



Appendices

Two Year Progress Report Appendix 3 Employment Review



Executive Summary

This report sets out the main findings of the employment land review required as part of the 2 year report under CS5 Objective 6 of the South Dublin County Development Plan 2022-2028. While there are many different locations providing employment within the county, this review focuses on the Enterprise and Employment (EE) lands.

CS5 Objective 6:

To ensure, that as part of the two-year statutory review of the Development Plan, an evidence-based analysis of employment lands, including the potential for agri-hub employment, will be undertaken and should there be evidence for the need for further employment zoning within the lifetime of the Plan, a Variation to the Plan will be immediately initiated informed by:

- Analysis of the type of employment need
- Analysis of the appropriate location(s) to serve such need and the appropriate zoning objective
- Relevant National and Regional policy and proper planning and sustainable development.

The report gives an overview of the key findings from a detailed review of European, national, regional and local policy documents.

It also provides a summary of feedback from interviews with a number of stakeholders from state, semi-state and private bodies with interest in employment lands.

An analysis of the prevalence of different sectors within South County Dublin is set out for the county as a whole and also for selected key employment areas.

Critically, the report examines the take-up of lands within the EE zoning. Having regard to the analysis indicating that there is sufficient land zoned to meet the employment targets, and to the fact that EE zoning constitutes just one of a number of employment zonings, the report identifies that there is no immediate need to undergo a variation to the County Development Plan.

The prematurity of a variation is also relevant when it is considered that the next National Planning Framework has yet to be published in final form and is to be followed by the Regional Spatial and Economic Strategies. South Dublin must have regard to these planning documents.

Furthermore, judgement on a Judicial Review of the County Development Plan remains outstanding at the time of presenting this report to the Members. This is relevant because should the judgement quash the Minister's Direction to omit the EE zoning at Greenogue any review of employment land would have to reflect the availability of lands (or otherwise should the Minister's Direction stand) in this location.

Most importantly for employment within the County, it is intended to publish a South Dublin County Economic Strategy in 2025. This strategy will build on this employment land review. It will identify the future economic direction of the county which will further inform the analysis of future employment land, in particular the appropriate location of zoned lands to meet the needs and direction for South Dublin's economy identified in the strategy.

Introduction

As part of the South Dublin County Development Plan 2022-2028, CS5 Objective 6 states:

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To ensure, that as part of the two-year statutory review of the Development Plan, an evidence-based analysis of employment lands, including the potential for agri-hub employment, will be undertaken and should there be evidence for the need for further employment zoning within the lifetime of the Plan, a Variation to the Plan will be immediately initiated informed by:

- Analysis of the type of employment need
- Analysis of the appropriate location(s) to serve such need and the appropriate zoning objective
- Relevant National and Regional policy and proper planning and sustainable development.

The purpose of this review is to meet the above objective but also to meet the needs of the Council in preparing a new Economic Strategy for the County. The review also examined the levels of vacancy so that policy provision and funding opportunities to prevent any such vacancy could be prioritised. A scope for this employment land review was agreed between the Planning, Economic and Finance departments of the Council with the following aim:

‘That South Dublin will have appropriately zoned employment land in the right locations to meet the needs of its strategic employment vision. That the Council will be in a position to consistently monitor and have up to date knowledge of the uptake of zoned industrial and other employment lands and building vacancy within the county, providing for and facilitating evidence-based policy and land use decision making at both county and regional level. That South Dublin will be able to share that knowledge with stakeholders and prospective employers in a visually accessible and proactive manner’.

The research carried out in this review will facilitate an Economic Strategy for the County to be prepared in 2025 and associated strategic employment vision. Arising from the strategic vision the requirement for employment land will be analysed further in accordance with CS5 Objective 6, quoted above.

Employment Land Zoning Types

There are a number of zonings within the development plan which support employment of different types. These include the mixed-use centre type zonings, that is, Local Centre (LC), Village Centre (VC), Town Centre (TC), District Centre (DC) and Major Retail Centre (MRC) and Strategic Development Zones (SDZ). It also includes Retail Warehousing (RW). The Regeneration zoning objective (REGEN) currently provides for significant employment and will continue to do so in the longer term with a greater emphasis on employment that is compatible with residential and mixed use. Employment is also directly provided for in identified areas of RES-N zoning, mainly to support appropriate local facilities and schools for the new populations.

An example of how mixed use zoning such as ‘town centre’ can accommodate significant business development and foster employment is the Innovation Centre in Tallaght. This new centre facilitates modern and flexible office and coworking space for up to 60 businesses.



Enterprise and Employment Zoning (EE)

A mix of employment types are provided for under the Enterprise and Employment zoning (EE), ranging from traditional SME industrial type use to more modern ‘big box’ warehouses and data centres to international pharma and food industries. It is these lands that are the focus of this report.

Significant work has been undertaken as part of the examination of EE lands including interviews with various state and semi-state bodies, with estate agents and others with specific interests in or knowledge of the economy and the land market. Surveys were also undertaken of the existing industrial estates, including their occupancy levels / vacancy. Using various databases an analysis was undertaken of the presence of different sectors within the County. As part of understanding current and future trends, a research piece was conducted on various economic policy pieces from EU level down to local level.

