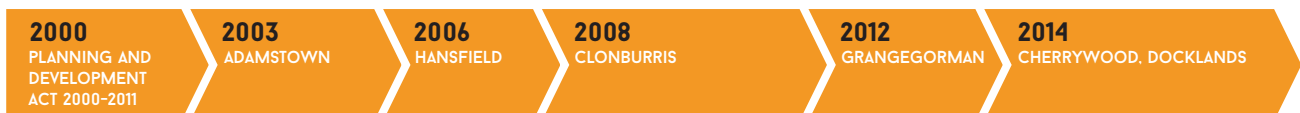


STRATEGIC DEVELOPMENT ZONES

A FAST TRACK PLANNING PROCESS FOR AREAS OF NATIONAL IMPORTANCE



WHAT IS A STRATEGIC DEVELOPMENT ZONE?

Strategic Development Zones (SDZs) were established in planning legislation in 2000. They enable Government to designate certain parcels of land for a fast track planning process, where the development of those lands is considered to be of strategic national importance.

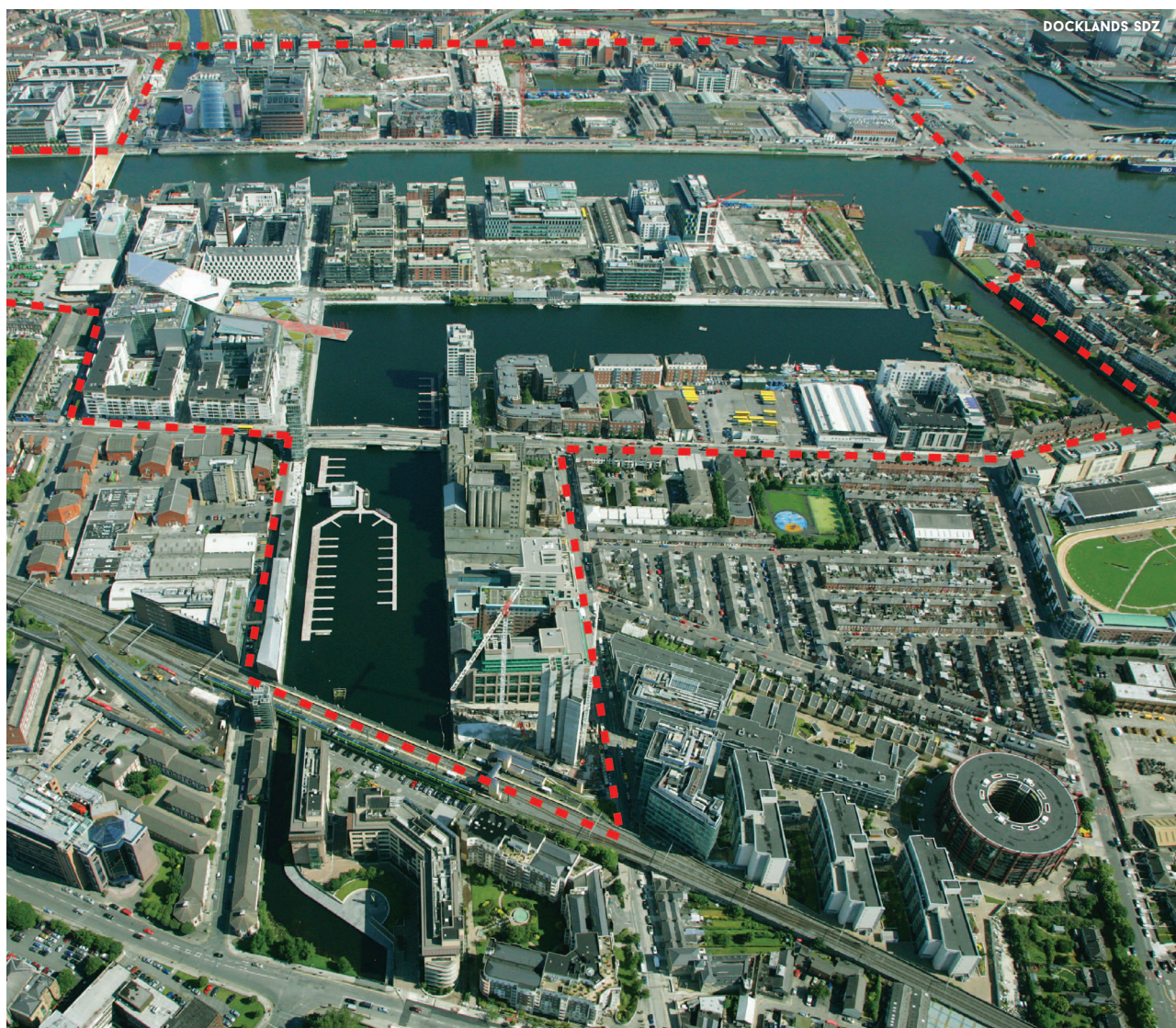
A key purpose of SDZs as defined in the early 2000s was to enable the fast track delivery of new residential and non-residential development in locations of strategic importance in the Greater Dublin Area. The majority of the areas designated at that time were for sites located on major public transport corridors, which were expected to accommodate attractive sustainable new housing

