



MITCHELL MCDERMOTT

OPR BROWNFIELD LAND ACTIVATION

2nd May 2025



Agenda

1. STUDY BACKGROUND

2. CASE STUDIES

3. INTERVIEWS

4. COST COMPARISON

5. FINDINGS

COMPANY INFORMATION

OUR CREDENTIALS

85 Personnel

DIRECTORS

Paul Mitchell
Anthony McDermott
Ronan Tynan

SERVICES

Quantity Surveying

Project Management

Bank Monitoring

Pre-Acquisition Technical Due
Diligence

Recovery

Financial Modelling

Expert Witness

Feasibility Studies

SECTORS

Residential

Hotels

Offices (New Build & Fit Out)

Healthcare

Student Accommodation

Retail (Development & Fit Out)

Data Centres

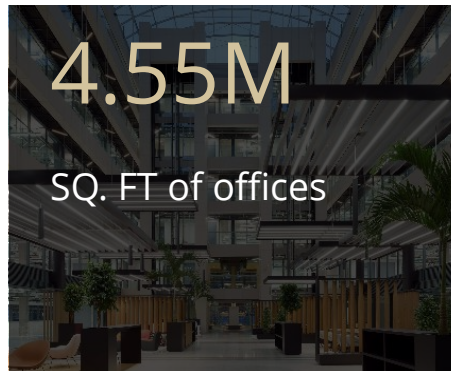
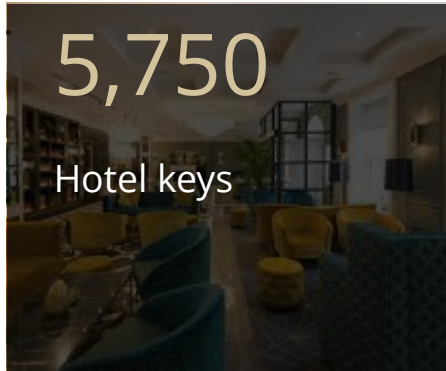
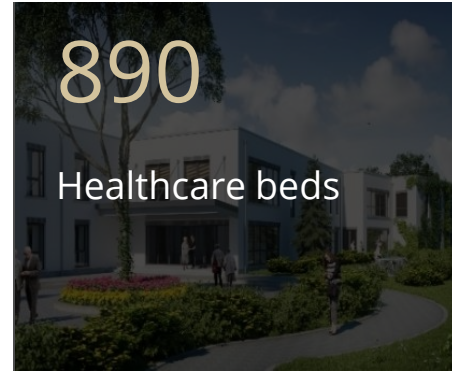
Infrastructure

Culture (Arts, Entertainment)

Third Level Education

Pharmaceuticals

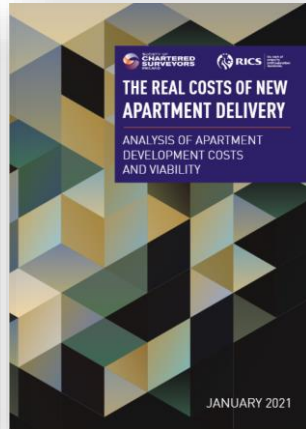
CURRENT AND DELIVERED PROJECTS



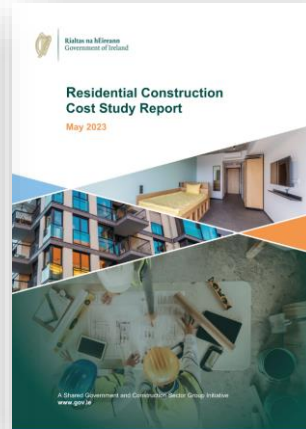
RESEARCH



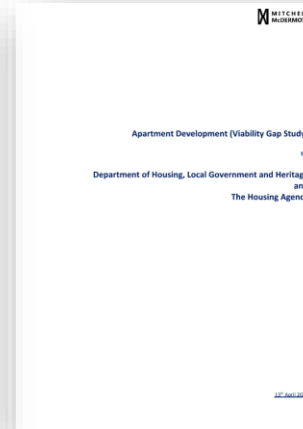
The Real Cost of New Apartment Delivery 2017- SCSi