Finally, an analysis has been carried out on the quantum of EE lands which have been developed since the Plan came into effect and the lands remaining to be developed.

Employment Projections

The County Development Plan sets out the projection for the number of jobs required during the lifetime of the Plan. This is based on a methodology which aligned jobs growth to population growth. This resulted in a target of facilitating an average of approximately 1,500 jobs per annum which equated to a total of 9,168 jobs over the six year lifespan of the Plan.

Since the adoption of the Plan, the government issued new section 28 Development Plan Guidelines for Planning Authorities, 2022. The methodology set out in those guidelines also aligns population growth to job creation but uses the most recent census working population and labour force participation rates to provide a target job growth. The application of this methodology, where based on 2016 Census, would have reduced the employment targets for South Dublin. More recently in September 2024, the OPR produced Practice Note PN04 ‘Planning for Employment Growth’. This is a useful practice note setting out the steps to inform assessment including the understanding of macrotrends set out under the three themes of a) technology; b) economy and business; and c) environment and social.

There is no easy way to project employment growth although the OPRs practice note is the first comprehensive attempt in Irish planning to set out a methodology for sustainable planning for employment. The OPRs practice notes are issued for general information purposes. The Council must have regard to the Development Plan guidelines (or as may be superseded) but a forthcoming South Dublin Economic Strategy will influence the decisions to be made on future zoning of lands based on the type of employment supported by the strategy, the quantum of land to be zoned to facilitate it and its location as a function of employment type and need.

Land Developed Since CDP Adopted

The County Development Plan set out the available lands which had the potential to generate jobs as follows, noting that this was a point in time:

- 554ha of land zoned for Enterprise and Employment (EE)
- 58.27ha of land in Local, Village, District and Town Centres (LC, VC, DC, TC)
- 7.6ha of employment generating land within the Strategic Development Zones (SDZ)
- 5.8ha of land zoned Major Retail Centre (MRC); and
- 1.2ha zoned Retail Warehousing (RW)

It was estimated, based on prevailing job densities, that the available zoned lands had the potential for 34,427 jobs. This far exceeded the projected need outlined above of 9,168 jobs over the lifetime of the Plan. It should also be noted that the 425ha of zoned Regeneration lands in Tallaght and the City Edge lands were not included in the above, recognising that these lands will be subject to on-going change over the longer term with an emphasis on more employment intensive and residential compatible uses. The need for alternative locations to facilitate business from these lands will be further considered in 2025 as part of the Economic Strategy for the County.

Since the Plan was adopted just over 72 hectares (ha) of land has been developed for employment on EE zoned land with a further 3.78ha within Grange Castle landscaped. The distribution across the county of developed land over the two year period is set out in Table 1.0 below.

EE Zoning Area	Completed and Occupied / Ready for Occupation Since Plan Adoption
Baldonnel	4.22
Brownsbarn	4.01
Citywest Business Park	3.49
Grange Castle	5.61
Grange Castle South	30.31
Greenogue	24.50
Grand Total	72.12

Table 1.0 – Distribution of EE zoned land occupied / ready for occupation since August 2022

As can be seen from Table 1.0, Grange Castle South has seen a significant uptake of lands, much of which has been due to the development of large data centres.

The remaining approximately 37ha of land which has been developed since the adoption of the development plan is mostly focused in Greenogue (24ha), with the remaining development in Citywest, Baldonnel and Brownsbarn.

In some instances, there is an observed time lag between the completion of buildings, typically large warehouse type units, and their occupation. This may be because the buildings are speculative and await confirmation of an occupier or for other reasons relating to legal agreements / leases.

Current Zoned Undeveloped Land

As of November 2024, there remains approximately 479ha of EE zoned land which is undeveloped or not yet providing employment (other than construction employment). This can be broken down as follows:

- Undeveloped no permission: 353ha
- Undeveloped with permission in place: 87ha
- Under construction, yet to create employment: 39ha

The location of these lands is indicated in Table 2.0 below.

Industrial Area	Permitted not Commenced	Under Construction	Undeveloped	Total
Baldonnel			18.41	18.41
Ballymount Industrial			7.10	7.10
Brownsbarn/Kingswood			4.82	4.82
Citywest Business Park	5.70	2.03	4.46	12.20
Clondalkin Industrial Estate (Crag)		5.79		5.79
Grange Castle		4.50	17.56	22.06
Grange Castle South			104.18	104.18
Grange Castle West	49.56	26.87	161.60	238.03
Greenogue			18.40	18.40
Manga			3.73	3.73
Naas Road Clondalkin			3.20	3.20
Profile Park	31.37		4.74	36.10
Western Industrial			3.38	3.38
Whitestown			1.19	1.19
Total	86.64	39.19	352.78	478.61

Table 2.0 –Zoned EE lands with remaining potential for employment creation showing distribution within the County. Source: SDCC, November 2024

It is clear from the table that the majority of zoned undeveloped EE lands are in Grange Castle – 283ha - and within that the majority is in Grange Castle West closely followed by Grange Castle South. Profile Park is within the same general location and has 36ha undeveloped.

