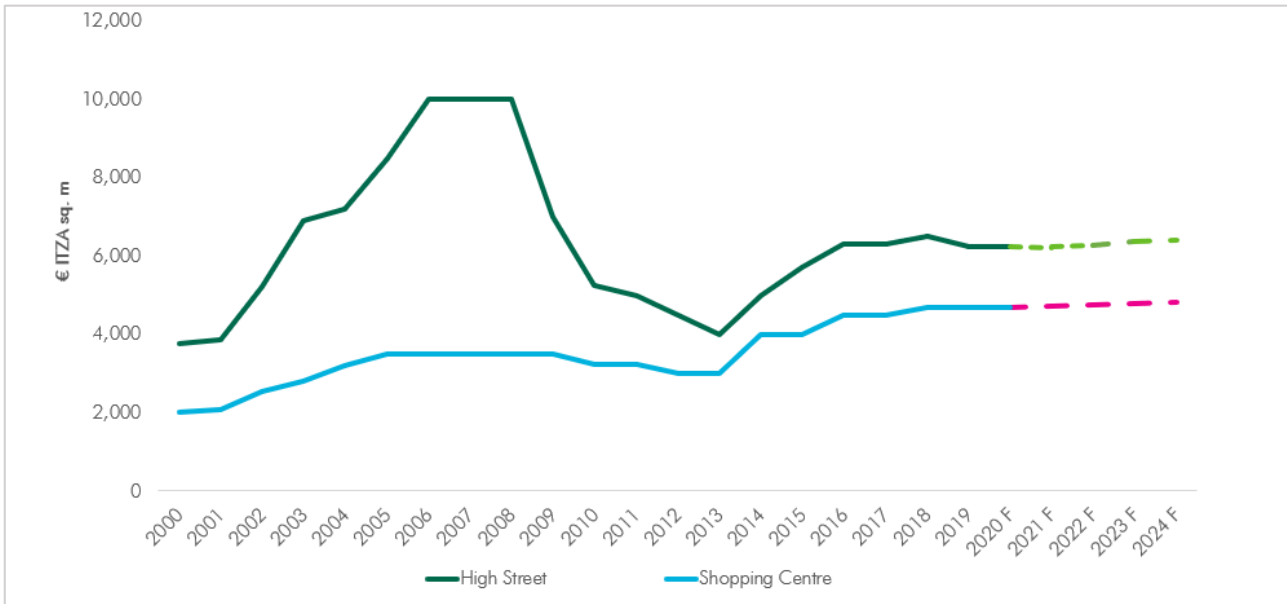
This data does not include sales from online-only retail but does include online turnover of physical retail outlets. The CSO has recently started to collect turnover generated by on-line sales. This is illustrated in the figure below.



**Table 21: Percentage of Turnover generated by Online Sales**

Source: CSO

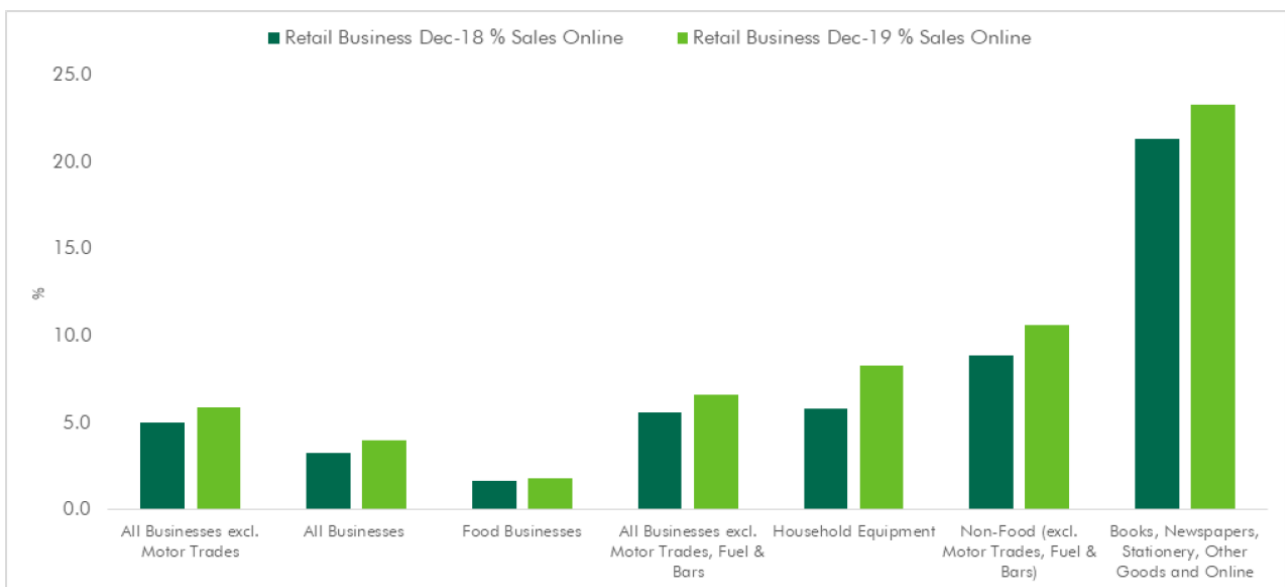
Pre-Covid19 Ireland, CBRE had forecast marginal growth in both the Prime High Street and Shopping Centre rents. (Figure 10). These forecasts have yet to be updated for the post-COVID scenario.



**Table 22: Growth in Prime High Street Shopping Centres**

Source: CBRE

Growth in online sales is a significant challenge for existing town centres and physical retail outlets. The figure below shows the trend in online retailing for different sectors for 2018 and 2019. Some of the large increases in online sales came in household goods, electrical and furniture alongside food and beverage. Research undertaken in 2021 indicates that Irish online retail sales grew by 159% in 2020 during COVID11. While there will have been a significant rebound in the post COVID period, the up-to-date d is not yet available.



**Table 23: Growth in Online Retail**

Source: CRBE

<sup>11</sup> On The Money: The Irish E-commerce Report 2021 (Wolfgang Digital)

## 6.6.2 Investment Activity and Yields

Almost €200m was invested in the sector in the first half of 2023, including almost €130m in Q2. The bulk of this spend, €115m, was on retail warehouses and retail parks.

Ireland's investment yield pattern predictions for 2023 can be summarised in the table below.