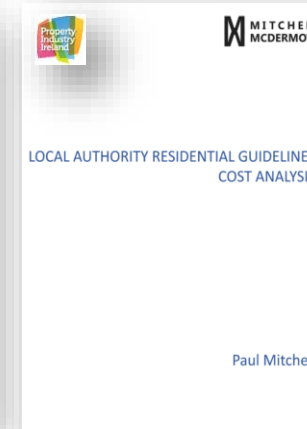
The Real Cost of New Apartment Delivery 2021- SCSi



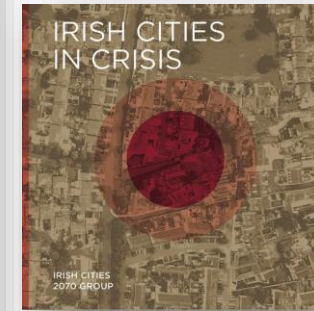
Residential Construction Cost Study Report- DOH



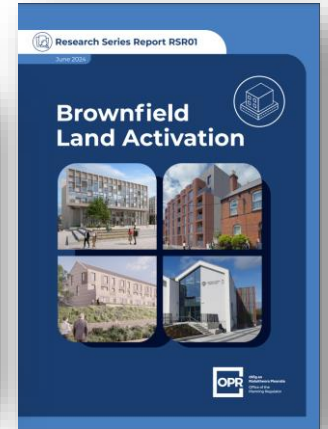
Apartment Development Viability Gap Study -DOH



Residential Guidelines Cost Analysis - PII



IC70 Cities in Crisis – RIAI/DHLGH



Brownfield/Greenfield Study - OPR



The Housing Commission Cost of Urban Sprawl - HC



The Housing Commission Compact Housing Viability- HC



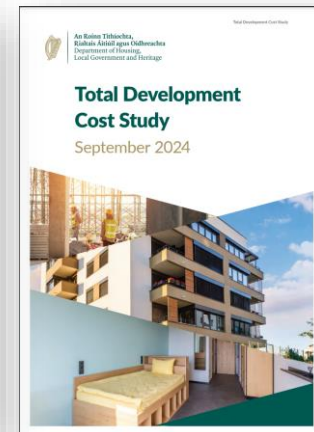
The Housing Commission Residential Viability - HC