The largest area of current construction is in Grange Castle West at almost 27ha. Elsewhere there are smaller areas of land under construction at Grange Castle East, Crag Industrial Estate in Clondalkin and Citywest Business Park. These lands are likely to provide for employment in the short - medium term, likely from 2025 on. One of the recent permissions in Grange Castle West is for five individual warehouse units with associated office space to the north of the lands. These will range in size from 70,000sq ft to 197,000sq ft with a fifth site being capable of accommodating a design and build opportunity up to 500,000sq ft. It is understood that two units are pre-let and under construction while the remaining three are inventory buildings yet to be made available.

Of the lands that have permission but have not yet commenced, Grange Castle West has almost 50ha with permission followed by Profile Park with 31ha and Citywest with almost 6ha. None of the other almost 353ha of undeveloped lands have yet got permission suggesting there remains significant potential for employment on them over the coming years.

All industrial estates have some areas of land remaining although it is fair to say that for some the development potential on greenfield sites is now significantly reduced.

There is still potential for more intense development on some sites, and this has not been taken account of in this analysis.

Estimated Progress towards Employment Targets

The target for employment growth in the Development Plan is an average of 1,528 jobs per annum or a total of 9,170 jobs over the 6 year period.

The average density of jobs for all employment lands is 51 jobs per hectare identified through analysis of jobs in the county as part of the Development Plan process and set out in Chapter 2 of the Plan. Based on that average the 111 hectares of EE land developed or under construction since the Plan came into effect, would equate to an approximate 5,661 jobs. However, it is recognised that the average jobs per hectare on EE zoned lands may be less than the average across all employment lands. Nonetheless, when employment created in other parts of the county within different mixed use or other zoning objectives is factored in, it is clear that a significant percentage of the total employment target (based on the target of 3,056 for two years) has been facilitated in the first 2 years of the Plan, if not exceeded.

Sectoral Analysis

A sectoral analysis of EE zoned land was undertaken through the examination of three key datasets:

- Census 2016 Workplace Zones Data (WPZ). (Note: this dataset can be updated when the data is made available by the CSO).
- GeoDirectory which provides detail on types of activity by the standardised NACE code categorisation of business types and which also provides vacancy data.
- Valuation Office (Tailte Éireann) Data which has different categorisations of business type but added value to the above datasets through the provision of floor areas.

Unfortunately, it was not possible to amalgamate the above datasets which would have produced a richness of data and made analysis much more straightforward. However, individually the datasets were capable of providing a good understanding of the type of industry / employment within the County. The desktop analysis was strengthened by a number of site visits to different industrial areas.

Taken as a whole, the County has a diverse and wide-ranging economic base. The top industrial categories by numbers employed in the county, identified through CSO workplace zone data (2016 as 2022 data not yet available), are:

- wholesale, retail trade (31,390),
- education, human health and social work activities (19,018) and;
- information and communication, financial (18,420)
- manufacturing, mining and quarrying (13,285)

The top three industry types are spread throughout the county on different land zonings, providing jobs in many sub-sectors. While much of the retail trade is distributed relatively evenly across the county, much of the wholesale trade is located in established industrial estates. Within the category 'manufacturing, mining and quarrying' it is the manufacturing element of this category that is most relevant to the EE lands as mining and quarrying are generally being carried out on lands zoned RU or in some cases HA-DM.

The Geodirectory aligns with the CSO data in identifying 'retail trade, except motor vehicles and motorcycles' as topping the number of individual businesses within the county. In terms of the number of businesses, the Geodirectory indicates that 'Human health and social work activities' (542) and 'professional, scientific and technical activities' (496) are the next highest business type after retail.

Valuation data estimates a total of 4,764,906 sq m industrial/commercial floorspace in the county. However, this is likely to be larger as data centre size is often not accurately recorded in the data. Nonetheless, the data again aligns with the CSO (workplace zone data) and the Geodirectory with the top three development types by floorspace being:

- Warehouse (2,153,433 sq m)
- Office (1,062,535sq m)
- Retail (437,403 sq m)



The EE zoned lands are providing opportunity for many industry types and jobs identified above. In particular, they are important for warehousing, manufacturing and wholesale. They also support significant office space in some areas of the county, notably at Grange Castle and Citywest. A number of different areas of EE zoning were analysed in more depth, with a selection being presented in Appendix A at the end of this report.

The in depth review of the different areas showed, in general, a low vacancy rate although there were a number of buildings advertised for sale or lease in most areas. Clustering was evident throughout, whether it was the Wholesale, Retail Trade, Construction, Logistics of Greenogue and the City Edge lands (Ballymount / Naas Road) or the mix of Pharma Manufacturing, Data Centres, Logistics in Grange Castle currently noting that Grange Castle West may create new clusters.