on a significant scale.

In Dublin there are six SDZs. The first SDZ planning scheme was adopted in 2003 in Adamstown with other strategic locations subsequently designated across Dublin.

In recent years three further planning schemes have been adopted: Grangegorman in 2012 and Cherrywood and Dublin Docklands in 2014.

Each of these is expected to play a significant role in Dublin's economic recovery in terms of generating employment and economic activity. This special supplement provides an overview of the key issues impacting SDZs and examines progress to date.



STRATEGIC DEVELOPMENT ZONES

A CATALYST FOR SUSTAINABLE ECONOMIC DEVELOPMENT BUT A NUMBER OF FACTORS ARE SLOWING PROGRESS

Strategic Development Zones (SDZ) were introduced in 2000 as a response to the strong demand for residential and non-residential development that was associated with the previous buoyant phase of Ireland's economic cycle. Six SDZ Planning Schemes across Dublin City and County have been adopted since 2003 and as such they offer developers a holistic plan-led approach and a fast-track planning procedure for development and supporting infrastructure and facilities. These areas are considered by Government to be of economic and social importance to the State.

The key facts on each SDZ are provided in the following pages. SDZs are designed with the long term delivery of infrastructure and housing in mind, but it is fair to say that progress to date has been slower than expected, largely as a result of the property crash since 2008.

In this regard it is noteworthy that three of the schemes have been adopted since 2008, although significant infrastructure and facilities have already been put in place. Among the issues that have delayed progress to date is the fact that a number of the developers who own land in these schemes experienced financial difficulties during the

crash. That said, the fact that many of the related loans and property have ended up in NAMA and have resulted in land sales and changes in landownership has been a benefit to some of the schemes. The wider issue of access to finance is still problematic, while the delivery of a broad range of infrastructure to facilitate development across the SDZs is also a challenge that is currently being progressed by all stakeholders.

These SDZs have the capacity to become major catalysts for sustainable economic activity across the Dublin Region and beyond, by accommodating significant growth in population and employment. With all located on major public transport corridors, they can provide the much sought after sustainable development which is a core principle of government policy.

"The challenge must be to ensure that as the economy recovers, these SDZs are brought to the fore in the re-emerging development market and make the substantial contribution that was originally envisaged for them."

NORTH LOTTS AND GRAND CANAL DOCK (DOCKLANDS)

SDZ OVERVIEW

AREA COVERED BY SDZ

TOTAL AREA WITHIN SDZ: **66 HA**

AVAILABLE FOR DEVELOPMENT: **22 HA**

POTENTIAL FOR NEW DEVELOPMENT

RESIDENTIAL UNITS: **2,600**

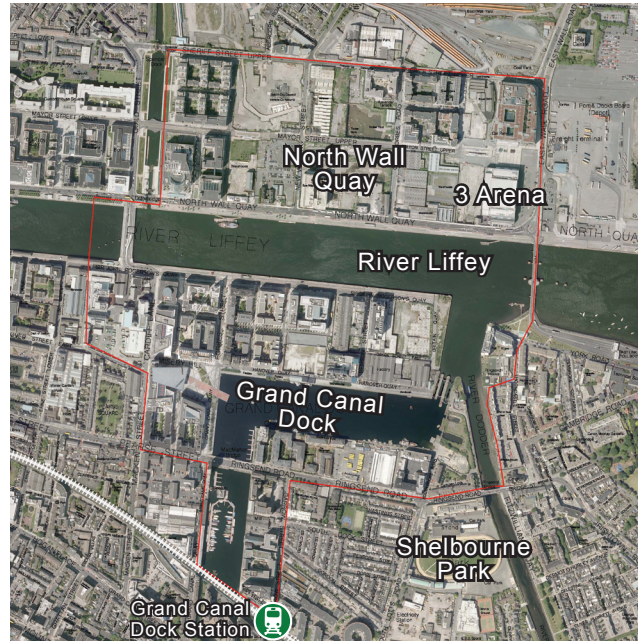
COMMERCIAL RETAIL (SQ. M): **15,000 -20,000**