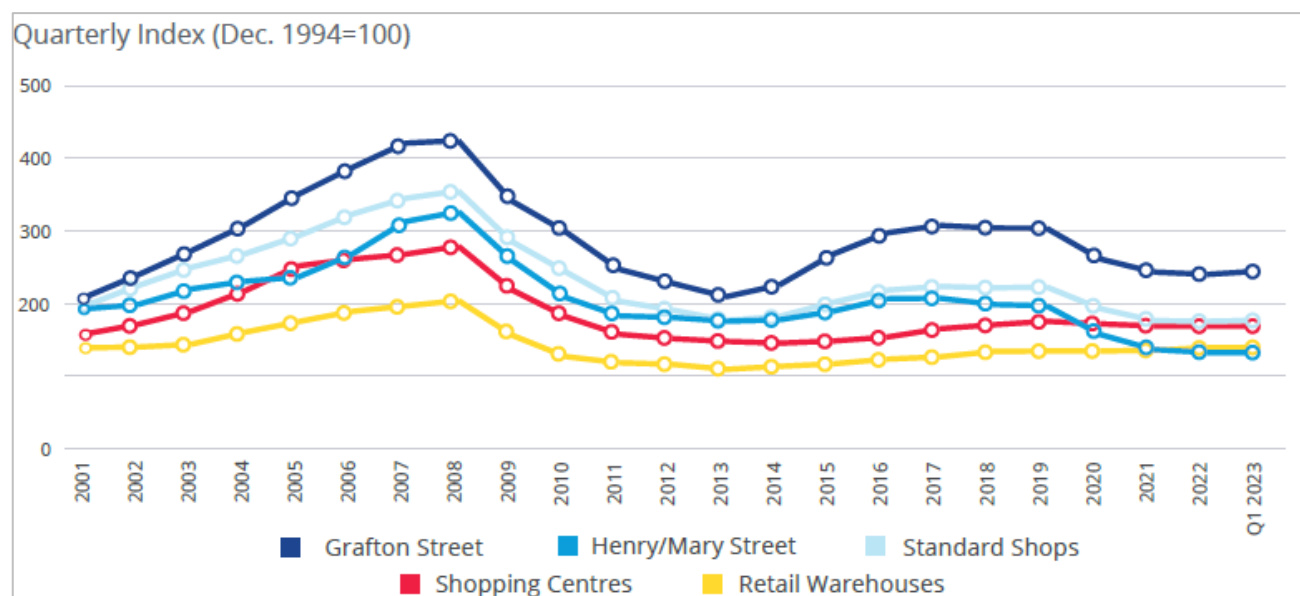
**Table 24: Yield Patterns**

Retail Grouping	Equivalent Yield	12 Month Change	Trend
<b>Prime High Street</b>	4.75%	+25bps	Weaker
<b>Prime Retail Warehousing</b>	6.25%	+50 bps	Weaker
<b>Prime Shopping Centre (Blend of M50 Centres)</b>	7.25%	+75 bps	Weaker
<b>Prime Supermarkets</b>	5.5%	+25 bps	Stable

Source: CBRE

## 6.6.3 Rents

As viability is of key importance, estimations of Secondary retail rents in January 2023 would be as follows:



**Table 25: Retail Rental Values 2001 to Q1 2023**

Source: Colliers

## 6.6.4 Vacancy Levels and Development

Overall retail vacancy rates were close to 7% at the end of Q3 2023, down from over 10% in Q3 2022. However, declining vacancy levels associated with post COVID-19 recovery has not triggered new development. Dublin City and its suburbs has seen little investment in new retail floorspace. Approved large scale developments in the city centre and in suburban centres were in many instances not built and these permissions have now expired. In the city centre, new retail development has generally formed part of refurbishment / mixed use schemes such as the redevelopment of the former Clery's Department Store on O'Connell Street; the repurposing of the Former Central Bank building and the redevelopment of Hibernian House. In the suburbs, new retail development has been almost exclusively convenience based.

### 4.3 Key Drivers

This section provides planning authorities information of what are the key drivers influencing the approaches to the zoning of employment and enterprise lands having regard to emerging sectors, declining sectors, future employment trends, employment typology space requirements and key considerations such as technology advancements, changing nature of work.

**Table 26: Key International National Trends**

<b>Trend</b>	<b>Description</b>
Artificial Intelligence	The World Economic Forum (2022) published a report on the Future of Jobs states that AI is likely to replace 85 million jobs globally by 2025. The impact on the geographies of economic land use are not yet clear, but it will become increasingly important factor.
Automation and technology advancements	Industries associated with manufacturing and transport, warehousing and distribution are at the forefront of automation and technology advancements. This is forecast to cause a reduction in overall employment generated but will not necessarily translate into a reduction in the amount of floorspace or land required.
Climate and Green economy	Climate change, sustainable development and the green economy are central policy concerns for global institutions and agencies including the UN, World Economic Forum, World Bank and EU. Considerations of 'Net Zero', energy consumption and dependence on fossil fuels, have implications for real estate investment, economic development and employment locations.
Changing Nature of Work and Remote Working	The increase in home-working following COVID-19 has brought remote working to the forefront of working life. Though its adoption was already increasing, the pandemic greatly accelerated this trend making remote work a central part of the workplace today and into the future (DETE, 2021). The growth in remote working brings a new dynamic to locational decisions. 88% of respondents to the 'Our Lives Online' CSO Pulse Survey would like to continue to remote work (CSO, 2021)
Clustering	Create, maintain, or upgrade economic strongholds in a favourable business ecosystem; proactively linking uses and activities in policy both in geographical locations, technologies and economic anchors (World Economic Forum, 2020)
Displacement of Employment and Enterprise Lands	Mixed-use regeneration of urban areas has significant benefits for urban economies and supporting vibrant, liveable towns and cities. While this has often affected defunct industries, there are also potential negative effects from the displacement of local industries/ businesses.

Economic Ecosystems	OCED (2019) recognises the need for economic policy to support the provision of a highly interconnected “ecosystem” of entrepreneurs and investors, technologists and innovators.
Evolution of Retail	The COVID-19 pandemic has significantly disrupted the physical retailing paradigm globally and nationally. It has dramatically increased the adoption and use of online platforms, with many retailers moving towards a more digitalised business model.
e-commerce	The rise of e-commerce has seen significant growth in the demand for freight and logistics industrial space in close proximity to customers (World Economic Forum, 2020).
Placemaking	Vibrant and attractive places can be created where businesses will want to be located and where people will want to work. By creating attractive urban environments, and providing supporting amenities and services, companies and employees are more likely to remain. Employees now expect not only a place to work, but a place that has modern amenities, ease of transport and access which positively influences their work experience (IPUT,2020) The role of placemaking in helping to enhance Ireland’s attractiveness to investors has been highlighted by research carried out by the IDA Ireland and the Department of Housing, Planning and Local Government. The creation of urban environments that offer good quality of life is important in allowing investors to attract and retain valuable workforces.
Smart Specialisation	Smart specialisation is part of the EU’s cohesion policy and the Europe 2020 Strategy that focuses on each region’s strengths and the activities that support these strengths (European Commission, 2020). As a place-based approach, it is characterised by the identification of strategic areas for intervention based both on the analysis of the strengths and potential of the economy and on an Entrepreneurial Discovery Process with wide stakeholder involvement. IDA, EI, LEOs, SFI and all enterprise agencies as well as Regional Enterprise Plans and Local Economic and Community Plans, ensure industry, education institutions and communities play a key role in this entrepreneurial discovery process.
Industrial and Logistics Floorspace	At national and local levels, there remains a strong demand for industrial and logistics floorspace (CBRE, 2022). Online retail and enterprise, not only has implications for town centre uses (particularly retail), but it also drives a demand for decentralisation distribution hubs for these goods and services.