Interview findings

As part of the preparation of this report, interviews took place between stakeholders from state, semi-state and private bodies from various sectors of the economy. Each interviewee gave their account of the employment market and insight into future employment trends. The main discussion points are highlighted below based on interviews with the following:

1. **South Dublin Local Enterprise Office (LEO)** (Wednesday 5th April 2023)
2. **Eastern Midlands Regional Assembly** (Tuesday 18th April 2023)
3. **JLL Real Estate** (Tuesday 18th April 2023)
4. **Harvey Real Estate** (Tuesday 16th May 2023)
5. **Department of Enterprise** (Thursday 18th May 2023)
6. **IBEC** (Tuesday 30th May 2023)
7. **Transport Infrastructure Ireland (TII) / National Transport Authority (NTA)** (Wednesday 31st May 2023)
8. **Lisney Real Estate** (Wednesday 14th June 2023)
9. **South Dublin Chamber** (Thursday 6th July 2023)
10. **IDA** (Tuesday, 15th August 2023)

Trends in Employment

- **Emerging Sectors:** Many interviewees gave their opinion on emerging industries within South Dublin. For smaller industries, this included **food, tech and the craft industry**. The larger industries included pharma, data centres, logistics and R&D. Other future focused industry types were based on investment in AI, greener working solutions and the digital transformation, discussed below.
- **Operating Changes:** Many businesses have started to trade differently since Covid-19, moving towards larger 'big box' developments for the storage of their products. The 'just-in-time' means of doing business is now seen as a flawed model and creates risk in getting the product to the customer on time. Supply chain security was identified as an area of key importance. Operational changes will affect how business is done in the coming years, yet it appears not all industries have benefited from operational changes and require a transformation.

Operational changes will continue, making it harder to trend out to the future but all industry types will undergo a transformation due to the digitisation of the working world and as skills uptake increases.

- **Skills Mismatch:** As the populations skills continue to grow, industry type will change to adapt to increased levels of skills available, creating a skills gap which did not exist in the past. Areas of risk include both the hospitality and construction sector, two industries that were hit hardest during the Covid-19 pandemic. The need for upskilling has already been identified for both industry types. When asked, the interviewees felt that linking up with TUD Tallaght could help provide skillsets for the future, alongside with linking up with employers within the County.
- **Digitisation:** Digitisation of the working world is well underway, with many industries reaping the rewards of digitising certain aspects of their business. All interviewees

mentioned the move towards digitalisation in employment, highlighting its importance to allow industries to expand and thrive. Digitisation was seen as a key area of need for industry, as it will attract industries to South Dublin and help current employers to expand.

- **Green Transition:** Looking towards 2050, governments around the world have signed up to particular reductions in greenhouse gas emissions. Business can benefit directly from taking part in this process whether it is future proofing their industry or discovering new markets. The green transition was mentioned by all interviewees, noting that green capabilities now attracts potential clients and new business. It also helps generate new business ideas and employers to the market.

The **Reuse-Replace-Repair** as part of the drive towards a circular economy will facilitate further small industries in the market. The EU has a number of policies and funding regarding the green transition and Ireland also offers grants to move toward greener materials.

Location of Employment

- **Impact of Regeneration (REGEN):** It was noted that REGEN zoned land appears to have a focus on displacement of jobs and removal of industries which already exist on these lands. One interviewee stated South Dublin needs to focus on generating employment within these areas of the county, as its reward will be more intense uses, while also creating homes for those who work in the area.
- **Displacement:** The City Edge project between within the South Dublin and Dublin City administrative areas will create a place for people to live and work as we look to the future, though fears of displacement still exist. This was noted at a number of interviews, indicating that employers are worried they will be uprooted from where they currently operate. It was noted that South Dublin will require a plan to accommodate any displacement of jobs on Regen lands .
- **Council Owned Sites:** It was suggested that the Council needs to control lands to accommodate relocation of industries which have been displaced from other areas of the County, while also providing homes to startups and SME's in the county.

Several interviewees indicated that buildings of between 2000 sq ft and 20,000 sq ft are no longer attractive development types for developers, as the financial return on larger 'box'-type buildings is greater. It was clear from the interviews that the development of employment land can involve multiple complex transactions involving different actors with investment funds increasingly involved in the 'big box' type development. This in turn makes it difficult for smaller SME type business to find properties suitable for their needs. One suggestion was that a policy instrument could be introduced which would require larger employment sites to provide a percentage of smaller units as a means of supporting SMEs and start-ups and counteracting the speculative development of larger warehousing type buildings.

- **Employment Sprawl** was raised in discussion as a trend with the movement of jobs further outside the capital in areas which generally did not provide employment in the past. It was noted that employment sprawl is attracted by good transport links to Dublin City and can facilitate larger industries to move all storage / production under one roof.

Interviewees were questioned on whether a regional approach to employment should be investigated to allow for the examination of the most efficient use of infrastructure and associated land within the individual local authorities, and to deliver on the government's policy of compact growth. Many of the public bodies interviewed favoured a regional approach but noted that it requires substantial planning to be put in place. Nonetheless, a collected effort and 'Regional Approach' was seen as a positive approach to reduce sprawl and identify appropriate locations for different industry types throughout the EMRA region.

- **Remote Working:** Remote working, in particular, had a mixed response during interviews with some taking the opinion that it has benefited their business, with others stating that it has had negative impacts on work due to management issues etc. As remote working remains an important aspect of the government enterprise programme, changes to employees behaviour over the coming years will allow it to develop or reduce. The impact of remote or hybrid working on businesses and on office developments, has yet to be fully understood.
- **Innovation Centres** offer opportunities for young talent and startups to find a home while benefiting from being located beside other like-minded people / industries. Innovation centres will offer opportunities for industries to expand but they do require space to move to. South Dublin should research benefits of offering larger spaces to employers who are looking to expand as they graduate from the supported environment as an early start-up, generating further employment within the county.
- **Location, Location, Location:** The location for potential businesses plays a vital role in attracting employers to South Dublin, as industry often wants to group around each other to reap the rewards of clustering and creating a large knowledge pool. South Dublin, when looking at zoning land into the future, should look at particular industry end users so industries can benefit from other users in the area.

