



SUBMISSION TO:

NATIONAL TRANSPORT AUTHORITY

IN ADVANCE OF THE PREPARATION OF THE

GREATER DUBLIN AREA TRANSPORT STRATEGY

2015-2035

MARCH 2015

CONTACT DETAILS

Conor O'Donovan

Director of Policy & Communications
Society of Chartered Surveyors Ireland
38 Merron Square
Dublin 2

T: +353 (0)1 644 5500

E: codonovan@scsi.ie

www.scsi.ie

Stephen M. Purcell

Director
Future Analytics Consulting
23 Fitzwilliam Square (South)
Dublin 2

T: +353 (0)1 639 4836

E: stephen.purcell@futureanalytics.ie

www.futureanalytics.ie

SUBMISSION TO:

NATIONAL TRANSPORT AUTHORITY

IN ADVANCE OF THE PREPARATION OF THE

GREATER DUBLIN AREA TRANSPORT STRATEGY 2015-2035

CONTENTS



INTRODUCTION

.....



STRATEGIC ISSUES
FOR THE GDA

.....



RESIDENTIAL PROPERTY

.....



COMMERCIAL PROPERTY &
ECONOMIC COMPETITIVENESS

.....



INFRASTRUCTURE &
LARGE DEVELOPMENT AREAS

.....



CONCLUSION WITH
COMMENTARY FROM THE SCSJ MEMBERSHIP

.....



1.0 INTRODUCTION



The Society of Chartered Surveyors Ireland (SCSI) welcomes the opportunity to respond to the review of the National Transport Authority's (NTA) Greater Dublin Area Draft Transport Strategy 2011-2035 (and the forthcoming revision thereof to 2015-2035). The SCSI has reviewed with interest the consultation document and wishes to commend the NTA on the decision to review the Draft Transport Strategy having regard to the altered plans and proposals that have emerged following a period of economic turmoil. As the Greater Dublin Area reflects on its recent development and the opportunity for a return to sustainable economic growth, the role of integrated land use and transportation planning has never been more crucial. Indeed, the vision for Dublin 2035 to be a "...competitive, sustainable city-region with a good quality of life for all" is reliant on an effective and efficient transport infrastructure.

In developing a revised Greater Dublin Area Transport Strategy 2015-2035, the SCSI recommends that the Strategy must:

1

RECOGNISE THE CHRONIC HOUSING SUPPLY SHORTAGE IN THE GREATER DUBLIN AREA

The urgent need to improve the level of supply of housing to provide for the existing and projected population growth within the Greater Dublin Area (particularly within Dublin) is massively important to the viability of the Strategy and its overarching vision. The SCSI's *Ten Step Strategy to Address the Housing Supply Shortage* (2014) notes that a significant barrier to unlocking supply of housing relates to infrastructural deficits;

2

REAFFIRM THE GREATER DUBLIN AREA'S REPUTATION FOR COMPETITIVENESS

Prioritise reaffirming the Greater Dublin Area's reputation as a dynamic and competitive city region, attractive to Foreign Direct Investment (FDI) and responsive to the needs of business (for employment creation). For example, the SCSI's *Pre-Budget Submission 2015* (2014) highlights that the region has a serious supply shortage of modern Grade A office space and a worryingly low vacancy rate. Such problems are compounded when transport infrastructure investment fails to meet the expectations of international businesses;

3

ENSURE CONSISTENCY WITH REGIONAL, CITY AND COUNTY PLANNING POLICIES

Provide for 'coherent flexibility' to respond to the socio-economic evolution of the Greater Dublin Area, facilitating higher density commercial development in appropriate locations, and nurturing opportunities for economic growth by servicing lands identified for strategic development. The SCSI's *Housing Supply Capacity in Dublin's Urban Settlements 2014-2018* (2014) highlights those areas where significant opportunity exists to bring forward serviceable development land to deliver residential dwellings, connected to planned enterprise and employment locations via a high quality transport network.

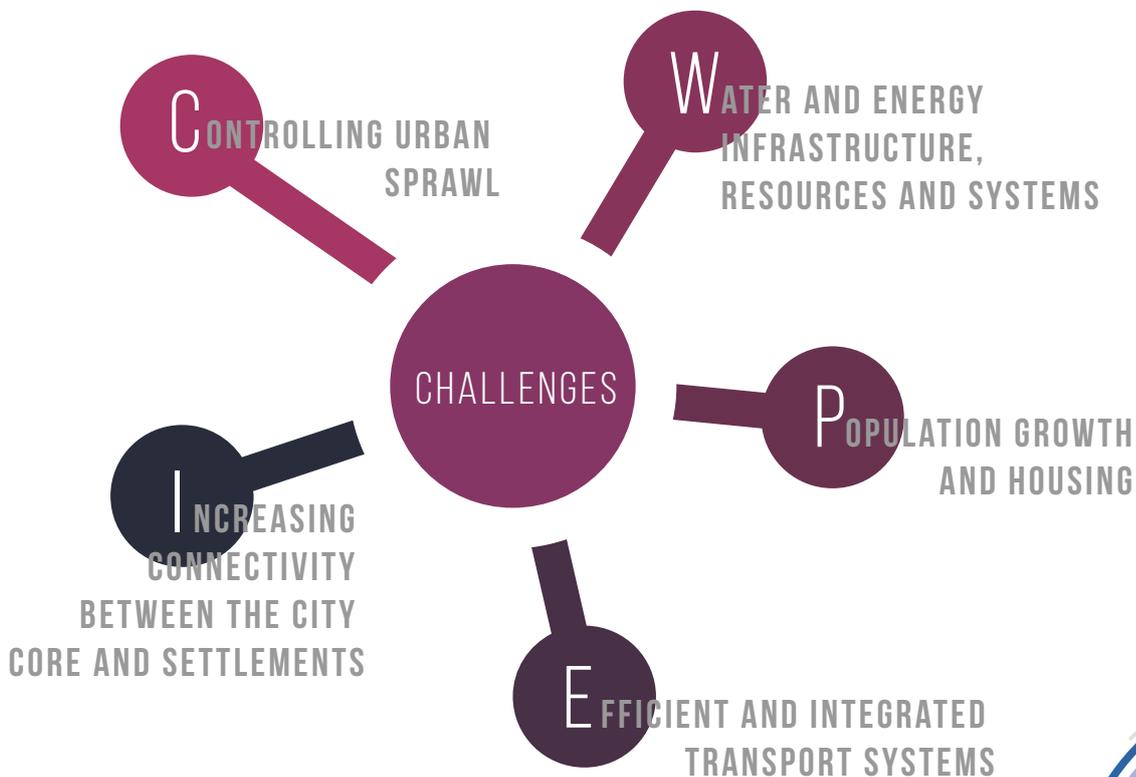
SUPPORTING THE OBJECTIVES OF RECENT POLICY AND PRIORITISATION

4

Be cognisant of, and conducive to, supporting the objectives of recent policy and prioritisation such as Construction 2020 and the Public Capital Investment Programme 2020. Indeed, the SCSi Review of (Capital Investment) Priorities to 2020 (2014) specifically highlights that in addition to national infrastructure road and transport linkages, there is a need to ensure that local transport infrastructure deficits are met through the Public Capital Programme 2015-2020 and sets out specific recommendations in this respect.

The Society of Chartered Surveyors Ireland (SCSI) welcomes the opportunity to respond to the review of the National Transport Authority's (NTA) Greater Dublin Area Draft Transport Strategy 2011-2035 (and the forthcoming revision thereof to 2015-2035). The SCSI has reviewed with interest the consultation document and wishes to commend the NTA on the decision to review the Draft Transport Strategy having regard to the altered plans and proposals that have emerged following a period of economic turmoil. As the Greater Dublin Area reflects on its recent development and the opportunity for a return to sustainable economic growth, the role of integrated land use and transportation planning has never been more crucial. Indeed, the vision for Dublin 2035.