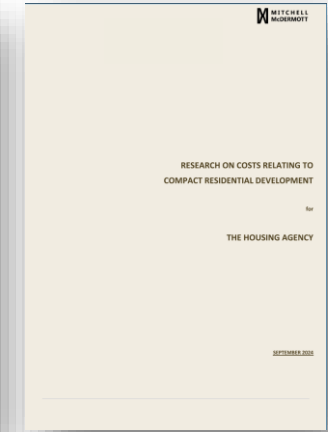
Dublin Council Contributions –DCC*



SME's in the Irish Construction Industry –EI*

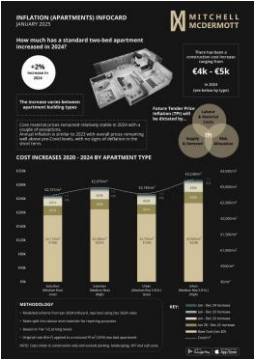


Total Development Cost Study-DOH

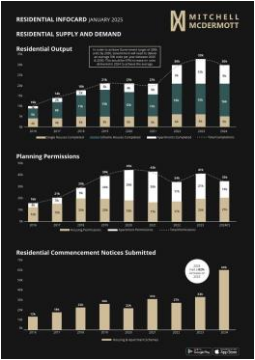


Compact Growth Study - DOH / HA

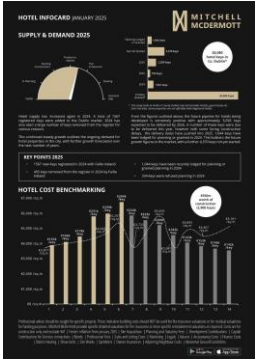
MITCHELL MCDERMOTT 2025 INFOCARDS



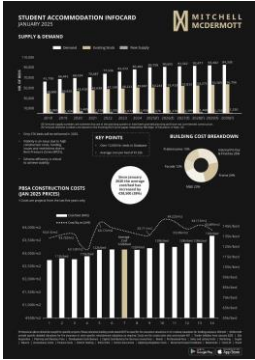
APARTMENTS
INFLATION



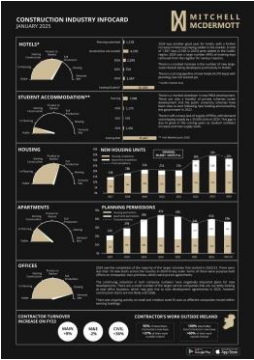
RESIDENTIAL



HOTELS



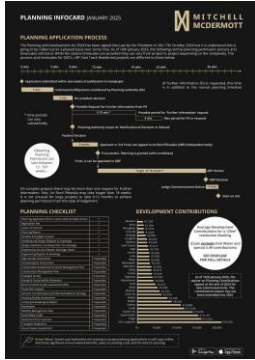
STUDENT



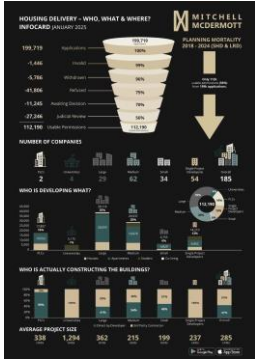
MARKET



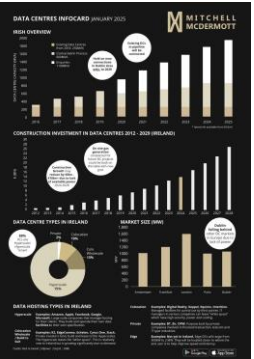
PROGRAMME



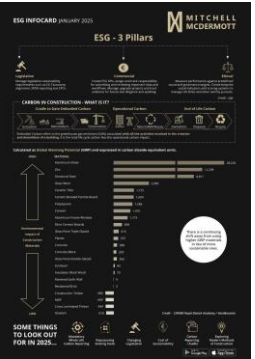
PLANNING



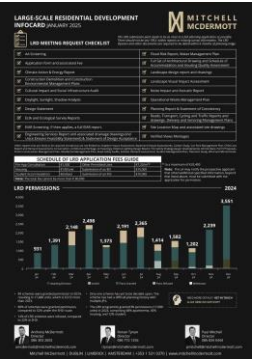
HOUSING DELIVERY



DATA CENTRES



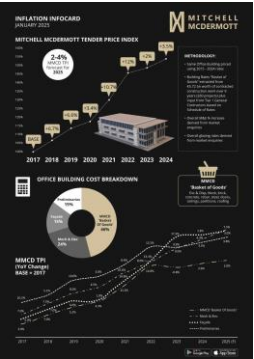
ESG



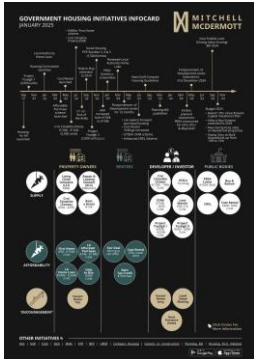
LRD



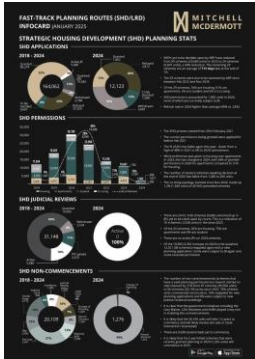
APARTMENT REGS



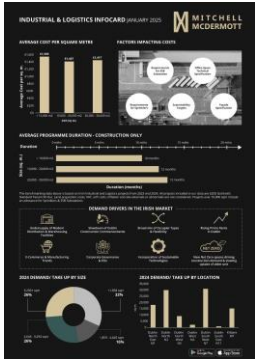
INFLATION



HOUSING INITIATIVES



FAST TRACK PLANNING



INDUSTRIAL & LOGISTICS

STUDY BACKGROUND



STUDY BACKGROUND

- Compact growth is a strategic outcome of the NPF
- Assist in the transition to a low carbon society (also strategic outcome)
- Target of 40% new housing to be delivered within infill / brownfield lands
- Planned development to accommodate growing population