COMMERCIAL/OFFICE (SQ. M) **305,000 -360,000**

NEW PARKS (SQ. M): **13,000**

ESTIMATED POPULATION ON COMPLETION: **5,800**

ESTIMATED EMPLOYMENT ON COMPLETION: **23,000**



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PROGRESS TO DATE

The Docklands SDZ is perhaps the most privileged of all SDZs, given its strategic location in the Central Business District adjacent to the downtown commercial and financial centres. As an increasingly desirable area to live and work in and which is supported by improved public transport links, the Docklands area is attractive to both developers and commuters. The SDZ was approved by An Bord Pleanála (ABP) in May 2014. The scale and volume of applications received in the Docklands SDZ so far in 2015 is un-matched across the city. Over 50 per cent of the commercial development planned has been lodged and over 22 per cent of the residential development planned has been lodged as planning applications with Dublin City Council.

A lot of the development in the Dublin Docklands SDZ is taking place or planned on sites in which NAMA has a financial interest, comprising over 75 per cent of the total available development land within the 22ha area. The overall amount of office space planned is of the order of 353,000 sq. m out to 2025. Up to 2,600 residential units are also planned over a 7-10 year period. NAMA currently has interests in four operational projects in the Docklands SDZ which are expected to deliver at least 130,000 sq. m of commercial space over the next four to five years.

These are:

- The redevelopment of the Boland's Mill site. Much of the development will be office accommodation but it will also include 42 two- and three-bedroom apartments, a cultural and exhibition space, in addition to retail and restaurant space. Demolition is currently underway with construction planned to commence in Q1/Q2 2016 with completion by end 2017.
- Project Wave in the North Wall is a 90,000 sq. m mixed office and residential development which is expected to commence in Q1 2016 and also includes more than 250 apartments. It will take approximately five years to reach completion.
- A separate fund, the South Docks Fund, has been created by a joint venture consortium between Oaktree, the Bennett Group and NAMA and is expected to deliver around 27,100 sq. m of office space and 158 residential units at 5 Hanover Quay and 76 Sir John Rogerson's Quay. It will take 3 to 4 years to reach completion.
- A separate fund, the City Development Fund, formed by the same consortium, is delivering a further 4,645 sq. m of office space at 6-8 Hanover Quay.

The balance of office space will be delivered up to 2025 on the remaining 11 sites in the Docklands area.



CHERRYWOOD SDZ

SDZ OVERVIEW

AREA COVERED BY SDZ

AREA AVAILABLE FOR DEVELOPMENT: 125 HA

POTENTIAL FOR NEW DEVELOPMENT

RESIDENTIAL UNITS: 7,700

RETAIL TOWN CENTRE (SQ. M): UP TO 40,900

VILLAGE CENTRES: 3 CENTRES (SQ.M): 2,275 – 6,060

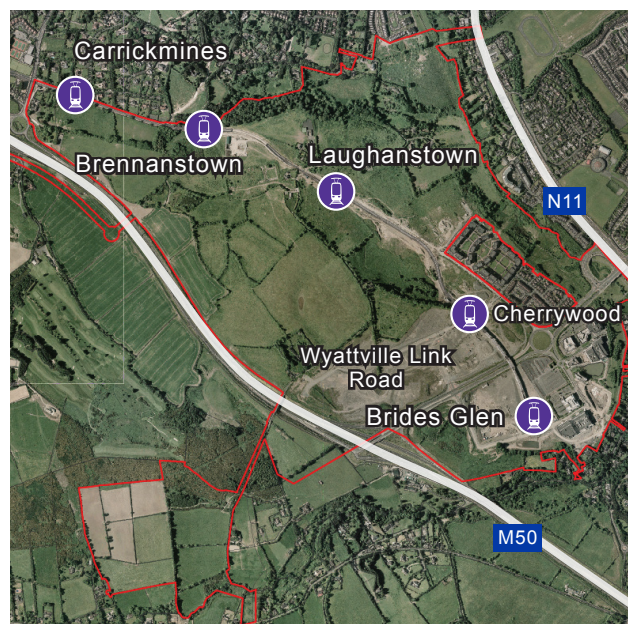
HIGH INTENSITY EMPLOYMENT (SQ. M): 280,000