CHALLENGES FOR THE GREATER DUBLIN AREA





2.0

STRATEGIC ISSUES FOR THE GREATER DUBLIN AREA

STRATEGIC POLICY CONTEXT

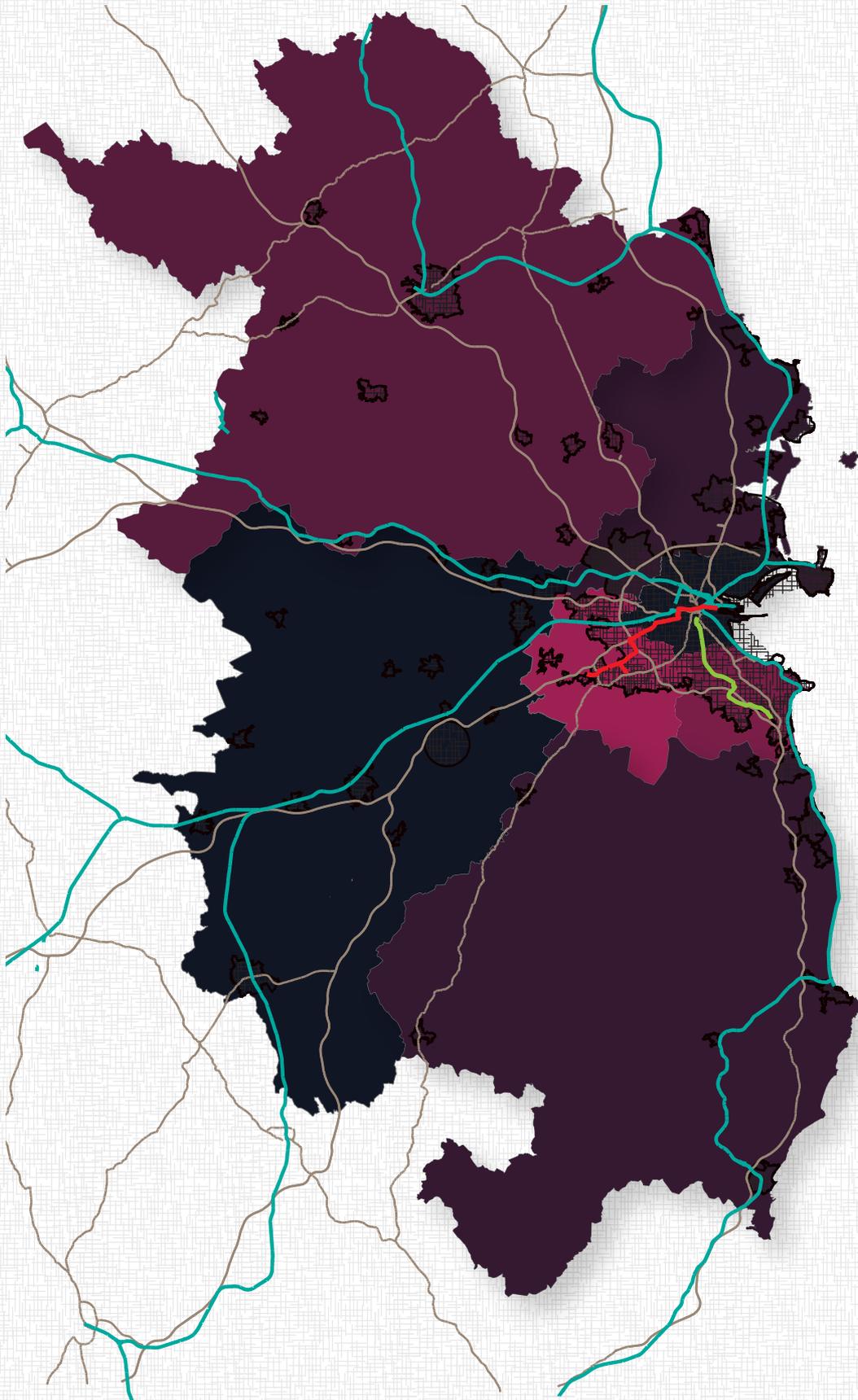
The SCSI recognise that a holistic transport strategy for the Greater Dublin Area is needed, and that future investment in transport infrastructure in Dublin, Kildare, Meath and Wicklow must be prioritised and focussed based on integrated land use and transportation planning objectives. At the overarching level, the SCSI advocates the objectives of the 2011 Draft Transport Strategy, but would pointedly stress that investment in transport infrastructure throughout the Greater Dublin Area must be considered in the context of supporting the delivery of adequate housing supply in areas where demand is not being met (over a long period). Furthermore, the transport network should be enhanced with special consideration of maintaining the Greater Dublin Area's economic competitiveness amongst global city regions.

The DECLG's *Planning Policy Statement (PPS) 2015* reaffirms commitment to quality forward planning, stating that it strives to ensure that the "...right development takes place in the right locations and at the right time and in providing the social, economic and physical infrastructure necessary...". Alongside this, the two new planning bills look to inform and guide the planning and development process. Importantly, both the PPS and the second planning bill initiate the legal context for the review of the National Spatial Strategy, the forthcoming National Planning Framework.

In addition, there are ongoing and emerging activities taking place within the delivery of initiatives outlined in *Construction 2020: A strategy for a renewed construction sector (2014)*. The PPS also refers to the preparation of new Regional Economic and Spatial Strategies by the three new Regional Assemblies and the associated enhancement of the economic development focus of local authorities as provided for under the Local Government Reform Act 2014.

It is in this context that the SCSI supports the NTA's proactive approach to reviewing the transportation requirements of the Greater Dublin Area now and into the future. Ireland's planning and development policies and structures are at an important stage in their evolution. With a coherent approach to national, regional and local-level planning emerging, it is essential that transport infrastructure planning features centrally in this process. The forthcoming Transport Strategy should focus on delivering sustainable transport system in the Greater Dublin Area and appropriately connect transport infrastructure with land use planning objectives (housing and commercial property growth areas), etc.

EXISTING RAIL AND ROAD TRANSPORT INFRASTRUCTURE



- URBAN SETTLEMENTS
- ROAD INFRASTRUCTURE
- RAIL INFRASTRUCTURE
- LUAS ROUTES
- DUBLIN CITY
- FINGAL
- SOUTH DUBLIN
- DUN LAOGHAIRE RATHDOWN
- KILDARE
- MEATH
- WICKLOW





The previous Draft Transport Strategy (2011) highlights 5 no. priority objectives, namely:



The SCSI advocates the proper planning and sustainable development of our cities and towns, and supports the NTA's objectives in this respect. Recognising the challenges that the Greater Dublin Area faces in the years ahead is key to planning appropriately to ensure that the region has a successful and competitive future. The Greater Dublin Area plays a leading role in Ireland as the engine-room of the economy, as a place of connectivity, innovation and creativity, and as an attractive place to live, work and play. As the driver for economic growth, the Greater Dublin Area must build on the asset base of its strong metropolitan region and continue to provide good accessibility to the global market. Indeed, such is the importance of the Greater Dublin Area to the national economy, that the transport infrastructure developments that will serve it must support a thriving, dynamic and resilient region.



When SCSI members were asked whether the Greater Dublin Area needs greater alignment of transport policy with land use and planning policy in order to bring forward land for development, there was a very clear message. **A vast majority feel that greater alignment is needed, but not in such a manner that shifts the burden and/or timing of providing transportation links from policy makers to developers.**



When SCSI members were asked how sustainable development and growth could be facilitated within the Greater Dublin Area, **the majority responded that enhanced coordination between land use and transport services/infrastructure was key to sustainable growth by encouraging intensification and densification of development in existing areas with high quality transport capacity.**

THE '3 X P' MODEL: ADVOCATING SOUND PLANNING PRINCIPLES



PEOPLE

The SCSi strongly supports the delivery of a transport infrastructure within the Greater Dublin Area that will provide for the projected population of the region. The provision of services and facilities, including transport infrastructure (quality public transport, cycle networks, efficient road networks, etc.), are major enablers to the supply of housing to the private and rental market (and to the provision of much-needed social housing). **The Greater Dublin Area is suffering from a chronic shortage in the supply of housing, and pent-up demand is being compounded as a result. This is having a cascading effect on the rental market, and huge numbers are facing significant difficulties in securing housing (across many affordability deciles).** The region's residents also require an efficient and functioning transport network to contribute to quality of life, provide a good standard of linkage and connectivity between residential areas and commercial/employment locations.



PLACE

Place making builds off a local community's inherent assets to create an environment where people's health, happiness and well being are optimised. The SCSi is supportive of the delivery of quality living and working environments to provide opportunities for a growing population. A modern and fit-for-purpose transport infrastructure, particularly public transport provision, is a key element in the creation of attractive and identifiable places. The Department of Jobs, Enterprise and Innovation's *Policy Statement on Foreign Direct Investment in Ireland (2014)* highlights that one of the key pillars in differentiating Ireland's offer in the global economy (for competitive advantage) is "place-making to provide attractive city regions to live, work and attract investment". It is important that the Greater Dublin Area Transport Strategy promotes and facilitates the delivery of quality new housing and enables inward investment and commercial property growth.