Equally, the role of placemaking in attracting industry was highlighted and the need for employment to be in close proximity to housing. This would reduce travel times to work – a key attractor for employers and employees.

Other Employment Types (Generally outside EE zoned lands)

- **Retail:** Retail plays an important part in South Dublin's total employment number, which was highlighted throughout many of the interviews conducted. As South Dublin's total population continues to grow, there will be more of a requirement for retail workers which will allow for expanding services to be provided.
- **Tourism:** Tourism will continue to grow in importance in generating employment within South Dublin. A number of interviews mentioned that tourism can play a significant role in employment within the county, bringing different job skills and entry points. For the tourism sector to develop further an analysis of all tourism sites and facilities (including hotels) is required, so potential job opportunities and accommodation shortages can be mitigated against.

Other Observations

- **Active Land Management:** In order for South Dublin to track employment developments from planning application to operating business use, accurate monitoring measures are required to distinguish between what is speculation and what land is currently ready for development. A system is required for the council to track development, while also looking at lands which are currently available. Further research is required on monitoring, so that thorough and accurate data can be provided to prospective employers in the County.
- **Conflicting Information:** All interviews offered an insight into the employment market, offering both quantitative and qualitative data. It was clear, and acknowledged by some interviewed, that there is conflicting information coming from different sources regarding employment. Some are of the opinion that there is a requirement for further land to be zoned within South Dublin for employment uses, while others are of the opinion that more can be done with the land which exists through operational / technological changes. Reflecting on this, it seems fair to believe that the two would not have to be mutually exclusive and the challenge may be more how to encourage businesses to maximise their use of land through technological or operational changes while still facilitating lands for new business.
- Outside the interviews, the Council has been advised that there is a need for land which can accommodate yards to facilitate the needs of different sectors for outside space.

Policy Context

The European, National, Regional and Local policy context was examined across a number of policy documents and research papers.

Key areas for further consideration to the development of South Dublin's economy and to the forthcoming Economic Strategy are highlighted through recommendations or observations arising from the examination of these policy documents and trends.

These can be broadly summarised as follows:

Recommendation 1

South Dublin's economy requires jobs which will be able to provide the people of South Dublin with employment now and into the future. A concerted effort should focus on facilitating the skills required to deliver jobs as well as up-skill for future jobs which the county wishes to attract. There should also be a focus on retraining those who have jobs within 'sunset sectors' as their roles are phased out. To this end, synergies with third level institutes should be developed further and support provided for apprenticeships.

Recommendation 2

The Economic Vision of South Dublin should look to the future up to 2050 and should support the Zero Carbon based economy and measures to provide for it. Additionally, all business within the County should be made aware of opportunities within the zero carbon economy and supported in their transition where possible.

Recommendation 3

South Dublin should support changes in manufacturing and changes to supply chains, recognising in particular the changing markets and the digitisation of the workplace. South Dublin should aim to provide information and knowledge of funding mechanisms available to all stakeholders through a supporting role.

Recommendation 4

South Dublin's Economic Strategy should aim to nurture and grow SME's within the County at different stages along their lifecycle, recognising the competition for land. In this regard there should be continued support and mentorship. The Council should also consider ways to support SMEs in accessing buildings / land to grow and create further SME jobs.

Recommendation 5

South Dublin's Economic Strategy should reflect the need for different types of development – land intensive such as office and land extensive such as warehousing / data centres and other uses – ensuring that they are located to reflect national and regional policy including the different employment density and transport needs at a regional scale. In this regard, South Dublin should seek to influence the NPF and the employment strategy in the 2024 RSES.

Recommendation 7

South Dublin should consider the potential for redevelopment of vacant office space for other uses within the County, where there is currently no provision of, or plans for, high -quality public transport.

Recommendation 8

An economic strategy for South Dublin should continue to support the re-intensification of REGEN lands along the Naas Road and within Tallaght, helping identify appropriate uses once the necessary infrastructure has been put in place and the provision of a high-quality public transport corridor is established throughout these areas. Identification of land for relocation of business which have potential to move should be a key element of the Economic Strategy, with relocation within South Dublin, or the wider Region where appropriate. The requirement to minimise the need for private transport to employment locations and to align population growth with employment should be a key criterion for the location of future employment.

Recommendation 9

South Dublin should support the food industry as a growing market both nationally and internationally, providing aid to startups looking for appropriate locations to set up. As part of the Strategic Vision and through LEO, the county should aim to maintain and grow all food industries currently operational within the County.

Recommendation 10

South Dublin's Economic Strategy should aim to continue to support and facilitate sustainable agriculture, horticulture, forestry and other rural enterprises at suitable locations in the County while also protecting the rural landscape and its biodiversity.