- Activating brownfield sites will help move away from urban sprawl
- Redeveloping brownfield sites is a complex area

STUDY BACKGROUND



- Create an **evidence base** of the key drivers and enablers
- Identify the **challenges** and **obstacles**
- Identify **best practices** from lessons learned in **case studies** to inform policy

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What is a brownfield site?

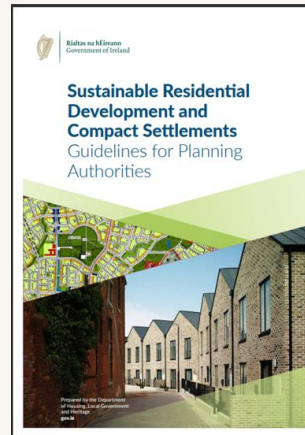


What is a brownfield site?



In some jurisdictions, 'Brownfield Lands' are defined based on the existence of contamination

- Abandoned sites
- Infill sites
- Vacant & derelict properties
- Partially complete structures
- Redundant lands / buildings
- Obsolete buildings

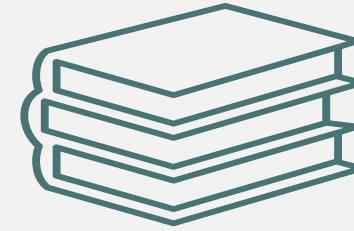


"...any land which has been subjected to building, engineering or other operations, excluding temporary uses or urban green spaces", generally comprise redundant industrial lands or docks but may also include former barracks, hospitals or even occasionally, obsolete housing areas..."

Guidelines for Planning Authorities on Sustainable Residential Development (2024)

APPROACH & METHODOLOGY

- Qualitative research with a combination of case studies and interviews
- Literature review
- Cost comparison
- Study limitations – qualitative methodology
 - Small sample of interviews and case studies
 - Potential bias and subjectivity