POTENTIAL

The Greater Dublin Area Transport Strategy 2015-2035 represents an opportunity for the region to showcase what our transport infrastructure and land use forward planning can offer to globalising enterprises, encouraging sustainable growth and providing jobs that the population both need and want, and in the right locations. New housing can be facilitated by ensuring that lands identified for residential development are adequately serviced, while the Greater Dublin Area should capitalise on its compelling offer by attracting inward investment - to achieve this, the region must have commercial/enterprise zones that are well connected, with multi-modal transport options.

It is acknowledged that major infrastructure projects for the Greater Dublin Area had been planned through Transport 21. Subsequently, *Smarter Travel - A sustainable transport future (2009-2020)* and the associated *Integrated Implementation Plan 2013-2018* give further credence to transport policy and projects. While progress has certainly been achieved, modal shift to more sustainable modes of transport is an ongoing challenge. Improving the accessibility to key destinations within the Greater Dublin Area, and indeed its wider functional area (while consolidating housing and commercial development within the metropolitan area), should be a continuing priority.





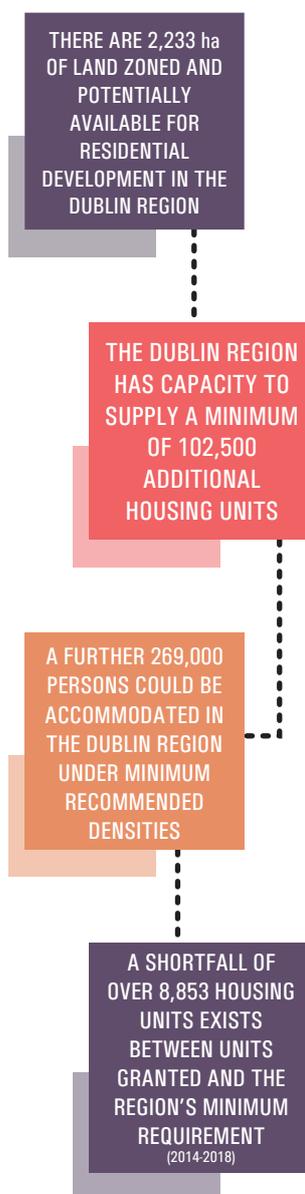
3.0



RESIDENTIAL PROPERTY

The SCSi recognise that, in order to address the chronic supply shortages in the housing market in Ireland, and most notably in the Greater Dublin Area, there are a number of diverse aspects which influence the number of units that can be delivered.

Certainly, the performance of Ireland's economy and wider market conditions will influence the level of investment that is made in the residential property market, at both the 'single house' purchaser level and the major investor level.



With rising rents in the housing rental market most pronounced in Dublin, which is further compounded by the very limited supply of houses, commuter-belt counties such as Kildare, Meath and Wicklow may face additional pressure to cater for demand for housing in the coming years. Alongside this, parts of Dublin where housing pressure has been less intense, such as north and west Dublin, may also face renewed pressure. With less than 11,016 houses built in 2014, Ireland is falling significantly short on annual minimum housing requirements.

The availability of lands zoned for residential development and potentially available for development, based on SCSi research in 2014, stands at 2,333 hectares within the four Dublin local authority areas. The Department of Environment, Community and Local Government's *Residential Land Availability Survey 2014 Summary Report* (February 2015) broadly reaffirms the SCSi's findings based on an exploration of planning data during 2014.

It is clear that there is sufficient zoned lands with capacity to provide for the projected population growth of Dublin. Having regard to the Meath, Kildare and Wicklow County Development Plans respectively, it is apparent that the quantum of zoned lands, including headroom, is sufficient to meet each of their projected populations during the life of their Development Plans, and indeed beyond.

In accordance with the Construction 2020 Strategy, a Dublin Housing Supply Co-ordination Task Force was formed in 2014 to examine the issue of housing supply in the Dublin area. It has indicated that there are extant planning permissions to deliver some 20,000 housing units in the four Dublin local authority areas (with no insurmountable Infrastructural deficits). SCSi research reaffirms this result, finding extant permissions for over 26,000 units (with/without barriers to delivery) within the 4 Dublin local authority areas. A further 25,000 new homes are considered permissible on existing lands zoned for residential use if conditions encouraged landowners/developers to seek permission.



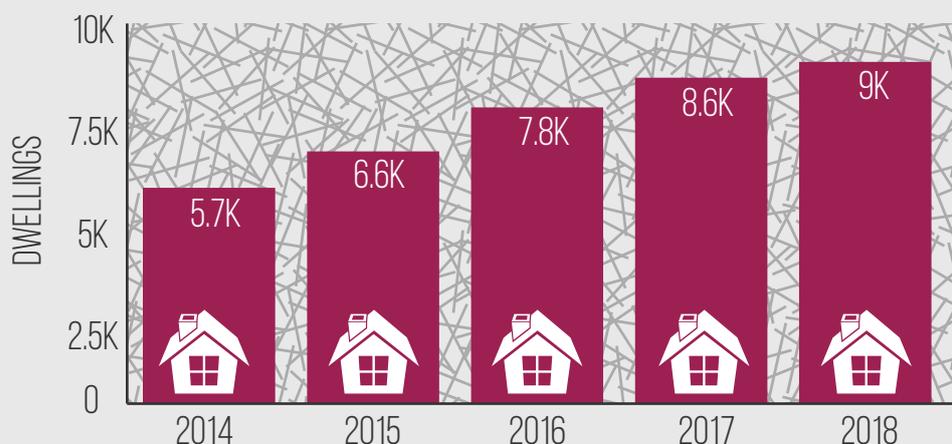
It is submitted to the NTA that due regard must be given to existing zoning patterns in the Greater Dublin Area when reviewing the Transport Strategy, as land use zoning and transport planning go hand in hand.



Perhaps considerations around easing the models for maximum parking standards in residential schemes served by quality public transport, cycling and walking infrastructure should be progressed, as for example underground car parking is one of the major financial barriers to multi-storey residential schemes. In this context, transport corridors or nodes (those areas served by a rail station/bus/LUAS station/stop, if not the entire corridor) should be given careful review in the formulation of the Transport Strategy such that a balance is struck between protecting the transportation corridor and utilising surrounding lands to deliver much needed housing (private, rental, and social housing). Quality, mixed use development at an increased density should be promoted within transport corridors to prevent unnecessary sprawl and optimise the utilisation rate of public transport facilities.

It is understood that Dublin City Council found that there was a total of 440 hectares of land available for housing in 2012. With pressures to meet market demands for low-density suburban houses together with similar pressures to provide for smaller apartments sizes, it is prudent to note that the Housing Agency's *Housing Supply Requirements in Ireland's Urban Settlements 2014-2018* indicates that 56% of the minimum supply requirement for new housing in the Dublin Region will be for one and two person households between 2014-2018. The Transport Strategy 2015-2035 must remain cognisant of these trends and seek to influence how planning policies consider the type and density of housing supply going forward.

PROJECTED HOUSING SUPPLY REQUIREMENT OF URBAN SETTLEMENTS IN THE DUBLIN REGION



MINIMUM HOUSING SUPPLY REQUIREMENT



"Housing Supply Requirements in Ireland's Urban Settlements 2014 - 2018".
Housing Agency & Future Analytics Consulting, April 2014.