Recommendation 11

South Dublin should provide and strengthen policy which will enable the expansion of linkages between IDA clients and SME's within the County through clustering, global sourcing, R&D joint ventures and innovation collaboration building on the progress to date in creating the Innovation Quarter and WorkIQ at Tallaght.

Recommendation 12

South Dublin should support up-skilling and re-skilling within the county, with the aim to facilitate local jobs by encouraging the required 3rd level and associated education facilities to include relevant courses on their curricula and to locate and expand within the county as necessary

Recommendation 13

South Dublin should provide an analysis of retail opportunities in South Dublin, with the aim to respond to likely future trends and provide what is required by this sector. It will also support the update of South Dublin's Retail Strategy following the completion of any updated Regional Retail Strategy consistent with RPO 6.10 and 6.11.

Recommendation 14

South Dublin should allow for the creation of further tradable sectors by putting in policies which successfully support catching up and the development of South Dublin as part of a well-functioning city that supports productivity within its area and beyond. Aligned to this South Dublin should support Smart Specialisation to help firms boost productivity, increase exports and diversify markets

Recommendation 15

South Dublin should continue to examine how best to support green industry for start-ups and existing businesses including through creating awareness of the funding mechanisms available through, for example, the Green Deal.

Recommendation 16

South Dublin should Work with sectors to adopt and build capability in Industry 4.0 technologies.

Recommendation 17

South Dublin should consider nominating Digital Ambassadors to demonstrate the positives for businesses of engaging with digitalisation.

Recommendation 18

South Dublin should review and consider for inclusion the strategic objectives from Dublin Regional Enterprise Plan to 2024 as part of the Economic Strategy, 'piggy backing' on any projects which will improve and increase employment and opportunities in our economic sector.

Conclusion

Leading up to the adoption of the Plan in June 2022 there was 627ha of zoned land to facilitate employment. 554ha of those lands were zoned with the objective Enterprise and Employment, EE.

The employment land review report focuses on the EE zoned lands and identifies that the county still has a total of 439ha of land undeveloped with a further 39ha under construction. There is permission on 87ha of these lands, but no development has commenced to date.

72ha has been developed since the Plan came into effect with some units still awaiting occupation.

The target for employment growth in the Development Plan is an average of 1,528 jobs per annum or a total of 9,170 jobs over the 6 year period.

The average density of jobs for all employment lands is 51 jobs per hectare identified through analysis of jobs in the county as part of the Development Plan process. Based on that average the 72ha of land developed since the Plan came into effect would equate to 3,672 jobs with a further almost 2,000 jobs potential in the pipeline. It has been recognised that the density of jobs may not be as high as 51 within all EE zoned land but given that the employment target is for all zoned lands in the county it can be reasonably assumed that this average and more has been achieved over the first two years of the plan period.

Having regard to the analysis indicating that there is sufficient land zoned to meet the employment targets, and to the fact that EE zoning constitutes just one of a number of employment zonings, there is no immediate need to undergo a variation to the County Development Plan. The prematurity of any new zonings is also relevant when it is considered that the next National Planning Framework has yet to be published in final form and is to be followed by the Regional Spatial and Economic Strategies. South Dublin has to have regard to these planning documents.

Furthermore, judgement on a Judicial Review of the County Development Plan remains outstanding at the time of presenting this report to the Members. This is relevant because should the judgement quash the Minister's Direction to omit the EE zoning at Greenogue any review of employment land would have to reflect the availability of lands (or otherwise should the Minister's Direction stand) in this location.

However, it is recognised that there will be a need to zone employment land going forward, not least to accommodate any displacement from Regeneration lands. In this regard, it is the intention to publish an Economic Strategy for the County in 2025 which will build and further reflect on this employment land review. Critically it will set out the future economic direction of the county which will further inform the analysis of the needs of future employment land, in particular the appropriate location of zoned lands to meet the needs of the type of industry and employment identified in the strategy.

Appendix A – Sectoral Analysis of Selection of Employment (EE) Areas

Grange Castle Industrial Area

Examining the business types in this area it is clear there is a presence of both multinational and SME business with 48 separate business types identified through the Geodirectory.

This area has attracted a significant number of blue-chip national and multi-national corporations with significant investment being made over the past decade in infrastructure and services to support this economic growth area. Grange Castle Business Park is identified in the Regional Spatial and Economic Strategy MASP as a strategic development area for the promotion of high-tech manufacturing research and development. At present and taking account of building completions and under construction in this general location, there is still 333ha available, demonstrating a large availability of land.

On the ground, much of this area is made up of large, multinational companies operating out of a mix of large office / warehousing / manufacturing style units. These large providers of manufacturing employment have opportunities to expand further, as witnessed by Pfizer, being located on large landbanks. The main industry types which operate in this location include pharma, data centres, food industry and distribution sector. The area is well connected by road although the location requires improvements to public transport linkages and public access from surrounding accommodation.



From analysis and site visit to these EE lands, it is clear it can continue to attract manufacturing industry types (i.e. Pharma and food) with research and development opportunities which can provide employment now and into the future. This can be seen in the data available above with manufacturing accounting for over 20% of all NACE codes in the area.