Sustainability	<p>Achieving sustainable development means that the planning system has three overarching objectives of social, environmental and economic which are interdependent and need to be pursued in mutually supportive ways.</p> <p>Environmental, Social and Governance (ESG) is now a particularly relevant issue driving corporate investment and decision making.</p>
Proximity to key transport routes and strategic infrastructure	<p>The proximity of employment precincts to key transport routes is a key priority for industry, distribution and logistics sectors. Transport costs typically comprising a large share of an industrial businesses' operational cost base, compared to its rental cost. An industrial business makes costs savings by locating themselves nearer to key infrastructure. Employees should have access to Active Travel and sustainable mobility options.</p>
15-minute City	<p>The '15 minute City' concept envisages that within 15 minutes on foot or bike from where they live, people should have the ability to access most of their daily needs across six functions, living, working, supplying, caring, learning and enjoying all supported by diverse housing options and access to: safe cycle routes and local public transport, local health facilities, parks, shops, and other local infrastructure.</p>
National Space Strategy for Enterprise	<p>The scope of Irish involvement in space-related activities has increased substantially, with close to 100 Irish companies and a growing number of research teams actively involved in space-related developments supported by ESA, through Enterprise Ireland. Ireland's National Space Strategy for Enterprise, published in 2019, outlines the Government's vision for Ireland to develop '<i>An economically sustainable and expanding space-active industry, delivering quality jobs for the economy of tomorrow</i>'.</p>

### 6.6.5 Commercial Trends

In consideration of potential market demand for HIE in Cherrywood it is important to consider macro economic factors that affect investment decisions and ultimately drive floor space take-up. The table below seeks to illustrate how global trends are reflected in implications for Real Estate and land use planning decisions.

Figure 21 illustrates the key findings of research from Knightfrank (Cresa 2023 (Y)OUR SPACE) on key drivers for investment decisions.

**Table 27 Factors of Change - Implications for Real Estate and planning**

Change Factor	Drivers	Real estate Implications
<b>Economy</b>	<ul style="list-style-type: none"> <li>• Knowledge economy</li> <li>• Growth of SMEs</li> <li>• Switch to TMT Growth</li> <li>• Artificial Intelligence</li> </ul>	<ul style="list-style-type: none"> <li>• Short-term planning horizons; managing uncertainty</li> <li>• Outsourcing and contingent workforce</li> <li>• Disruptive forces</li> <li>• Less deep space; variety of floorspace; turnkey solutions</li> </ul>
<b>Business</b>	<ul style="list-style-type: none"> <li>• Leaner and flatter</li> <li>• Cost Competitive</li> <li>• Productivity and output</li> <li>• Access to labour</li> </ul>	<ul style="list-style-type: none"> <li>• Smaller footprints; flexibility and responsiveness</li> <li>• Flexible space/ contracts; core and flex space; commodity space</li> <li>• Effective workplace; palette of work setting; space as a brand</li> <li>• Locational priorities</li> </ul>
<b>Technology</b>	<ul style="list-style-type: none"> <li>• Artificial Intelligence &amp; IoT</li> <li>• Cloud-based technology</li> <li>• Ubiquitous connectivity</li> <li>• Smart building technology</li> </ul>	<ul style="list-style-type: none"> <li>• Agile working; connectivity; permeability</li> <li>• Automated processes responsive environments</li> <li>• Big data in space management</li> <li>• Integrated, smart BMS; demand management</li> </ul>
<b>Social</b>	<ul style="list-style-type: none"> <li>• Health and Wellbeing</li> <li>• Work-life balance</li> <li>• Choice and Experience</li> <li>• Interaction and learning</li> </ul>	<ul style="list-style-type: none"> <li>• Attraction and retention; improving productivity</li> <li>• Workplace experience</li> <li>• Diversity and multi-generational workforce</li> <li>• Importance of communities and public realm</li> </ul>
<b>Environmental</b>	<ul style="list-style-type: none"> <li>• Social/ ethical responsibility</li> <li>• Corporate responsibility</li> <li>• Green buildings</li> <li>• Climate emergency</li> </ul>	<ul style="list-style-type: none"> <li>• Environment, social and governance criteria</li> <li>• Sustainable development goals</li> <li>• Corporate social responsibility</li> <li>• Carbon neutrality</li> </ul>
<b>Legacies of pandemic</b>	<ul style="list-style-type: none"> <li>• Business transformation</li> <li>• Restructuring of corporate real estate portfolios</li> <li>• 'Flight to quality' for workspaces</li> <li>• Workstyles becoming more complex and office-centric</li> <li>• Corporate Brand and image</li> <li>• Employee Well-being</li> <li>• Increased collaboration</li> <li>• Cost management and mitigation</li> </ul>	<ul style="list-style-type: none"> <li>• The <b>de-densification</b> of office space and gradual return</li> <li>• Greater allocation of total floor space to <b>amenity and collaborative settings</b></li> <li>• Office solution that will aid retention and recruitment and increase productivity will deliver financial performance &amp; workplace mobilised to appeal to talent</li> <li>• corporate real estate portfolios will display a <b>mix of core and flex space</b>, the relocation of core facilities to avert obsolescence and save costs</li> <li>• newly built and refurbished office space that meets <b>best-in-class amenities, energy efficiency, &amp; ESG-certified standards</b>.</li> <li>• 56% of global corporates to embrace 'hybrid' in next 3 years, 23% expect to maintain an office-first approach.</li> </ul>

Source: Commercial Real Estate: Planning for Change (Ramidus Consulting, 2018)

Knightfrank: Commercial real estate in 2023 and the outlook for 2024, Knightfrank: Cresa: (Y)OUR SPACE research