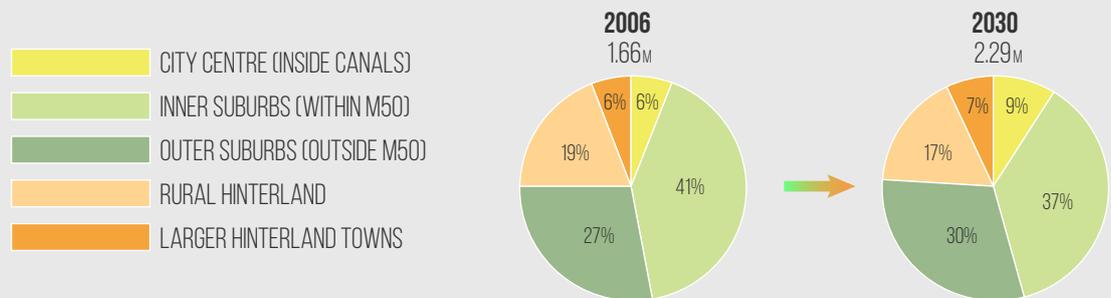




POPULATION PROJECTIONS, HOUSING SUPPLY REQUIREMENTS, & ZONED CAPACITY IN THE GDA

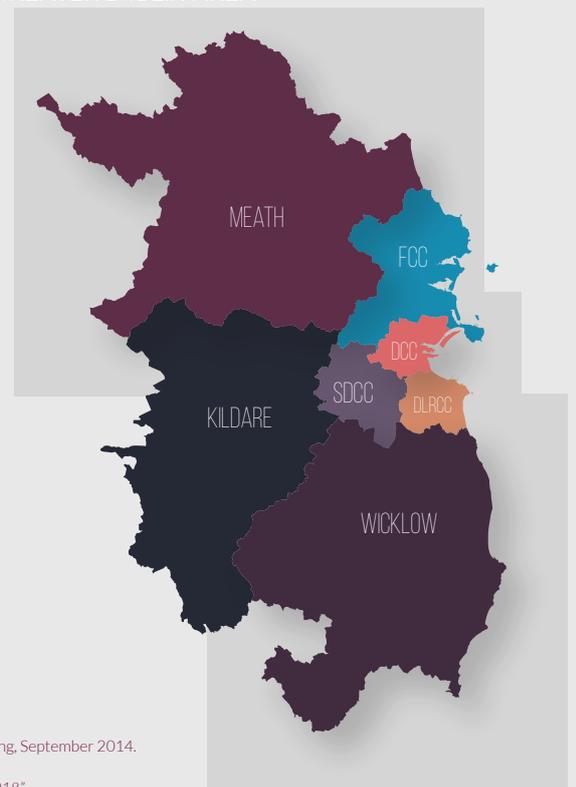
The previous Draft Transport Strategy's estimations for population growth in the Greater Dublin Area indicate that coherent transport planning policy will be critical in order to cater for the increased service demand. Closer alignment of population growth, the requisite housing to cater for this growth, and the provision of appropriate levels of transport infrastructure and public transport services are essential to ensure the continuing proper planning and sustainable development of the Greater Dublin Area. The illustrations below provide some further context regarding the projected additional demand which will exist for transport and transport services within the Greater Dublin Area.

DRAFT TRANSPORT STRATEGY (2011) ESTIMATIONS FOR POPULATION SHARE BY AREA 2006-2030



OTHER PROJECTIONS OF POPULATION & HOUSING IN THE GREATER DUBLIN AREA

Local Authority	2011 Population* Census 2011	2018 Population* Projected	Minimum Housing Requirement 2014-2018
DCC	527,612	535,318	13,751
FCC	130,436	141,316	5,295
DLRCC	201,074	201,996	3,299
SDCC	251,505	265,828	8,515
KILDARE	145,218	156,609	5,201
MEATH	104,245	113,159	3,765
WICKLOW	98,815	104,216	3,033
GDA	1,458,905	1,518,442	42,859

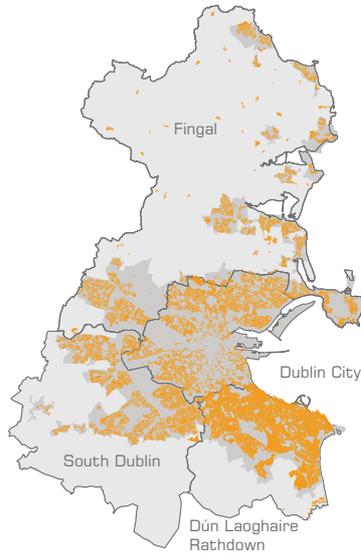


* Note: Population of Urban Settlements only (those in excess of >1,000 persons)

1 Future Analytics "Housing Supply Capacity in Dublin's Urban Settlements 2014 - 2018". Society of Chartered Surveyors Ireland & Future Analytics Consulting, September 2014.

2 Future Analytics "Housing Supply Requirements in Ireland's Urban Settlements 2014 - 2018". Housing Agency & Future Analytics Consulting, April 2014.

EXISTING RESIDENTIAL



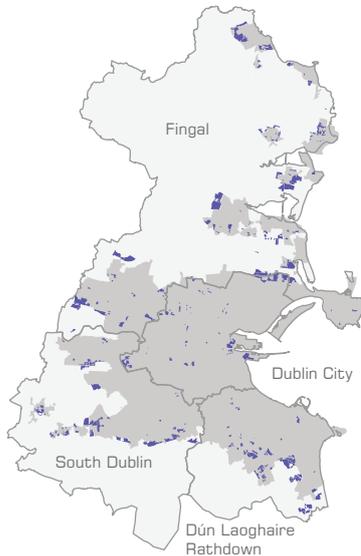
Existing residentially developed areas occupy c. 17,600 ha. or 19% of the total land area of the Dublin Region (c. 92,000 ha.)

DCC - 242,388 Dwellings <small>(46% of total stock)</small>	DLRCC - 86,088 Dwellings <small>(16% of total stock)</small>	FCC - 103,295 Dwellings <small>(20% of total stock)</small>	SDCC - 97,541 Dwellings
---	--	---	--------------------------------------

Total lands zoned for residential development in the Dublin Region



UNDEVELOPED RESIDENTIAL



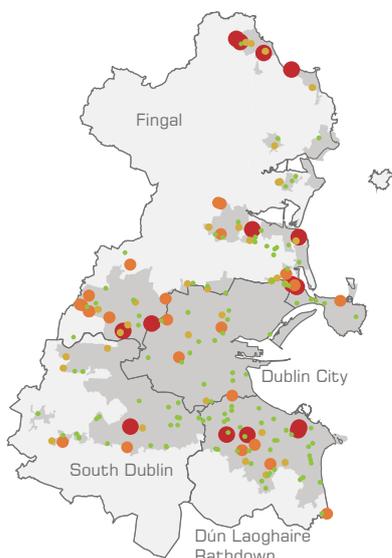
There is c. 2,233 ha. of land **zoned and potentially available for residential development** in Dublin Region over the relevant Development Plan periods and beyond. A significant quantum of which is located in Fingal with much lower figures in each of the other three local authority areas.

DCC - 313 ha	DLRCC - 302 ha	FCC - 1,065 ha	SDCC - 553 ha
------------------------	--------------------------	--------------------------	-------------------------

Lands zoned and potentially available for residential development in the Dublin Region



GRANTED PLANNING PERMISSIONS



The SCSI has also reviewed the granted (extant) planning permissions for new residential developments.

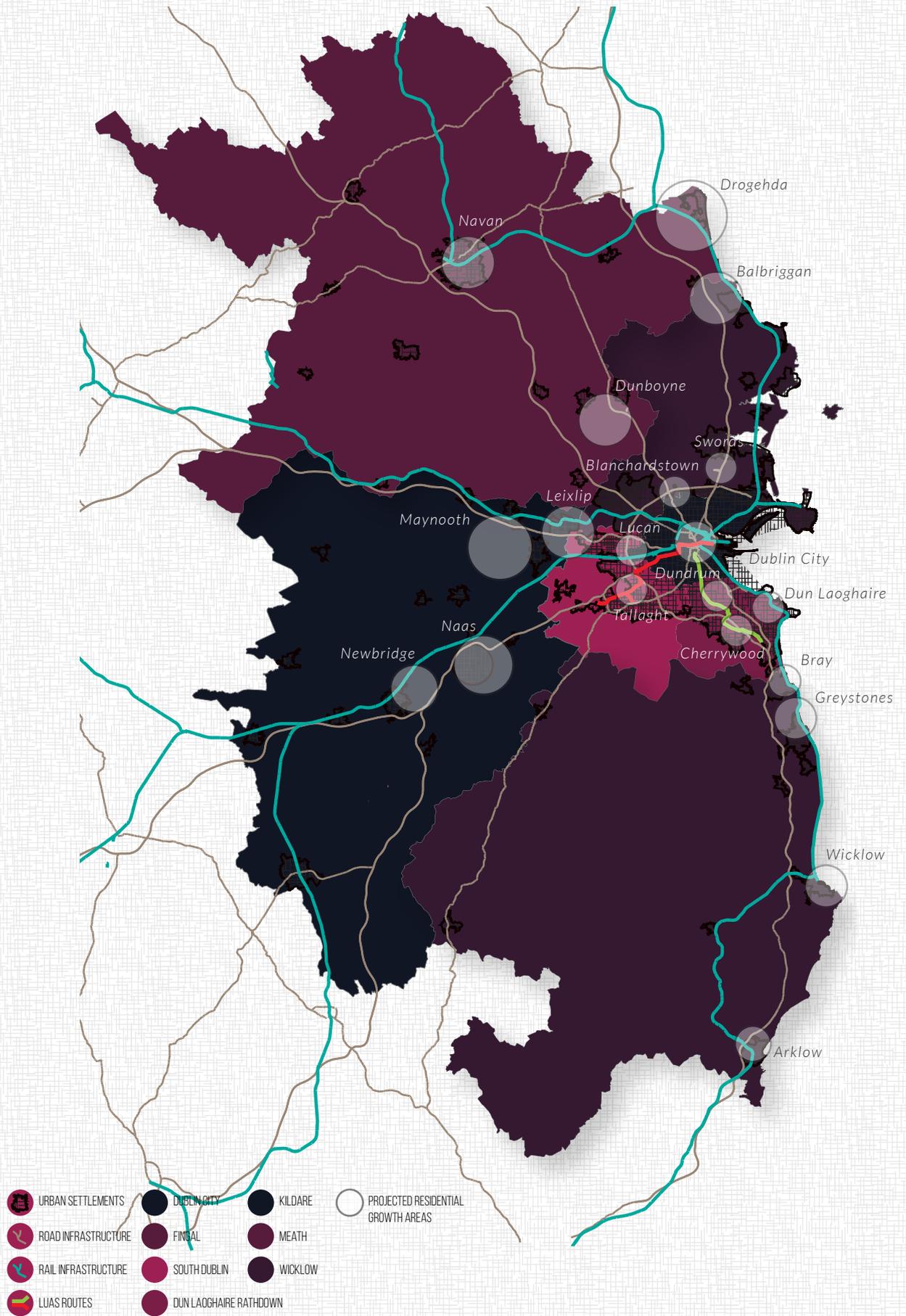
DCC - 44 ha and 2,444 units	DLRCC - 121 ha and 6,070 units	FCC - 514 ha and 15,583 units	SDCC - 64 ha and 2,483 units
--	---	--	---