Grange Castle West has also seen interest from the movie / film industry, with the possibility to provide studio locations within easy reach of Dublin City and connections to the remainder of the country. Though these type of media developments are land hungry, they also provide good employment with significant potential for this development to act as a catalyst for clustering

including of smaller units within existing areas of development as well as zoned greenfield locations.

Retail, wholesale products (including motor vehicles) account for 9 category types, highlighting the diversity of business within the Grange Castle area. These uses are generally based in Kilcarbery Business Park. Construction has a total of 6 business types registered in this location, for instance, Winthorp, Murray construction.

Data processing, hosting and other related activities; web portals account for 3 different category types registered at this location. Data centres account for much of the existing space located within Grange Castle and Profile Park with further permissions to be built out. In general, data centre footprints start at approx. 3000 – 6000 sqm for smaller data centre providers and can grow up to approx. 16,000 sqm per building. These units offer the providers large space to operate within, though the return for employment is generally lower than providing other use types.

Vacancy: There is a very low rate of vacancy identified in this area.

Clustering: Pharma Manufacturing, Data Centres, Logistics

Citywest Business Campus

Citywest offers diverse and a high-quality location for employers having been developed as a landscaped business campus. Looking at the CSO workplace zone dataset, the working population for the area was 7,624. Within this location Information and Communication, Financial is the main provider of jobs (3,732), with many indigenous SME's and larger multinationals operating from this location. These include small providers like MacLachlan and Donaldson operating from Kingswood Avenue and large multinational like Eir operating along Bianconi Avenue. Wholesale and Retail Trade also provides jobs within the location, with many wholesale providers including Shop Equipment Limited and Control Equipment Limited. Manufacturing also provides 1,577 employees to the area, including AMD, the large microchip manufacturer.



The Geodirectory data aligns with this, with professional, scientific and technical services operating 31 businesses, computer programming, consultancy and related activities operating 25 businesses and retail trade, except of motor vehicles and motorcycles operating 16 businesses. In total there are a total 186 different categories of business operating in this general area.

The valuation office data shows a total floorspace of 272,415sqm, breaking down by top three as Office (145,641sqm), Warehouse (99,289sqm) and Factory (8,564 sqm). Looking closer at the valuation data, it is clear to see several building types and sizes show up consistently throughout Citywest.

Office space accounts for just under two thirds of the total development on the ground, with many companies operating from Citywest. The breakdown of this space is diverse in size and landholding. At the Waterside at Kingswood Avenue, these large office blocks offer various size office units over 4 floors, from approx. 750 - 1326sqm. These units have attracted multinationals like SAP and Fidelity Investments Ireland. Smaller office units are also available within the industrial estate along Citywest Road where they vary in size from 140 – 250 sqm.

Warehousing also provides 99,289sqm in the Citywest area, but operating with a combination of office / warehouse style units. These are typically occupied by both SME's and Multinationals, with variety in size based on the needs of the employer. For SME's the warehouse / office units are usually in office space of approx. 150 – 600 sqm. Larger SME's and Multinationals operate in larger warehouse units, for example, Control Equipment Limited operate out of a 1257 sqm warehouse with a combined 620sqm office and 118.6 sqm store. Uniphar in comparison operate out of an approx. 15,000 sqm warehouse facility with 4371sqm office space. The diversity in size is linked directly to operations of a company.

Vacancy: At time of writing there was a 4.3% vacancy identified in Citywest.

Clustering: IT and Manufacturing

Greenogue and Aerodrome Business Parks

Greenogue and Aerodrome Business Parks currently attracts many wholesale, construction and SME's to this location, including recent growth in logistics providers. Looking at the workplace zone dataset, the working population in 2016 was 3,873 (awaiting CSO data to update to 2022). The top industries in this location include Wholesale, Retail Trade (1,288) with many small and large providers operating from this location including Roca Bathrooms Ireland and Zeus Packaging Limited. Information and Communication, Financial services also accounted for 802 employees in this location, with a number of accountants operating within this area. Many of the warehouse facilities also have office space for staff typical of this industry type.

The above data is backed up by the Geodirectory dataset, with a total of 299 individual NACE codes registered to the Greenogue and Aerodrome Business Parks area. With over 70 different NACE codes (categories) recorded in this location for Wholesale, Retail trade, it is evident that this industry type flourishes in this general location. Construction also appears high in this location with over 37 NACE codes registered to this area, due to warehousing and yards being provided. Professional, scientific and technical activities (52) and administrative and support service activities (32) also appear high on the number of businesses.

The valuation office data shows a total floorspace of 635,346sqm, the top three breaking down to Warehouse (451,585sqm), Store (84,417) and Office (82,706).

Greenogue provides a number of warehouse units with ancillary office and store facilities of varying size. A number of these units have been acquired by multinationals and range in size. For example, in Greenogue Logistics Park, Building 2 has warehouse space of 23,624.9sqm and

office space of approx. 3,000sqm and Site H within Aerodrome Business Park has warehouse facilities of 3,771sqm and Office facilities of 349sqm and yard facilities of 7509.48 sqm. These forms of buildings provide large units which can be adjusted to accommodate a variety of end users.