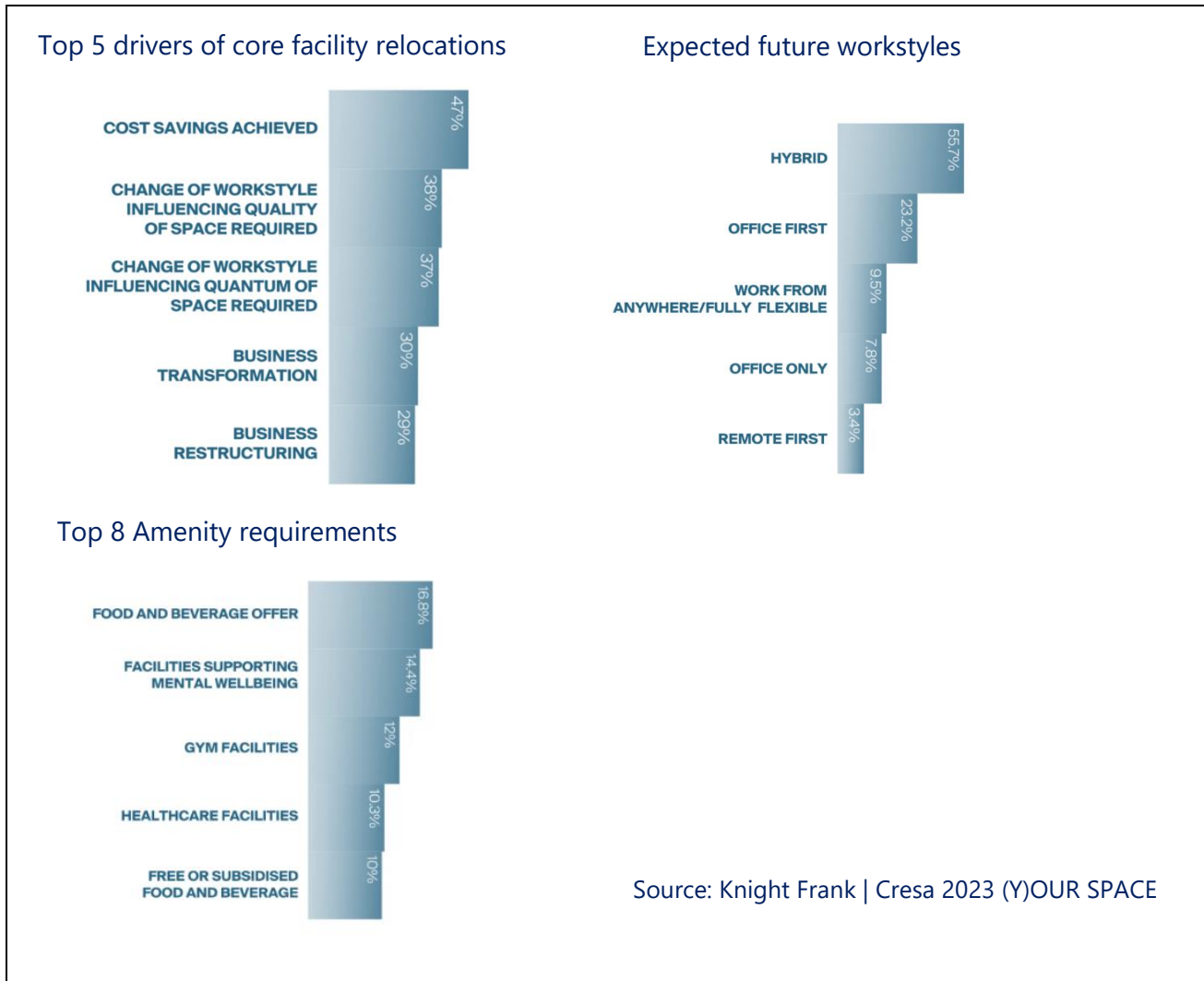


Figure 21 Key drivers for commercial investment

### 6.6.6 Land use needs of employment typologies

Differing typologies of commercial /industrial land-uses will generate different employment characteristics (e.g. high-intensity commercial office use in comparison to lower intensity warehousing/logistics). These should be considered in the overall strategic assessment of employment lands. Understanding the land use needs in terms of employment sectors, helps to identify potential growth sectors, employment densities, indicative space requirements and site typologies.

## 6.7 Economic and Investment Outlook

At the national level the economy has rebounded strongly after COVID and unemployment is at near record low levels. The surge in inflation resulting from the war in the Ukraine peaked earlier in the year and has since declined to levels sought by monetary policy. However, interest rates have climbed to counteract these inflationary pressures, and this has had a significant impact upon the investment in the property sector, with investors now attracted to other asset classes by these higher interest rates.

Prospects for the Irish economy over the medium to long term appear good. These prospects will be impacted by the full range of macro-economic and policy factors which may play out over the period of the Plan. Importantly, these factors will underpin the capacity of the City and the SDZ area to attract both investment and the appropriate skill sets required for the economy going forward.

The development of the SDZ area will need to establish a realistic and robust planning horizon, which could be 15-20 years. It must be flexible enough to cater for different development cycles and changes in demands and requirements.

## 4.4 Forecasting Methods

Section 4.4 of the NPF recognises that regional and local policy needs to be agile in adapting to significant opportunities in the short term, but that housing and infrastructure provision must follow and be reflected in planning policy at the earliest opportunity.

Where the forecast labour demand falls short of the area's supply capacity, the standard economic forecast delivers less than full employment. In other words, the forecasts show higher unemployment rates, and lower economic activity rates, than is considered normal and desirable.

This generally applies to places which are already economically challenged and short of jobs. In such places, it may be advisable for a development plan to provide employment land over and above the economic forecasts, hoping to attract employer demand over and above the forecasts, so the local economy moves towards full employment. Labour demand forecasts are more therefore useful in areas where there is not full employment. This is clearly not the case in Cherrywood and Dun Laoghaire at present.

For employment areas within the county, ultimate land supply must also be consistent with overall DLR requirements. The challenge is to apply county-wide patterns of supply to a local level.

A complementary labour demand approach is outlined in b) which utilises many of the same data sources. The method selected should have regard to the particular circumstances of the planning authority.

- a) **Demographic and labour supply** approach, is reflective of higher level NPF and RSES population parameters. This may be considered a top-down policy led approach and is the one adopted in [Appendix A](#) of the Guidelines. Such a method will take into account projected population growth and jobs: resident work force ratio<sup>12</sup>. This approach assumes that housing will be delivered in line with the housing targets prepared under the [Guidance on the Preparation of a Housing Need and Demand](#)

<sup>12</sup> A ratio of 1.0 means that there is one job for every resident worker in a settlement. However, a settlement or county will have different commuter patterns, with major employment centres with net-inflows having a ratio of greater than 1.0 and commuter settlements with net-outflows having less than 1.0.

[Assessment](#) and associated data sources and toolkit. It assumes that there will be enough jobs over the plan period to fully utilise the capacity of the local labour market and unemployment can be as low as reasonably expected. The NTA's [National Demand and Forecasting Model](#) includes data at a regional and local level on the allocation of jobs across zones and which are based on NPF targets. Assumptions have to be made in relation to the distribution of jobs across sectors and then translated into land use zoning requirements using employment density and plot ratio assumptions<sup>13</sup>.

*Data requirements* include CSO information on population, resident employment/participation rates, places of employment (POWSCAR) and housing/population targets.

**b) The labour demand** approach is bottom-up and uses regional and local economic forecasting methods. The approach allows for a consideration of uneven distribution of economic activity, agglomeration and concentration, migration, population and unemployment rates. An example of this is [Prospects for Irish Regions and Counties – Scenarios and Implications](#) (ESRI, 2018). Different scenarios can be reviewed (e.g., current trends or growth scenario).

However, the above example only disaggregates future jobs growth on a regional basis, and for traded, non-traded and government services. It does not disaggregate future jobs growth that aligns with the relevant land use categories (Business Park / Industrial Estate; Special Industry; Warehousing & Distribution; High Technology/ Manufacturing Campus Development; and Commercial Office Employment). Projecting the industry of employment over a regional or county area will provide a robust basis for assessing the demand for employment lands.

*Data requirements* include CSO information on population, resident employment/participation rates, places of employment and industry of employment (POWSCAR), housing/population targets, labour force survey and econometric modelling.

The above approaches (a) and (b) may be used to validate the other. It is important to note that the format and exact methodology is not prescriptive and will need to be adapted to reflect the circumstances and resources of the local authority.