Granted (Extant) Planning Permissions for New Residential Development (from 2008 to June 2014)





PROJECTED RESIDENTIAL GROWTH AREAS



The challenge of integrating land use and transport is, primarily, to ensure that lands identified as suited to accommodating the projected population growth in the Greater Dublin Area are served by high quality public transport networks. Good quality connectivity and accessibility are a necessity to ensure the functionality and liveability of both new and existing residential areas which will accommodate the population growth within the Greater Dublin Area in the 2015-2035 period. However, ensuring this connectivity and accessibility requires more than just public transport. High quality road networks with good local access, characterised by uncongested infrastructure linkages that connect communities with town and village centres are also an absolute necessity. In this instance, access to a choice of modes, served by high quality infrastructure which will facilitate (and enable the promotion of) walking and cycling are also essential.

The preceding Projected Residential Growth Areas map indicates the various Metropolitan Consolidation Towns and Large Growth Towns (as identified within the *Regional Planning Guidelines for the Greater Dublin Area 2010-2022*) which have been identified as being where the majority of the additional population of the Greater Dublin Area is to be accommodated over the medium term. However, it will be necessary for the forthcoming plans to reappraise the population targets set out in the current RPGs and that this new model is utilised in the Transport Strategy. It is essential that new population (living and working) growth centres are targeted with transport infrastructure investment from the outset, following the infrastructure led model of planning and sustainable development. Such an approach is, however, wholly dependent upon the integration of land use and transport policy.

RESIDENTIAL PROPERTY: SCSI RECOMMENDATIONS



It is important that existing areas with a high residential population continue to be properly serviced by the transport network in the Greater Dublin Area. This includes the maintenance and reliability of public transport services, the improvement in connectivity between settlements via both public transport services and the road network, and the provision of new transport infrastructure solutions to serve new and emerging high-density settlement areas.



The NTA should explore the prioritisation of transport network investments in the context of the need to service lands zoned for residential and mixed-use development. This will contribute to facilitating the supply of new housing to a property market in dire shortage currently.



Phased delivery of the key pieces of public transport infrastructure identified in the Transport Strategy, serving those areas capable of accommodating additional population growth, while also opening up strategically significant lands for the provision of new communities (to house this growing population) over the life of the strategy.





COMMERCIAL PROPERTY & ECONOMIC COMPETITIVENESS

It is widely recognised that the national economy is recovering, with a particularly fast rate of improvement in (parts of) the Greater Dublin Area. Activity in commercial property transactions and rental yields can serve as an important barometer in this respect. The recent SCSi *Annual Commercial Property Review and Outlook 2015* has found that some positive growth trends occurred during 2014:

EXTRACT OF KEY FINDINGS IN SCSi COMMERCIAL PROPERTY REVIEW & OUTLOOK 2015



Office net yield for Leinster Region in 2014

€4,491



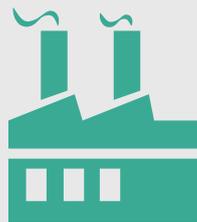
+11.5%

Rents in prime retail areas of Dublin Region fetched an average of €4,491 per sqm (+11.5%)



€2,462 p sqm

Shopping centre rents increased by 17% in the Dublin Region



prime industrial rents under 500 sq.m.

+34.4%

+42.3%

prime industrial rents over 500 sq.m.

Dublin region prime industrial rents under 500 sq.m. at €82 per sqm (+34.4%) and €74 per sqm (+42.3%) prime industrial rents over 500 sqm.



+27%

Office development land values increased by 27% in the Dublin Region



+16%

Retail development land values increased by 16% in the Leinster Region

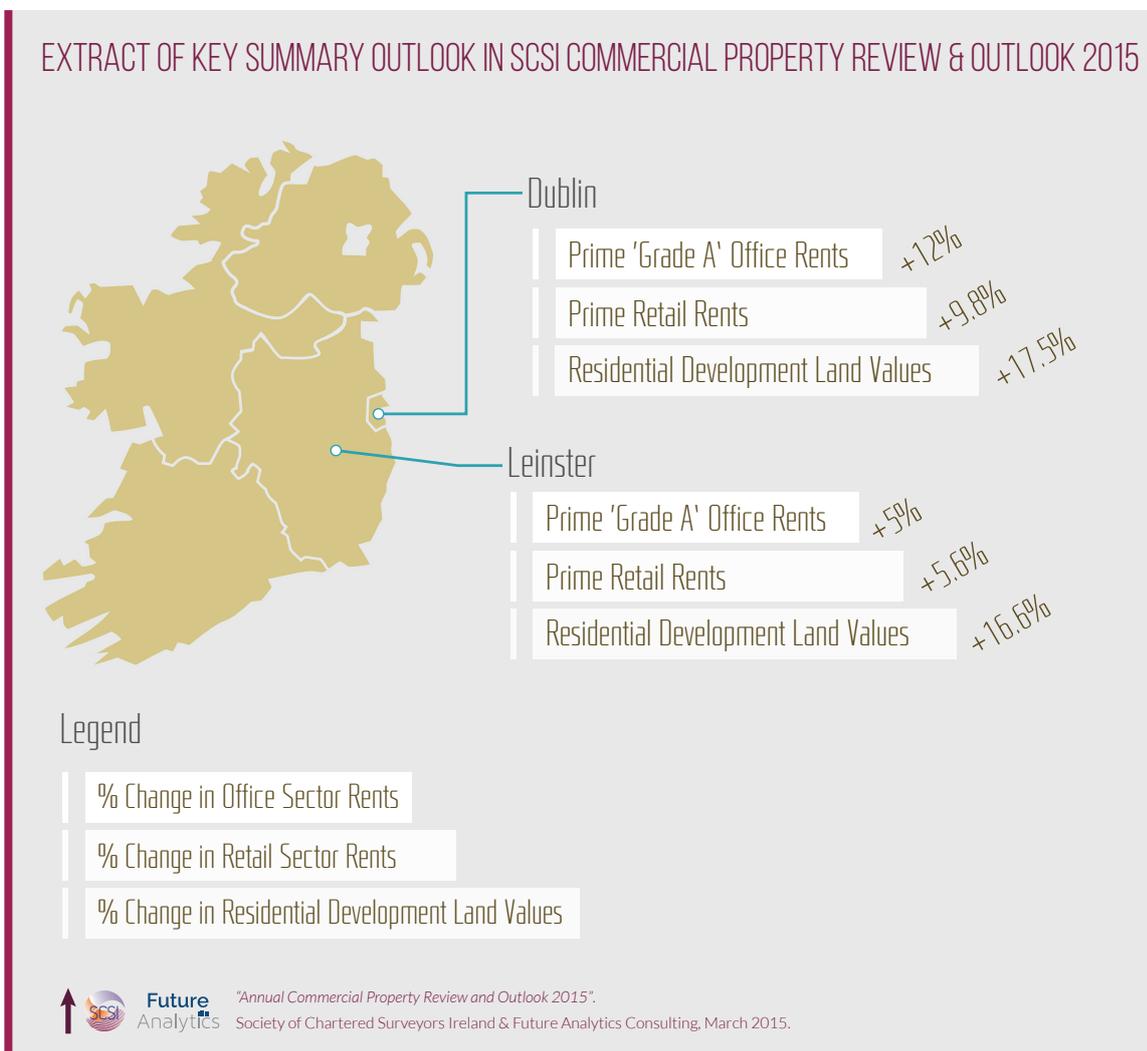


Future Analytics

"Annual Commercial Property Review and Outlook 2015".