Greenogue Business Park also provides a home for many smaller industrial users, of light industry, wholesale and retail trade, though these trades are not exclusive with many small manufacturing facilities and yards operating at this location. The variety of units offered for smaller indigenous industry includes Warehouse facilities of 61.6sqm with office of 68.8sqm at Grants Square. These are generally on the small side with many facilities ranging from 150 up to 1000sqm within Greenogue.

Yard facilities occur throughout the Greenogue Business Park and vary in size. These usually only require a hardcore and can provide both storage and showroom facilities for many construction and machinery / motor sales companies. In general, this form of use class range in size from approx. 1500 – 6500 sqm within the business park.

Vacancy: Very low levels were identified in Greenogue.

Clustering: Wholesale, Retail Trade , Construction, Logistics.

City Edge (Ballymount / Naas Road)

The Ballymount / Fox and Gesse / Greenhills Road area of the county is made up of diverse uses and is split between 2 zoning types: EE and Regen. Though both zoning have diverse and different use types, traditionally both areas formed a more traditional industrial use type, which can still be seen today on the ground. Looking at workplace zone data for this location, the main industry is Wholesale and Retail Trade in both the EE and Regen lands. Retail uses are the strength within the Greenhills Road, selling a variety of home / Bathroom appliance showrooms and Auto Shop / Repairs services. The EE lands, located along the M50, also have a strong mix of retail units and share similar operators with the Regen, just with more Wholesale retailers of food, building materials and transport products.

Both ‘Information and Communication, Financial’ and ‘Manufacturing, mining and quarrying’ appear throughout both EE and Regen locations. Within the Regen lands, manufacturing provides

843 jobs, for example within the Brennans Bread Factory, The Chocolate Warehouse and Galco Steel. Manufacturing is also strong within the EE lands employing 940 persons. Information and Communication, financial is identified as employing 1,503 within the EE lands.

Looking at the Geodirectory dataset, it aligns with the workplace zone data, highlighting strong performance in retail and wholesale trade, while also identifying strong performance in the professional, scientific and technical activities of our economy. The EE lands are home to a number of Engineering and Science Companies (Belton Consulting Engineers, Alternative Energy Ireland for example). The same can be seen within the Greenhills Road, with companies like Alupress and Prism engineering Limited operating from this part of the county.



On the ground much of the area is made up of diverse and indigenous SME's operating wholesale / retail units from small or large warehouse style units with associated office / showroom space where required. Though SME is a broad description given to all indigenous industry between 1-50 employees, the Ballymount / Naas Road area of the county appears to operate furniture providers, motor vehicles parts / repairs / sales, wholesale for the building sector and the fashion industry. Much of the area is well connected yet at times many of the industries appear to be located in cramped quarters which are not attractive for general visitors.

The EE lands are also home to many multinationals, with many operating out of large warehouse units above 4000sqm with many logistics' providers including DHL, Fastway and DPD operating here where there is access to the M50. Some multinationals also have small office space located in this location within fashion city or in close to this.

The valuation office data shows a total floorspace of 469,385 sqm on EE lands and 231,735 sqm on Regen lands. The top three on EE lands break down as warehouse (238,181 sqm), office (138,434 sqm) and store (50,906 sqm). The top three building types on Regen lands are warehouse, office and store.

Warehousing is the main building type within the EE and Regen lands, dominating the landscape. Warehousing operations are used by a diverse range of business types and are made up of both Indigenous SMES's and Multinational industry. SME operations in this location can range from businesses employing 2 people and up, requiring warehouse space, depending on the items they are selling. In general, smaller warehousing units' range in size from 100 – 400 sqm¹. These units

¹ Western Parkway Business Centre 120 - 180 sqm, Ballymount Cross Industrial Estate 200 – 400 sqm, Riverview Business Park 100 – 150 sqm

offer adequate storage space for wholesale or retail products and are operated by SME's and at times by international businesses.

Warehouse units operated by medium and larger industry types often account for the larger units within the area. These are largely based within the Ballymount area of the County, though there are several large warehouse units where pre-planning for residential with some mixed use has taken place (e.g. Chadwick's site). These units vary in size from 1000sqm and above². As seen in planning applications through the beginning of the current Development Plan (2022), applications for larger warehousing units on bigger sites has increased often linked to the provision of logistics-based industry.

Many Warehouse units also have a combination of units including office and showroom space, especially in Greenhills where retail providers of larger goods have showrooms.

Office space is provided either in combination with Warehouse / Showroom units or on its own. Where office units exist on their own, they are usually provided in two storey units ranging in size from 100 – 250 sqm within Ballymount. These units offer flexibility to users who may also sell products elsewhere within this area or operate on a global scale. Office units of this size and scale can be found throughout both the EE and REGEN lands found in this study and include locations like Ballymount Corporate Park, Riverview Business Park, and parts of Western Parkway Business Park. These units can accommodate both indigenous and multinational companies and provide access to the M50 and City Centre from a variety of transport modes.

Vacancy: As of January 2024, this was relatively low although there were a number of units for lease, at time of site visit this comprised almost 50:50 office and warehouse units. There were approximately 9 units for sale comprising warehouse/office, commercial site and investment properties.

Clustering: Wholesale, Retail Trade

² Fastway Couriers Ballymount 4244 sqm, DPD Ireland Depot 6735 sqm, DHL Supply Chain Fox and Gesse, >10000sqm