Forecasting approaches should be supplemented by a market analysis of recent past take-up rates, vacancies, emerging sector requirements

These further steps allow for local areas to avail of specific identified investment opportunities, identify how much employment and enterprise growth will be accommodated on zoned land, and how the expansion of existing enterprises on un-zoned land can be catered for. This assessment feeds into an overall employment demand (Step 12) Forecasting employment land requirements (Step 13) involves translating employment demands and forecasts into land requirements using:

- A classification of employment and property types for land use zoning categories;
- Employment density assumptions
- Floorspace to site area assumptions.

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<sup>13</sup> It should be noted that techniques a and b require conversion of future jobs into land use requirements using employment density and plot ratio assumptions.

## Employment Density

In 2010, Yorkshire Forward commissioned a report by Roger Tym & Partners to analyse how should authorities translate future employment change into future employment land requirements. The following default assumptions were recommended in relation to floorspace per head:

- Offices – 16 sqm (net internal area) per worker
- Industrial and warehouse – 67 sqm (gross internal area) per worker

It is noted that the recommended floorspace ratios should be used as a starting point when allocating provision for offices, factories and warehouses and planners will need to adjust the default densities in light of local information. Additionally, if employment space is being lost this will need to be factored into the number of jobs that may be lost, which impacts the default density assumptions.

**Table 28 Employment Density Ratios<sup>14</sup>**

Employment & Enterprise Zoning	Density sqm Matrix
Business Park / Industrial Estate	35-50
Warehousing & Distribution	70-90
High Technology/ Manufacturing Campus Development	40-60
<b>Commercial Office Employment</b>	<b>15-20</b>

It is notable that the 20 sq.m. employment density calculation was integrated into the definition of HIE in the Planning Scheme to clarify the meaning of 'High Intensity Floorspace'. However, the table above illustrates that this may be more appropriately defined as Commercial Office Employment.

### ***Floorspace to site area assumptions - Options for Plot Ratio***

Following a review of literature and practice of employment land studies a plot ratio of 40% is generally allocated to identify the overall land requirement for employment purposes. It is accepted that individual sites may be developed at a higher and lower plot ratio, depending on the characteristics of the site, and the requirements of the end user, but it is appropriate to use a standard when assessing the overall land requirement.

For office development in particular, plot ratios vary significantly depending on the nature and intensity of development. The employment land review guidance 2004 recognises that there is a clear difference between plot ratios expected at business parks, with car parking and landscaping, and town centre office space containing more and higher storeys occupying the majority of a plot and with significantly higher plot utilisations possible. This has a significant implication on the land requirement. Research referenced in previous ODPM employment land review guidance showed business park plot ratios of 0.25 to 0.4 and town centres with 0.75 to 2.

<sup>14</sup> The matrix draws from the Employment Density Guide (3<sup>rd</sup> Edition, Homes and Community Agency, UK).



For most industrial and warehousing development, ratios of 0.4 – 0.5 are well used for employment land reviews, with research referenced in the ODPM guidance showing 0.35 - 0.45 and 0.4 - 0.6 respectively. An example of the plot ratios recommended:

<b>Box D.7: Plot Ratios for Employment Use (Gross Floorspace to Site Area)</b>		
	<b>Roger Tym, 1997</b>	<b>Other Studies</b>
Business Park	0.25 to 0.30	0.25 to 0.40
Industrial	0.42	0.35 to 0.45
Warehouse	–	0.40 to 0.60
Town Centre Office	0.41	0.75 to 2.00

**Source: Roger Tym & Partners, 1997 and ERM Review**

Draft Urban design analysis undertaken by Loci as part of the Planning Scheme review has modelled a floor space range based on Plot ratio, ranging from 2.7 to 3.0 in TC1 (site area 43,880 sq.m.) and from 2.5 to 2.8 in TC3 (Site area 53,880 sq.m.).

### **Jobs Ratio**

Research in section 4.3 highlighted that Census 2022 states the labour force in Dun Laoghaire Rathdown figure is now 106,500 people from a population of 233,457 (approx. half of population). The labour force participation rate was 59% in 2022.

The Planning Scheme currently provides for a population of 26,000 people in Cherrywood. To achieve a sustainable jobs to resident workforce ratio of 1.0, it is reasonable to expect the employment in Cherrywood would be of the order of 13,000 (all jobs). POWCAR data identified in Figure 19 indicates that there were a total of 2,575 persons working there in 2016.

It is important to note that the jobs ratio for Cherrywood is not reliant on HIE or office employment. Retail and Services floorspace, also has potential to yield significant workforce in the area (approx.. 1 job 15sq.m -20sq.m.)

### **HIE Floorspace Quantum's**

As a general benchmark and based on a typical office floorspace density of 1 employee per 20 sq.m. an overall employee target of 10,000 could be accommodated with 200,000 sq.m. Table 2.2 of the Planning Scheme provides for a minimum quantum of 267,550 up to 350,000 sq.m. Table 2.2 indicates current capacity for 254,000 sq.m.

Table 2.5 of the planning scheme illustrates that approx.. 89,000 sq.m. has been delivered in HIE1 and HIE2 with potential for approx..150,000 sq.m. in zones HIE1 to HIE6. Table 2.6 indicates capacity for 109,000 sq.m. in the town centre.

## 6.8 SWOT Analysis

This section considers the potential for future development in the HIE ZONING having specific regard to economic and viability issues, including those raised at Stakeholder discussions.

**Table 29: SWOT Analysis**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Good strategic location for mixed use area</li> <li>• Future development can provide or a range of different uses in a flexible manner.</li> <li>• Strong Luas, public transport and national road access.</li> <li>• Proposed Luas extension</li> <li>• Land ownership is controlled by relatively few parties</li> <li>• Can accommodate and respond to significant market demands.</li> <li>• Anchor Employers established in Cherrywood (Dell-EMC, Eir-EVO, Aviva, Accenture, APC/Matter Private)</li> </ul>	<ul style="list-style-type: none"> <li>• Slow take-up of HIE by Market</li> <li>• Unviable high spec urban commercial space</li> <li>• Low commercial property prices</li> <li>• Competition with other development areas of a similar type over the course of the plan implementation</li> <li>• Key sites have permission (ie. One Cherrywood) but market is not delivering</li> <li>• Zoning of HIE surrounding town centre (HIE 3-6) may lead to segregated and unattractive urban area</li> <li>• Severance between town centre quarters</li> <li>• Slow delivery of retail and cultural offer</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Potential to attract skills and investment</li> <li>• Clustering of specialisms</li> <li>• Urban workspaces, enterprise headquarters</li> <li>• Co location of different suitable uses</li> <li>• Vibrant urban environment</li> <li>• Mix of uses, services and amenities</li> <li>• Social and community infrastructure</li> <li>• Local new population (workforce)</li> <li>• Smart technologies to assist in mixed use development</li> <li>• Access to Dublin Labour Market (including Wicklow and Wexford)</li> </ul>	<ul style="list-style-type: none"> <li>• Construction costs &amp; inflation</li> <li>• Failure of adequate quantum of compatible commercial floor space demands to materialise</li> <li>• Economic downturn</li> <li>• Competition from other mixed use centres</li> <li>• Deglobalisation</li> <li>• Development, funding and planning delays</li> <li>• Failure to secure funding for non-market projects</li> </ul>

## 7. RECOMMENDATIONS FOR PLANNING SCHEME REVIEW

### 7.1 Introduction

This section outlines a framework for recommendations for the SDZ Planning Scheme in respect of 3 aspects of the HIE Zoning; namely (1) Quantum of Floor Space (2) Distribution of Floor Space; and (3) HIE definition/land use matrix.