Society of Chartered Surveyors Ireland & Future Analytics Consulting, March 2015.

Expectations for 2015 are positive across the spectrum within Dublin and wider Leinster:



The central role played by Dublin and the surrounding region as the “engine room for the national economy” does not however prevent the region from experiencing its own development challenges. These challenges must be tackled and addressed in order for the Greater Dublin Area to maintain its draw as a quality place in which to do business. The provision of a quality public and private transport network is key to long term economic development of the Greater Dublin Area.

The SCSi recognise that increasing urbanisation and industrial growth can provide additional economic benefits, and infrastructural development can support and manage this process. By providing better access internally (within the Greater Dublin Area and throughout Ireland) and consolidating trade links with Europe and internationally, growth in GDP per capita can be accelerated and a greater return on investment in transportation and other infrastructure can be achieved.





Similar to the housing market, and as shown in the above-referenced figures, **supply problems have been experienced, pushing office rents higher**. This is a very important influence on international competitiveness.

In the *SCSI Annual Commercial Property Review & Outlook 2015*, SCSI members reported that the Greater Dublin Area office rent for Prime 'Grade A' offices in 2014 was €452 per sq.m., representing a 29% increase on 2013 prices. Average prime '3rd Generation' offices fetched €389 sq.m., conveying a 13.7% increase. Dublin-based SCSI members expect a 12% increase in rents by year end on prime "Grade A" office space, though with an acute shortage of space in this market segment, that figure could well be exceeded. Indeed, €646 per sq.m. by the end of next year is not unrealistic.

While these increases signify positive growth in the Dublin market, members reported wide-spread concern over the lack of new supply in the region, particularly in prime 'grade A' spaces, whilst similarly concerns over the acute shortage of housing to support the expanding work force was also highlighted. Having experienced a negligible level of construction since the financial crisis, the SDZ Schemes such as the Docklands SDZ will see the commencement of new commercial building projects during 2015. However, it is essential that the fast tracking of commercial property projects that will support sustainable job creation and boost the economy, is facilitated. **A coherent and logical Transport Strategy for Ireland's key economic region will contribute to ensuring that Dublin and the Greater Dublin Area remains attractive for international business.**

The *IBM Global Location Trends 2014 Annual Report* results found that Ireland continues to be "the top performer in the world" for the quality, added value and knowledge intensity of the jobs created by Foreign Direct Investment projects (particularly in the R&D part of Life Sciences and ICT, together with Financial Services investment). Of the top ranking destination countries by estimated jobs, per million inhabitants (2013), Ireland places fourth, while it records the number one slot of "*top ranking destination countries by average value of investment projects*". Nationally, Ireland's position in the World Bank's *Doing Business 2015 Going Beyond Efficiency* report has improved, ranking 13th out of 189 economies. **It is important to note that Dublin sits within the top ten of global destination cities for FDI, based on projects secured.**

The European Commission's *Atlas Mapping the European ICT Poles of Excellence: The Atlas of ICT Activity in Europe (2014)* details the top performing ICT hubs, and Dublin ranks 16th out of 34 regions (1,303 regions were assessed by the European Commission). The *Financial Times 'Foreign Direct Intelligence' Global Cities of the Future 2014/15* ranked Dublin in fourth place, behind Singapore, London and Hong Kong respectively.

Six criteria were explored, encompassing **Economic Potential, Business Friendliness, Human Capital and Lifestyle, Cost Effectiveness and Connectivity, and FDI Strategy**. Dublin came first for large city **Business Friendliness**, second for **Human Capital and Lifestyle**, and second for **Economic Potential**. **Notably, Dublin placed 10th for connectivity.**

A recent report from PWC and the Urban Land Institute, *Emerging Trends in Real Estate - A balancing act Europe 2015*, saw Dublin rank second for real estate investment and development in Europe. The report notes strong rental growth potential based on low supply, together with employment growth. **With an increased interest in Dublin as a property investment centre, the conditions and supports which make the Dublin region attractive must be maintained, and this extends to accessibility and connectivity through the transport network.**

Certainly, there are a multitude of “ranking reports” which pit Dublin against other European and international cities, but the reality is that the Greater Dublin Area is now at the scale, in terms of population, to be in competition with cities and regions globally. International companies have established headquarters here, and many of those Irish companies with a strong export-led focus are continue to operate here. **The SCSi highlights that, for the Greater Dublin Area to remain competitive, sufficient resources must be in place to reflect a quality offer for investors.**

Market size, market growth, openness of economy, financial and economic incentives (e.g. corporation tax), production costs, economic stability, human capital and infrastructure are some of the fundamental considerations for investment decisions to foreign markets. Transportation considerations such as ease of access, connectivity, congestion, commutability, and logistics are all crucially important. The SCSi notes some very significant and beneficial projects which were completed, not least the LUAS network (and ongoing enhancement), the M50 upgrades, bus network improvement, and of course Dublin Airport’s Terminal 2 and the Dublin Port Tunnel. **Continued investment in the Greater Dublin Area’s transportation network will ensure that opportunities for investment continue to be made available.**

9TH Dublin City ranked in 9th place in the IBM Global Top Ranked Cities By Projects 2013 (by number of jobs). An increase of 21% on 2012

1ST Ireland scored highest of countries ranked by average value of investment projects.

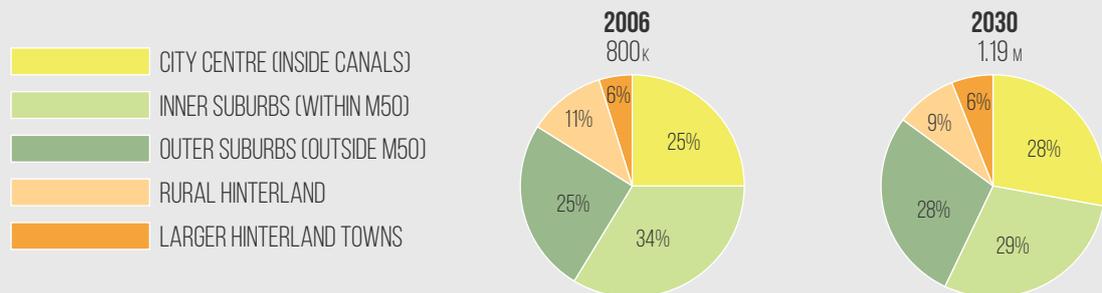
13TH Ireland ranked within the top 15 of countries for Ease of Doing Business 2015.





The previous Draft Transport Strategy's estimations for the distribution of jobs in the Greater Dublin Area indicate that coherent transport planning policy will be critical in order to cater for the increased volume of daily commuting to and from the workplace.

DRAFT TRANSPORT STRATEGY (2011) ESTIMATED DISTRIBUTION OF JOBS 2006-2030



COMMERCIAL PROPERTY: SCSI RECOMMENDATIONS



It is submitted that, to promote a return to sustainable economic growth and competitiveness, a combination of objectives working in tandem is required. For example, congestion cannot be reduced without improving the transport infrastructure and this in turn has a knock-on effect on improving journey times. Certainly, forward planning and looking at servicing future development lands with sufficient capacity transport systems is an important consideration for the NTA in the preparation of the Greater Dublin Area Transport Strategy 2015-2030.



Reappraisal of the level of investment necessary to deliver a quality transport network during the life of the strategy, recognising that transport networks are a central tenet to economic competitiveness.



Alignment of transport infrastructure investment priorities with those strategic land areas where investment and employment creation will occur, connecting the wider metropolitan area and encouraging sustainable growth.



With limited funding available, prioritisation must focus on creating the greatest economic return for the Greater Dublin Area. Revenues and taxes from transport services must be reinvested in line with the increased demand placed on the network by a growing population.



5.0

INFRASTRUCTURE & LARGE DEVELOPMENT AREAS

The influx of a new population to an area can place significant pressure on existing services, facilities and infrastructure. Forward planning methods (population projections, infrastructure audits) and the identification of Strategic Development Zones offer important insights in the emerging and future needs of communities and key settlements.