NEW PARKS: 30 HA

SCHOOLS: 4 PRIMARY AND 2 POST PRIMARY

ESTIMATED POPULATION ON COMPLETION: 21,000

ESTIMATED EMPLOYMENT ON COMPLETION: 20,300-25,800



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PROGRESS TO DATE

The Planning Scheme for the Cherrywood Strategic Development Zone (SDZ) was approved by An Bord Pleanála in 2014. The SDZ lands, approximately 360 hectares, are the largest undeveloped areas in the Dun Laoghaire-Rathdown County Council (DLRCoCo) area and one of the largest in the country. As the Development Agency for Cherrywood, DLRCoCo is working with the landowners to progress the design of major infrastructure required to serve the development. In terms of housing, the Cherrywood SDZ area is expected to provide 7,700 residential units in a new town centre and 3 new villages, a significant contribution to the residential development potential within the DLRCoCo area.

Cherrywood is strategically located between the M50 and the N11, with the last five 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. In 2014 one of the world's largest private real estate developers acquired the Cherrywood Business Park and a substantial landbank within Cherrywood, becoming the largest landholder within the SDZ.

This developer is using its expertise and commitment to bring to the market the build-out of the new residential and commercial communities here.

Due to the range and scale of development planned for the area it is envisaged that the build-out horizon for Cherrywood may span several County Development Plan cycles. The first significant planning applications for road and parks infrastructure to facilitate this sustainable development are expected before the year end.



ADAMSTOWN SDZ

SDZ OVERVIEW

AREA COVERED BY SDZ

AREA DESIGNATED: 223.5 HA

AVAILABLE FOR DEVELOPMENT: 213.9 HA

POTENTIAL FOR NEW DEVELOPMENT

RESIDENTIAL UNITS (AMENDED SCHEME 2014): 8,908 (MAX)

RESIDENTIAL UNITS COMPLETED: 1,384

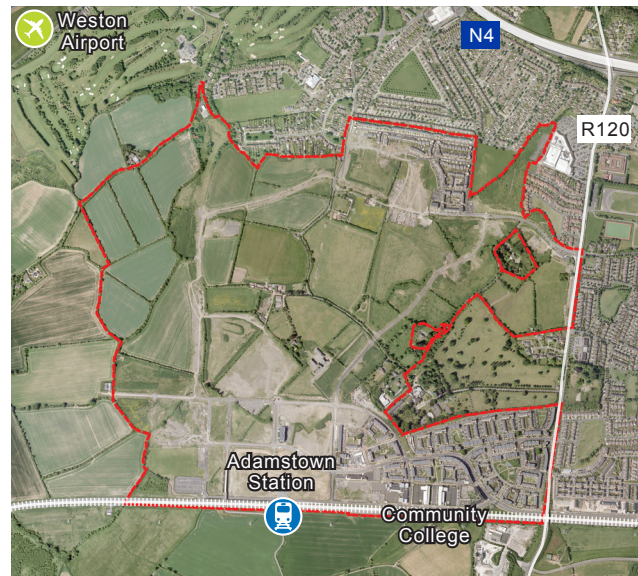
RESIDENTIAL POPULATION ACCOMMODATED: 3,800

NON-RESIDENTIAL (SQ. M) 125,500

RETAIL (SQ. M) 24,175 (MAX)

PARKS: 30.05 HA

ESTIMATED POPULATION ON COMPLETION: 20,300-23,800



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PROGRESS TO DATE

Adamstown was the first SDZ designated in 2001 with the Planning Scheme for the area adopted in 2003. Construction commenced in 2004 with the first occupants moving in in 2006. South Dublin County Council carried out a review of the scheme in 2013, following which an Amended Scheme was approved by An Bord Pleanála in 2014. The Amended Scheme lowered the maximum target for residential units from 10,150 to 8,908, of which 1,384 units have been delivered to date. Development so far has focused on the

Paddocks (north) and at Adamstown Square and Adamstown Castle (south). The following infrastructure has been delivered to date: New railway station, bus, taxi, cycle parking, 2km link road and busway, 300 space Park and Ride car park (temporary), 2 primary schools, 1 post-primary school, 65 place crèche, neighbourhood park, 2 playing pitches, local retail facilities, 110kv electrical transformer station, foul and surface water drainage network and pumping station.