### 7.2 Themes

The following potential themes are identified that may feed into the formulation of further policy for the Cherrywood Town Centre & Environs area:

#### Enabling development and investment

- The clear purpose of the HIE review is to identify policy and regulatory measures that will encourage investment in the SDZ as an economic hub and a vibrant mixed use centre.
- The HIE review is to support the creation of an urban environment that supports HIE investment (design, services, mobility, public realm etc);
- There has been significant investment in Infrastructure, amenities and residential developments to support this next stage of economic investment;
- Cherrywood has an established business park, enterprise networks and economic base which are building blocks for future employment.

#### Regional Designation and Status as an employment hub

- Cherrywood is a Strategic Employment centre for Dun Laoghaire-Rathdown and a fundamental component of the SDZ Planning Scheme;
- Cherrywood is Identified in MASP and RSES as an employment location for the region.
- It is MASP policy to promote Cherrywood as a Mixed-use district with high intensity employment.
- Cherrywood and Docklands are the only SDZ's designated with an economic/employment objective.
- Cherrywood presents an important landbank of employment land for the County of Dun Laoghaire-Rathdown. The Development Plan considers that employment land bank is conservative relative to other areas in Dublin.

#### Labour Force Characteristics

- Labour Force and population characteristics have a significant impact on the development potential of the area.
- The labour market is at full employment, but conversely there is low demand for workspace. Perhaps counterintuitively, it entails severe constraints on labour supply with limited flexibility. Broadly speaking, this means are insufficient workers to occupy the floorspace (particularly high intensity employment use).
- Constraints on housing market and affordability, greatly restrict potential for commercial growth.
- The labour force is restricted a local level. Dún Laoghaire-Rathdown has a relatively low participation rate (59% in 2022). DLR residents work in just over half the jobs in the county (approx. 53%). The largest employment destination outside of the County was Dublin City where a total of 34,291 DLR residents travelled to work (2016). DLR recorded the lowest unemployment rate in the State at 6%, and the joint

lowest long-term unemployment rate at 3%. DLR has a comparatively positive and sustainable 'Jobs Ratio' of 0.9. (labour force to jobs in county).

- The existing workforce in the county is not flexible and Cherrywood is dependent on mobility and accessibility from outside the county.

### Market Characteristics

- The (HIE) office market is not fully functional, nationally or regionally. Investment in high-grade office floorspace is generally restricted to Dublin City Centre and Docklands.
- Rental yields in the suburban market are approximately half that of the city centre. Rents in Q3 of 2023 in the city centre were average €700/sqm, €318/sqm in the south suburbs, €221/sqm in the northern suburbs, and €194/sqm in the western suburbs.
- Together with high construction costs this renders any speculative office development outside the city core unfeasible in the short term.
- Investment outside the core area is generally associated with long-term institutional commitment to a locality, such as Microsoft in Sandyford or Zurich in Blackrock. It is notable Cherrywood Business Park also benefits from long-term anchors (Dell-EMC, Eir-EVO, Aviva, Accenture, APC).
- While market sentiment is cool towards suburban office development at present, it is notable that land owners and developers were strongly supportive of the HIE zoning quantum and concept when An Bord Pleanála initially adopted the Planning Scheme. In the medium to long-term characteristics of the property and labour market may change, but there are currently no indications this will entail a return to intensive office usage.
- Competing centres in 'Information and Communication, Financial' (CSO Workplace Zones) are– i.e. Docklands, Sandyford, Citywest, Airport (not typical city-edge/industrial estate (Wholesale/Retail Trade) (manufacturing focus at Grange Castle etc). Cherrywood does not currently have an educational / research synergy (3rd Level Campus).
- Notably, Docklands is reaching a point of near-completion, which potentially will open a path for Cherrywood to absorb regional demand. Cherrywood may be considered as an attractive next-step location in future.

### Need for Identity and Vision

- While identified as a strategic employment location, Cherrywood does not have an identifiable role or network with education, research, health or enterprise clusters etc. The planning scheme is more of a 'development management' document.
- The primary developers and landowners focus their concept for the area as a sustainable community to live in, rather than a commercial district centre or employment destination. Strategic purpose of the area is therefore diluted.
- The revised Planning Scheme could complement a big vision or concept for HIE zones;

### Accessibility and Mobility

- Mobility and affordability are vital components of attracting and increasing the workforce. Cherrywood does not have comparable Public transport access to Dublin city centre.
- The planning scheme transport strategy does not advocate Transport Interchange or Park and Ride rather support Local Parking' which serves a particular user/use. Arrival into the town centre by Luas is a tremendous asset. However, the road network does cause severance, which detracts from community, culture, retail and commercial experiences. Improvements in this town centre environment in time will encourage investment in due course.

## 7.3 Recommendations:

The following recommendations relate to MDB's review of HIE in the current Cherrywood Planning Scheme to providing advice on potential changes in land use mix and quanta incorporated in the Council's urban design analysis and masterplan proposals.

### 7.3.1 Definition of HIE

HIE Objective	
1	<p>Where it is considered to amend the wording of the HIE Objective to reflect commercial trends in period since planning scheme adoption:</p> <p><del>High Intensity Employment types usually have an employee to floor area ratio of c. 1 per 20sq.m. and usually generate peak hour trips.</del> High Intensity Commercial Office Employment types include but are not confined to:</p> <ul style="list-style-type: none"> <li>• Research Office Employment</li> <li>• Service Office Employment</li> <li>• Science and Technology Business; and</li> <li>• Mixed-use urban district offices</li> </ul>
2	<ul style="list-style-type: none"> <li>• Omit reference to "employee to floor area ratio of c. 1 per 20sq.m. and usually generate peak hour trips"</li> <li>• Reference to 'High Intensity Office' is considered unnecessary and add 'Commercial Office Employment' may be more suitable</li> <li>• Include reference to "Mixed-use urban district offices"</li> </ul>
3	<ul style="list-style-type: none"> <li>• HIE is a mono-use zoning for commercial development only. It is not necessarily appropriate to an urban centre.</li> <li>• Reformulate HIE as a "use" within the Urban Centre rather than a zoning to allow greater flexibility on a block by block basis and vertical mix of uses within buildings and blocks.</li> <li>• HIE could be defined as a "commercial office employment" use</li> </ul>
4	<p>It is recommended that the Planning Scheme adopts a zoning classification based on Appendix B of The Development Plan – Guidelines for Planning Authorities (2022) as follows:</p>