It is interesting to note the recurring themes among the pool of SCSl members surveyed to feed into this submission, as when locations where public transport services are deemed to be poor were sought, north county Dublin (and in particular the airport and Swords areas) featured strongly. Fingal County Council has the highest capacity to delivery residential development, and the failure to deliver Metro North to date has evidently hindered the land use planning vision for the county. Indeed, some of those areas which may have been served by Metro West, had it been delivered, feature in the responses, with Blanchardstown, Ballycoolin, Lucan and Ballyfermot/Clondalkin deemed to lack adequate public transport services.

As might be expected, commuter towns in Meath and Wicklow seek greater connections with Dublin city centre, as the dominant employment market in the Greater Dublin Area. Closer to Dublin city centre, some respondents feel that some locations fall between being too far a walk from the city centre, and not being adequately served by LUAS or bus services. Examples include Phibsborough, Cabra, Finglas (established settlement areas), and the outer part of Dublin 4 and Dublin 6. Some respondents, for example referencing Dublin 14, spoke of the distances from existing stops to some of the larger residential areas.

The SCSl wishes to highlight that it is important that the Greater Dublin Area's transport network is maintained and enhanced having regard to key infrastructure provision in other sectors, such as healthcare (the delivery of hospitals and other medical centres which require immediate access), education (primary and secondary schools should be served by public transport and good quality walking/cycling opportunities; universities generate large student and staff commutes daily), key residential development areas (those settlements in which population growth is planned, and entirely new strategic zones), and other high-trip generation uses (sport stadia, for example).

Ease of access and transfer from key economic assets such as Dublin Airport and Dublin Port, not only to Dublin city centre but also throughout the Greater Dublin Area, is very important to facilitate balanced growth and sustainable development. Densification among our existing transport corridors and hubs would make more efficient use of land, and the increased throughput on the public transport services would generate greater revenue which would support maintenance and enhancement activities. Higher density development, as part of a drive towards communities with mixed land uses, a sense of place, vibrancy and vitality is needed. By promoting higher density in land use and transport planning, the SCSl submits that sustainable communities can be encouraged. A 'liveable' and attractive town centre, neighbourhood centre or city space that is walking-friendly and served by a quality transport network, will entice investment and economic growth.





It is vitally important that barriers to unlocking the supply of new housing or commercial development are addressed. The SCSi would encourage the NTA to work closely with the Local Authorities within the Greater Dublin Area, and other stakeholders, to mitigate the risk of important developments being delayed (i.e. where new housing would otherwise come to the market, or where employment would be created at a permitted development). Local works such as road upgrades, roundabouts, provision of bus lanes/stops or the construction of improved cycle ways and pedestrian walkways must not delay development that has been permitted and deemed appropriate for an area. The Greater Dublin Area Transport Strategy 2015-2030 should consider not only the 'big ticket' items but also local level, 'enabling' projects that reduce planning risk and enable development to come forward more speedily. By timing the delivery of transport network improvements, the impact of the increased resident or working population to an area is addressed.

PHASED DELIVERY OF KEY INFRASTRUCTURAL PROJECTS

At the strategic level, the residential and commercial property markets, and specifically the challenges in addressing supply issues therein, could be significantly boosted by the phased delivery of some of the key infrastructural projects within the Greater Dublin Area.

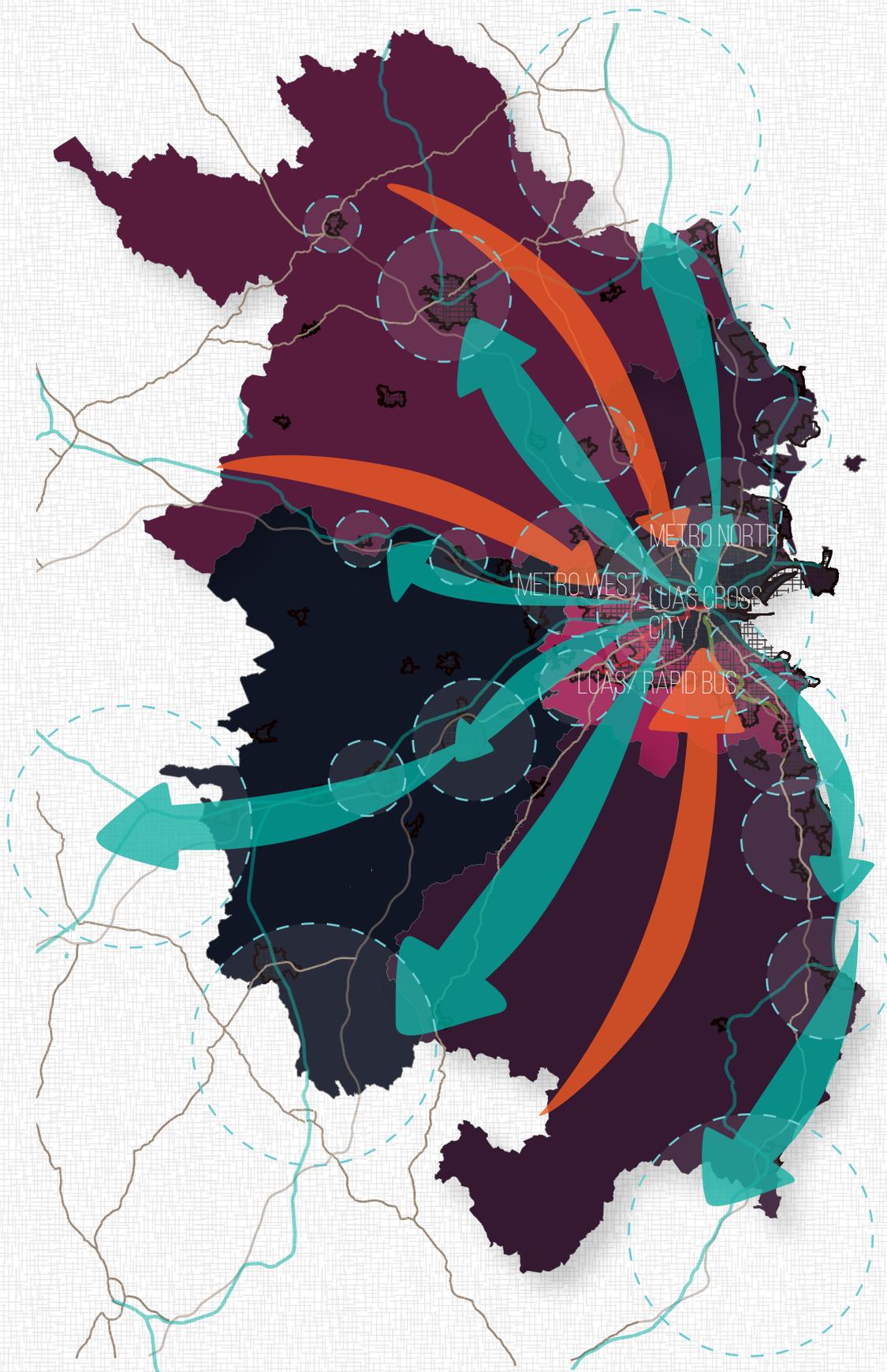
For example, Metro North would connect Dublin International Airport/Swords with Dublin City, and enable Swords to realise its potential as Fingal's county town.

The ongoing LUAS Cross City project in Dublin City could incentivise the build-out of vacant sites along its corridor (the Cross City line will see the city centre commercial/government core link with the docklands, where the IFSC and many ICT multinational companies are based).

At a more regional level, it is recognised that commuter trains coming from Kildare, for example, arrive to Heuston Station, a station that is over 3 kilometres from the commercial core of the Dublin City and the higher density employment zones. As a result, the Phoenix Park Rail Tunnel could serve as a solution, enhancing connectivity and 'freeing up' land that can come forward for development. In the shorter term, Bus Rapid Transit routes may connect major settlements such as Blanchardstown with major destinations like UCD, Swords/Dublin Airport with Dublin City, and Clongriffin with Tallaght.

Integrated land use and transportation planning should enable development at certain key public transport corridors, especially at major interchange points. Key development areas, key district centres and Strategic Development Zones (such as Clonmagadden in Co. Meath, Cherrywood and Grangegorman in Dublin, etc.) should be actively supported through infrastructural supports (e.g. public transport capacity), to be developed out and bring forward housing or commercial property to the market.