CLONBURRIS SDZ

SDZ OVERVIEW

AREA COVERED BY SDZ

TOTAL LAND WITHIN SDZ: 180 HA

AVAILABLE FOR DEVELOPMENT: 108 HA

LOCAL AREA PLAN: 85 HA

AVAILABLE FOR DEVELOPMENT: 37.67 HA

POTENTIAL FOR NEW DEVELOPMENT (SDZ)

RESIDENTIAL UNITS TARGET: 9,585-11,505

COMMUNITY FLOORSFACE (SQ. M): 36,270

RETAIL (SQ. M): 43,000-53,000

NON-RETAIL COMMERCIAL (SQ. M): 175,500

PARKS: 5-6 NEIGHBOURHOOD PARKS



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PROGRESS TO DATE

The Clonburris SDZ was designated in July 2006 and was adopted by An Bord Pleanála in November 2008. A Local Area Plan relating to the adjoining lands was adopted simultaneously. A review of the Scheme is scheduled to commence over the coming months.

According to South Dublin County Council there has been no substantive progress with respect to residential and commercial development other

than the construction of two new railway stations on the upgraded Kildare suburban line with services running to Heuston Station. A canal side greenway cycle track and bridge have also been completed linking the Adamstown/Lucan area with the City Centre, adjoining the Clonburris SDZ/LAP lands. A new primary school has been completed and a large new post-primary school has commenced construction on the LAP lands.

HANSFIELD SDZ

SDZ OVERVIEW

AREA COVERED BY SDZ

TOTAL LAND WITHIN SDZ: **80.7 HA**

AVAILABLE FOR DEVELOPMENT: **68.5 HA**

POTENTIAL FOR NEW DEVELOPMENT

RESIDENTIAL UNITS: **3,000**

COMMERCIAL RETAIL (SQ. M): **950 - 2,200**

COMMERCIAL SERVICES (SQ. M): **2,100**

NEW PARKS: **2 HA**

EDUCATION/COMMUNITY: **6.5 HA**

ESTIMATED POPULATION ON COMPLETION: **7,500**

PROJECTED EMPLOYMENT ON COMPLETION: **500**



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PROGRESS TO DATE

The SDZ was approved by An Bord Pleanála in April 2006. 175 residential units are occupied (12 apartments and 163 houses). There are outstanding permissions for 961 residential units on the lands (373 apartments and 588 houses). The site is active with residential units under construction in the SDZ (Zones 1 & 3). A decision on 128 residential units is pending by Fingal County Council and 2 further significant planning applications are anticipated this autumn.

The following primary elements of the required infrastructure are in place:

1. Hansfield Railway Station operational
2. Primary School open
3. Post Primary School under construction (opening 2016)
4. QBC on Ongar Road operational
5. Clonsilla Railway Station upgrade completed.

GRANGEGORMAN SDZ

SDZ OVERVIEW

AREA COVERED BY SDZ

TOTAL LAND WITHIN SDZ: **28.69HA**

HSE: **27.71HA**

DUBLIN CITY COUNCIL: **0.57HA**

DIT: **0.41HA**

POTENTIAL FOR NEW DEVELOPMENT

EDUCATION (SQ. M): **270,000**

HEALTHCARE (SQ. M): **42,000**

COMMUNITY (SQ. M): **8,000**

OTHER MIXED USE (SQ. M): **60,000**

ESTIMATED EMPLOYMENT ON COMPLETION: **8,000 TO 10,000**

ESTIMATED POPULATION ON COMPLETION: **2,000 TO 2,500**

EXPECTED COMPLETION: **2025**



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PROGRESS TO DATE

There have been 23 successful planning decisions delivered under the Grangegorman SDZ Planning Scheme to date. The development includes a new amalgamated Urban Campus for the Dublin Institute of Technology (DIT). One of the most significant contracts was the Site Infrastructure and Public Realm project, now substantially complete. Adaptation of several protected structures to cater for the first 1,100 DIT students onsite was completed in August 2014. Following the completion

of a range of new sporting amenities the second stream of DIT students arrived in September 2015. Currently there are two construction projects onsite, the Greenway Hub and the new Grangegorman Primary Care Centre (completion mid-2016). The next phase will involve the construction of two major quads onsite, which are expected to bring 10,000 students to Grangegorman. Other active projects include the new primary school, a community nursing unit, and the academic hub.