	<ul style="list-style-type: none"> <li>• DC- District Centre is applied generally to Town Centre which allows for broad mix of uses including residential, retail, commercial and services.</li> <li>• DC District Centre would be appropriate for (part of) HIE 4 and HIE 5 to accommodate a spillover from town centre and a more urban Cherrywood Avenue</li> <li>• BP - Business Park/ Industrial Estate – lower intensity commercial zoning may be appropriate to western edge of HIE 4 and HIE 5</li> <li>• CI (or SNI) – is applied to a Community/civic centre/hub in TC1 or TC3. Under the Dun Laoghaire Rathdown County Council Development Plan 2022-28 utilises an SNI zoning which is suitable for this purpose</li> <li>• COE - Commercial Office Employment is applied to HIE 1 and HIE 2 (existing Cherrywood Business Park)</li> </ul> <p>Retail and residential distribution to be controlled by Urban Design master plan, design code parameters, street cross-sections and quantum figures.</p>
5	<p>The Planning Scheme’s Zoning Matrix – allows for a wide range of uses and business and is not considered restrictive. However, update to support uses that weren’t in original planning scheme:</p> <ul style="list-style-type: none"> <li>• Co-working space</li> <li>• Events / exhibition / conference centre</li> <li>• Studios and media</li> <li>• Others</li> </ul>
6	<p>Consider allowing greater mix of zoning for peripheral HIE 3, 4 and 5 which allows for lower intensity and mix of uses that complement the primary function of the town centre area.</p> <p>It is noted that a broader range/mix of zoning may not be appropriate in the HIE designated areas within the three Village Centres.</p>

### 7.3.2 Quantum of HIE Floorspace

HIE Quantum	
1	The maximum Quantum of HIE under Table 2.2. of the planning scheme at 350,000 (current capacity for 254,000 sq.m.) providing for some 17,500 employees overall is likely to overly optimistic.
2	The Minimum Quantum of 267,550 suggest potential employees of 13,350 which is high in the short term and should be reduced to 150,000 sq.m. to allow a greater mix of uses
3	The Minimum floorspace of 82,800 sq.m. (109,000 maximum) in the town centre is optimistic in the short to medium term. It is recommended the Minimum HIE floorspace (or office employment floor space) is reduced to approx.. 30,000 sq.m. to allow for greater mix of uses in the town centre. The maximum should level should be similarly be reduced to approx.. 50,000 sq.m.



4	In order to support development to Grand Parade require minimum of 2 to 4 storeys HIE (or Commercial office employment floor space) facing onto Grand Parade commercial with allowance for residential or hotel/aparthotel above.
5	Allow commercial use to be applied/transferred to basement level (lower ground) appropriate to large spaces conferencing, education, halls, venues.

### 7.3.3 Spatial Distribution of HIE floorspace

HIE Landuse distribution and zoning	
1	Support Mixed use centre overall with HIE use (or Commercial office employment use) within overarching mixed use zoning
2	Achieve percentages of HIE (or Commercial office employment floorspace) within development blocks (according to location) i.e. 20% to 25% HIE (or office employment floor space) facing within TC3 blocks.
3	Adopt an approach similar to Dublin Docklands for allocation of commercial and residential floor space on the basis of ratio, for example: <ul style="list-style-type: none"> <li>(a) Allocate the total land area between residential/commercial and community as per the use mix ratio set out in the Urban Centre Block Objective (50:50 etc.) with a flexibility to provide a ratio of 30:70 in the commercial hubs, counterbalanced by a ratio of up to 70:30 in the more residential neighbourhoods.</li> <li>(b) Subtract the already developed residential/commercial land area, from the total land area to give the land area available for residential/ commercial purposes.</li> <li>(c) Calculate the use mix ratio needed on the remaining available land area to achieve the specified use mix ratio for the Urban Centre Block, taking account of any existing residential and commercial development</li> </ul>
4	Do not require designation of sites for specific uses but control development with physical parameters of urban design code
5	Allow HIE (or Commercial office employment floorspace) to be achieved by vertical mix as well as horizontal – where main streets must provide HIE uses at ground level.
6	Do not allow dilution of HIE use to support warehousing, retail warehousing or distribution
7	Reconsider Mono-use zoning on edge of Town Centre at HIE3, HIE4 & HIE 5 to support greater integration with urban design network for town centre to potential for support dynamic mixed use urban environment. Cherrywood Avenue may support mixed-use development on both sides of the road.
8	While HIE 1 and HIE2 are largely built out, the areas should not be excluded from providing a greater mix of uses to potential for support dynamic mixed use urban environment

## 7.4 Planning Scheme Outcomes

This section provides commentary on how the above recommendations have incorporated or interpreted in the proposals for amendments to the Cherrywood Town Centre and Environs, Final Land Use Mix (26 July 2024).

### 7.4.1 Definition of HIE

HIE Objective	
1	The wording of the HIE Objective has been extensively reviewed as part of the revised landuse categorisation and land use mix. The HIE definition does not refer to employment density (1 per 20 sq.m.) as an objective and supports mixed use commercial uses. A separate Urban Form Framework (UFDf) is no longer proposed providing greater clarity and simplifying the HIE framework.
2	The Town Centre (TC) zoned plots are proposed to be called TCC plots (Town Centre Core), while the HIE zoned plots are to be called the TCE plots (Town Centre Environs). The TCC and TCE plots collectively make up the Cherrywood Town Centre (which has a District Centre designation).
4	TCC HIE (UrbComm) would be predominantly in the TCC superblocks but would also be on the TCE (HIE zoned) plots at the active edges.
5	For the Planning Scheme's Zoning Matrix, both the TCC and TCE plots will be mixed use. Uses under the HIE TCC and HIE TCE Land Use will be broadened out. For Appendix A - & for HIE Land Use (may be described further as UrbComm and Long Term Urban Strategic Employment) will be broadening the permissible associated uses even further.
	In terms of categorisation, the HIE Land use will now comprise two kinds of employment namely HIE TCC / Urbcomm (which is predominantly to be located on the TCC plots but will also be on the active edges of the TCE plots), AND HIE TCE (located on the TCE plots). This latter employment type is Strategic Long Term Urban Employment.
6	A broader mix of zoning for TCE (HIE zoned) plots are supported at the active edges (particularly Cherrywood Avenue West). The TCE area support a more urban form at the town centre edge while ensuring the scheme retains areas of lower intensity and mix of uses that complement the primary function of the town centre area.
<b>Comment:</b>	Overall, the proposed amendments to the planning scheme provide for a comprehensive review of the HIE objective with a more flexible objective that is more adaptable to the town centre evolution. It provides a new way of describing desired use mix in the town centre and environs. Urban Business Town Centre Commerce (UrbComm). Scale of business and typologies, with a potential emphasis on support for larger HIE, KIBS, creative, start-up etc. Greater vertical and horizontal use mixing within blocks. The HIE 'zoning' matrix is to be broadened.