INFRASTRUCTURAL CORRIDORS IN & OUT OF DUBLIN CITY



- | | | | |
|---|--|---|--|
|  URBAN SETTLEMENTS |  DUBLIN CITY |  KILDARE |  LARGE DEVELOPMENT CENTRES |
|  ROAD INFRASTRUCTURE |  FINGAL |  MEATH |  TRANSPORTATION CORRIDOR OUT OF DUBLIN CITY |
|  RAIL INFRASTRUCTURE |  SOUTH DUBLIN |  WICKLOW |  TRANSPORTATION CORRIDOR INTO DUBLIN CITY |
|  LUAS ROUTES |  DUN LAOGHAIRE RATHDOWN | | |



Q1

DOES THE GREATER DUBLIN AREA NEED GREATER ALIGNMENT OF TRANSPORT POLICY, IN TERMS OF BRINGING FORWARD LAND FOR DEVELOPMENT WHERE NEEDED.



"The concentration should be on improving public transport within the M50 while also looking at zoning and land use in this area. If we want a more efficient city with better public transport we should concentrate on rewarding land use within the M50 rather than trying to cater for the sprawl outside it."



"A land zoning readjustment is needed, to be based on the existing road, rail, bus, and school infrastructure."



"It is clear that there are still large areas of zoned development lands with little transport infrastructure close at hand."



"Potentially along the Dublin Kildare corridor, densities are not high enough to help promote investment in both DART Extension and Dart Underground."



"Much of the viable zoned lands need only a decent bus service, if only to facilitate access to the nearest LUAS stops/Commuter rail stations and to the nearest commercial/urban centres for shoppers and employees."

Q2

FOR THE RESIDENTIAL PROPERTY MARKET, WHAT ARE THE KEY CONSIDERATIONS IN THE CONTEXT OF A TRANSPORT STRATEGY FOR THE GREATER DUBLIN AREA?



"It is vital to locate mixed use residential developments inclusive of community and leisure, retail, health, employment and education services in close proximity to each other."



"Higher density Greenfield development in the GDA area, Inner city brown field development."



"Delivering sufficient density to warrant/support the delivery of good public transport infrastructure."





Q3 FOR THE COMMERCIAL PROPERTY MARKET, WHAT ARE THE KEY CONSIDERATIONS IN THE CONTEXT OF A TRANSPORT STRATEGY FOR THE GREATER DUBLIN AREA?



“Higher density commercial centres in proximity to public transport nodes are very important.”



“Workers need to be encouraged towards public transport and bicycles i.e. both need to be made viable alternatives e.g. Bray to Airport by car 35-40 mins, by public transport 2 hours or more potentially.”



“Development of High Specification office accommodation in close proximity to transport hubs, development of distribution related industries in close proximity to transport routes, encourage mass rail bulk and container transfer point in major population locations nationally to reduce reliance on road transfer.”



“The Luas is limited in its ability to service much of the areas between the existing lines and the cost of providing the several new lines that would be necessary to substitute for bus routes would be unsustainable.”

Q4 TO SUPPORT INTERNATIONAL COMPETITIVENESS, WHAT DO LARGE ORGANISATIONS “DEMAND” FROM A TRANSPORT PERSPECTIVE TO LOCATE HERE?



“It is vital to locate mixed use residential developments inclusive of community and leisure, retail, health, employment and education services in close proximity to each other.”



“FDI companies seek walking distance, or single mode or transport of journey for their talent of less than 30 minutes.”



“Reasonable turnaround times when shipping items between businesses and their customers domestically and internationally which allows them to plan expenditure and budget time accordingly.”

Q5 ARE THERE SPECIFIC INFRASTRUCTURES THAT WARRANT PRIORITY CONSIDERATION?



“Cost of the Port tunnel during business hours is a definite disincentive.”



“Availability of suitable land, periphery to existing built up and developed areas.”



“Improving cycle lanes, especially around Dublin 1, 2, 3 and 4 would get more people to choose to cycle.”



“City centre-Dublin Airport rail connection.”

Q6 WHAT POLICY OR OTHER EMERGING INTERVENTIONS SHOULD THE TRANSPORT STRATEGY GIVE DUE CONSIDERATION TO?



“The provision of Metro West and other orbital routes require due consideration as part of the strategy.”



“Social housing policy. The spend on social housing must be linked to the public transportation policy, as this is where the greatest dependence on public transport will emerge.”



“PPP, concessions, there is the potential for private firms to complete projects and run them on a concession basis going forward.”



“Development of strategic business districts.”





Q7

DOES THE GREATER DUBLIN AREA NEED GREATER ALIGNMENT OF TRANSPORT POLICY, IN TERMS OF BRINGING FORWARD LAND FOR DEVELOPMENT WHERE NEEDED.



“Transport and transportation capacity must be an integral consideration in zoning. Development should be prioritised and facilitated in areas where potential for public transport is available or can be provided. Greater alignment is essential in developing the future transportation plan.”



“Alignment and harmonisation of transport and planning policy, and enhancing capacity in parts of Dublin (such as in North Dublin) will enable the metropolitan area of the GDA to meet its additional housing needs.”



“There is a clear correlation between employment and accessibility. This should be considered in addressing the problems of areas which feature high unemployment.”



“Where viable transport links are available all land resources should be utilised to cater for growing residential demand. Land should be identified for zoning and advance provision made for bus routes, light rail, etc.”



WWW.

The SCSi undertook an online mapping exercise in 2014 to layer housing planning permissions with zoned undeveloped lands and with public transport corridors.

PLANNING AND ZONING IN DUBLIN - INTERACTIVE MAP VIEWER

https://www.scsi.ie/policy_research/planning_zoning_dublin

Dating back to 1895, the Society of Chartered Surveyors Ireland (SCSI) is the independent professional body for Chartered Surveyors working and practicing in Ireland.

Working in partnership with the Royal Institute of Chartered Surveyors (RICS), the pre-eminent Chartered professional body for the construction, land and property sectors around the world, the SCSI and RICS act in the public interest: setting and maintaining the highest standards of competence and integrity among the profession; and providing impartial, authoritative advice on key issues for business, society and governments worldwide.

Advancing standards in construction, land and property, the Chartered Surveyor professional qualification is the world's leading qualification when it comes to professional standards. In a world where more and more people, governments, banks and commercial organisations demand greater certainty of professional standards and ethics, attaining the Chartered Surveyor qualification is the recognised mark of property professionalism.

Members of the profession are typically employed in the construction, land and property markets through private practice, in central and local government, in state agencies, in academic institutions, in business organisations and in non-governmental organisations.

Members' services are diverse and can include offering strategic advice on the economics, valuation, law, technology, finance and management in all aspects of the construction, land and property industry.

All aspects of the profession, from education through to qualification and the continuing maintenance of the highest professional standards are regulated and overseen through the partnership of the SCSI and RICS, in the public interest.

This valuable partnership with RICS enables access to a worldwide network of research, experience and advice.



Future Analytics Consulting (FAC) is a dynamic SME specialising in strategic spatial planning, research and economic development.

FAC advocates an 'evidence based' ethos, where enhanced decision-making is facilitated through the identification, collection, collation, analysis and visualisation of a broad range of spatial and socio-economic data.

As such, the Company provides credible and robust evidence-based planning and development solutions to inform the formulation of planning policy, strategy, operational plans and development proposals.

With a keen interest in innovation and creativity, FAC also prides itself on a strong awareness of emerging best practice in relation to data analysis and research methodologies, balanced with a comprehensive understanding of their relationship with social and economic development activities.

FutureAnalytics
Planning + Research + Economics

NOTE This report was prepared by Future Analytics Consulting on behalf of the Society of Chartered Surveyors Ireland. Whilst every effort has been made to ensure the accuracy of the information contained in this publication, Future Analytics Consulting and the Society of Chartered Surveyors Ireland do not accept liability of any kind in respect of, or arising out of, the information, or any error therein, or the reliance any person may place therein.

Copyright © The Society of Chartered Surveyors Ireland 2015

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means without the prior permission of the Society of Chartered Surveyors Ireland.

SUBMISSION TO:

NATIONAL TRANSPORT AUTHORITY

IN ADVANCE OF THE PREPARATION OF THE

GREATER DUBLIN AREA

TRANSPORT STRATEGY 2015-2035



SOCIETY OF
**CHARTERED
SURVEYORS**
IRELAND

Society of Chartered Surveyors

 38 Merrion Square,
Dublin 2, Ireland.

 +353 (0) 1 661 1794

 info@scsi.ie

 www.scsi.ie

FutureAnalytics
Planning + Research + Economics

Future Analytics Consulting

 23 Fitzwilliam Square (South),
Dublin 2, Ireland.

 +353 (0) 1 639 4836

 info@futureanalytics.ie

 www.futureanalytics.ie



RICS

the mark of
property
professionalism
worldwide