## 7.4.2 Quantum of HIE Floorspace

HIE Quantum	
1	The proposed Final Land Use Mix (July 2024) incorporates recommendations to reduce HIE floorspace. The Urban Design approach encourages a high plot ratio and higher residential content based around an urban street layout and design code.
2	In the Town Core the Land Use mix provide for floor space proposed is of the order of 53,304 sq.m. HIE TCC with the majority of space envisaged for TCC4 c.58%. This is consistent with recommendations in this study.
3	The Town Centre Environs area (TCE 1-5_ retains significant capacity for HIE floorspace with up to 339,572 sq.m. HIE TCE and 39,760 sq.m. UrbComm available. These floor space estimates are based on a relatively high plot ratio scenario, but ensure that there is strategic long term capacity for employment generating lands.
4	The urban design code or planning scheme supports flexibility of use mix in built form (vertical mix) as well as scope of greater mix of use in TCC and TCE plots
5	Basement: The principle of having suitable uses at basement level is supported in the proposed amendments to the Planning Scheme. Potential uses include Retail, conferencing, leisure. Such uses would be Non-Residential rather than commercial per say, to support flexibility.
<b>Comment</b>	Overall the proposed amendment to Planning Scheme supports a reduction of HIE floorspace and a more diverse land use mix, particularly within the TCC. The strategic need to provide capacity for employment lands is supported in the HIE TCE area.

## 7.4.3 Spatial Distribution of HIE floorspace

HIE Landuse distribution and zoning	
1	<p>The proposed amendment to the planning scheme provides for the control of Retail and residential distribution by an Urban Design master plan, design code parameters, street cross-sections and quantum figures.</p> <p>The HIE/TCE plots have the potential to accommodate Long Term Strategic Urban Employment objectives for the planning scheme.</p>
<b>Comment:</b>	The proposed amendments to scheme support a more mixed use TCC area that is less reliant on HIE use. The mono-use approach of the former HIE zoning has been revised to support dynamic mixed use urban environment. The potential of Cherrywood Avenue West is also recognised a more urban transition (street) between TCC and TCE areas.

## APPENDIX A

Extract from Appendix B of The Development Plan – Guidelines for Planning Authorities (2022); Recommended Standardised Zoning Objectives.

Relevant definitions for employment activities are set out below. Cherrywood is designated a District Centre in the County Development Plan’s hierarchy.

UC	Urban Core	Provide for the development and enhancement of <u>urban core uses including retail, residential, commercial, civic and other uses</u>	Consolidate the existing fabric of the core/central areas of settlements by densification of appropriate commercial and residential developments ensuring a mix of commercial, recreational, civic, cultural, leisure, residential uses and urban streets, while delivering a quality urban environment. The zoning emphasises compact growth objectives and priority for public transport, pedestrians and cyclists while minimising the impact of private car based traffic
DC	<b>District Centre</b>	Provide for the development and enhancement of district centres in urban areas including for <u>retail, residential, commercial, civic and other uses</u>	Provide for the development of district level centres in cities and larger urban areas as part of an integrated strategy for mixed-use compact growth where key locations are identified for new development consolidation and densification.
COE	Commercial Office Employment	Provide for <u>office based development with a high density of employment</u>	Provide for office-based development where a <u>high density of employees</u> are to be accommodated based on the sustainability of <u>high quality public transport accessibility</u>
BP	Business Park/Industrial Estate	Provide opportunities for <u>general enterprise</u> and business development	Facilitate opportunities for compatible industry and general employment uses. General Employment areas should be highly accessible, well designed, permeable and legible with a <u>modest density</u> of employees. Policy safeguards are to be provided to prevent inappropriate intensive office uses at locations poorly served by public transport and the proliferation of retail or commercial uses requiring public access that are best located in mixed-use town core areas.
CI	Community Infrastructure	Provide for and protect <u>civic, religious, community, health care and social infrastructure</u>	Facilitating the sustainable development of necessary community, health, religious, social and civic infrastructure for communities <u>ranging from those of regional importance such as health facilities, to those of local and neighbourhood importance such as places of worship, community centres and childcare facilities.</u>

Use	Code	Zoning	Objective	Description	RGB Colour (Outline, Fill)
Residential	RS	Residential	Provide for residential development and protect and improve residential amenity	For existing predominately residential areas allowing for the protection of existing residential amenity balanced with new infill development	235-231-0, 255-255-115
	R1	New Residential	Provide for new residential development in tandem with the provision of the necessary social and physical infrastructure.	For new residential areas/town extensions to ensure the provision of high quality new residential environments. Provide an appropriate mix of house sizes, types and tenures in order to meet household needs and to promote balanced communities	255-255-115, 255-255-190
Urban/ Town	UC	Urban Core	Provide for the development and enhancement of urban core uses including retail, residential, commercial, civic and other uses	Consolidate the existing fabric of the core/central areas of settlements by densification of appropriate commercial and residential developments ensuring a mix of commercial, recreational, civic, cultural, leisure, residential uses and urban streets, while delivering a quality urban environment. The zoning emphasises compact growth objectives and priority for public transport, pedestrians and cyclists while minimising the impact of private car based traffic.	110-110-110, 178-178-178
	DC	District Centre	Provide for the development and enhancement of district centres in urban areas including for retail, residential, commercial, civic and other uses	Provide for the development of district level centres in cities and larger urban areas as part of an integrated strategy for mixed-use compact growth where key locations are identified for new development consolidation and densification.	110-110-110, 156-156-156
	RE	Regeneration	Provide for enterprise and/or residential led regeneration	Identification of specific areas of the built fabric for significant redevelopment and regeneration activity	156-156-156, 225-225-225
	RW	Retail Warehousing	Provide for retail warehousing development	Facilitate the sale of bulky goods/goods in bulk within high quality settings and highly accessible locations subject to the requirements of the relevant retail strategy and retail planning guidelines	215-194-158, 214-199-174

Use	Code	Zoning	Objective	Description	RGB Colour (Outline, Fill)
Community Services and Infrastructure	CI	Community Infrastructure	Provide for and protect civic, religious, community, health care and social infrastructure	Facilitating the sustainable development of necessary community, health, religious, social and civic infrastructure for communities ranging from those of regional importance such as health facilities, to those of local and neighbourhood importance such as places of worship, community centres and childcare facilities.	112-68-137, 170-102-205
	LC	Local Centre	Protect, provide for and/or improve local centre facilities	Provide a mix of local community and commercial facilities for the existing and developing communities to ensure a range of community, recreational and retail facilities, including medical facilities and childcare facilities, at an appropriate local scale.	215-194-158, 214-206-193
	ED	Education	Provide for educational facilities	Providing for the wide range of educational facilities and related development	169-0-230, 223-115-255
	OS	Open Space and Recreation	Preserve and provide for open space and recreational amenities	Provide recreational and amenity resources for the community including parks, sporting and leisure facilities, amenity areas and natural areas	163-255-115, 211-255-190
	TR	Tourism	Provide for tourism related facilities and amenities	For development where the main uses would be hotels, marinas or other types of uses which are directed mainly at servicing tourists/holiday makers	137-90-68, 215-176-158
	TU	Transport and Utilities infrastructure	Provide for transport and utilities infrastructure	For development associated with the provision of public transport services (including ports and airports) and public utilities such as electricity network infrastructure, telecommunications, gas, waste facilities, water, wastewater, etc.	110-110-110, 190-232-255





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