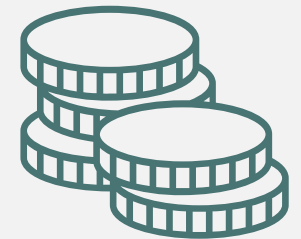
Literature Review



Case Study Analysis




Expert Interviews

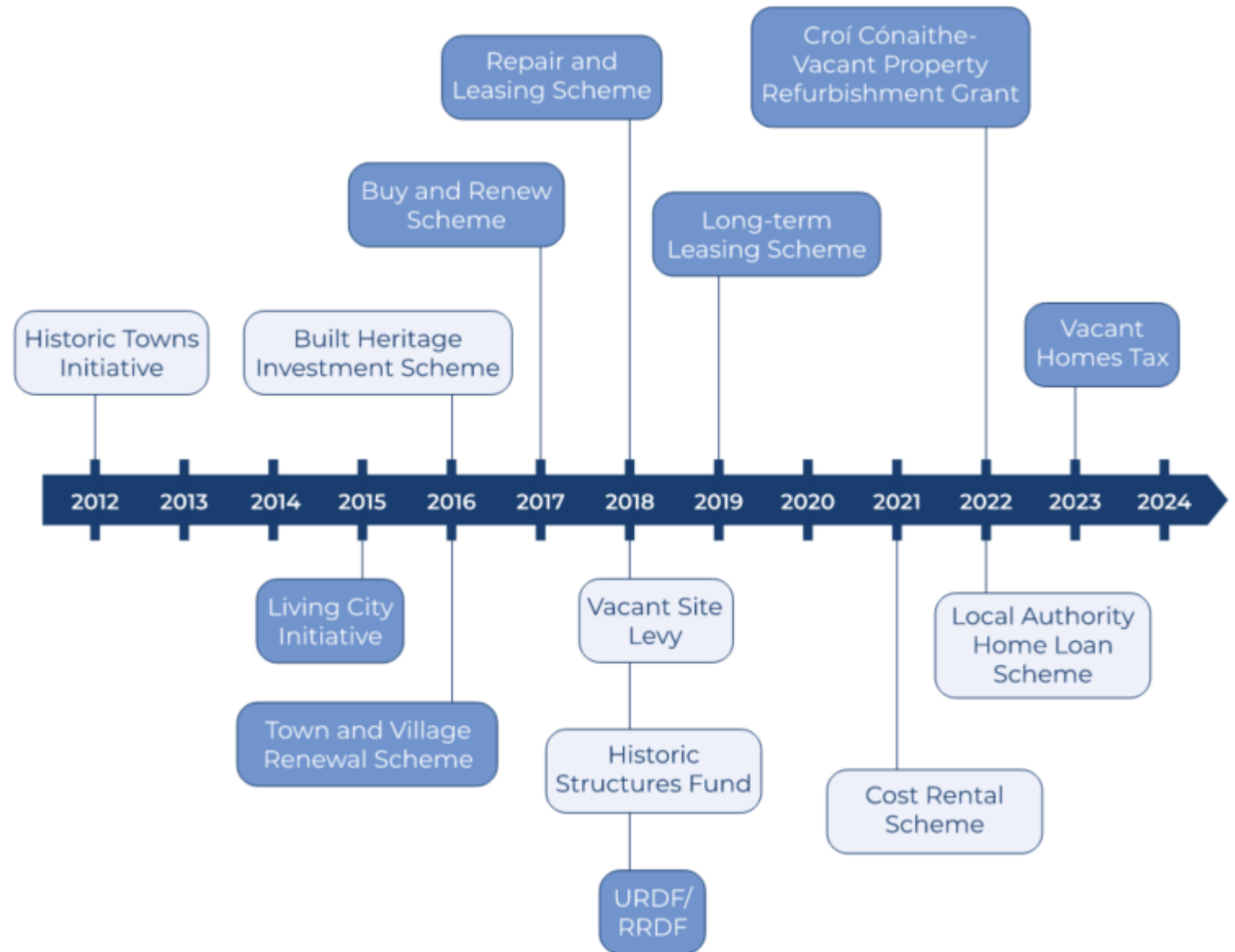


Cost Comparison

STATE INTERVENTIONS (2012 – 2023)

 Initiatives applicable to brownfield only

 Initiatives applicable to brownfield & others



CASE STUDIES

An aerial night-time architectural rendering of a modern urban development. The central focus is a large, multi-story building with a prominent glass facade that reveals interior spaces and is illuminated from within. This building is part of a larger complex that includes several other multi-story structures, some with rooftop gardens. The scene is set in a city at night, with a dark sky and distant city lights visible on the horizon. In the foreground, there are streets with cars, pedestrian sidewalks, and small landscaped areas with trees. The overall atmosphere is one of a vibrant, modern city environment.

BROWNFIELD TYPOLOGIES

Typologies used for the purposes of this research.



Type 1 – Empty Site

Vacant site that had a previous use / structure on it and has been left blank with remains from its previous use.



Type 2 – Vacant building

Existing vacant property including variety of uses including above the shop residential.



Type 3 – Derelict Sites

Existing vacant dwellings which have become derelict and structurally unstable and are unsafe.



Type 4 – Conversions

Existing building with opportunity to repurpose or convert to alternative use.

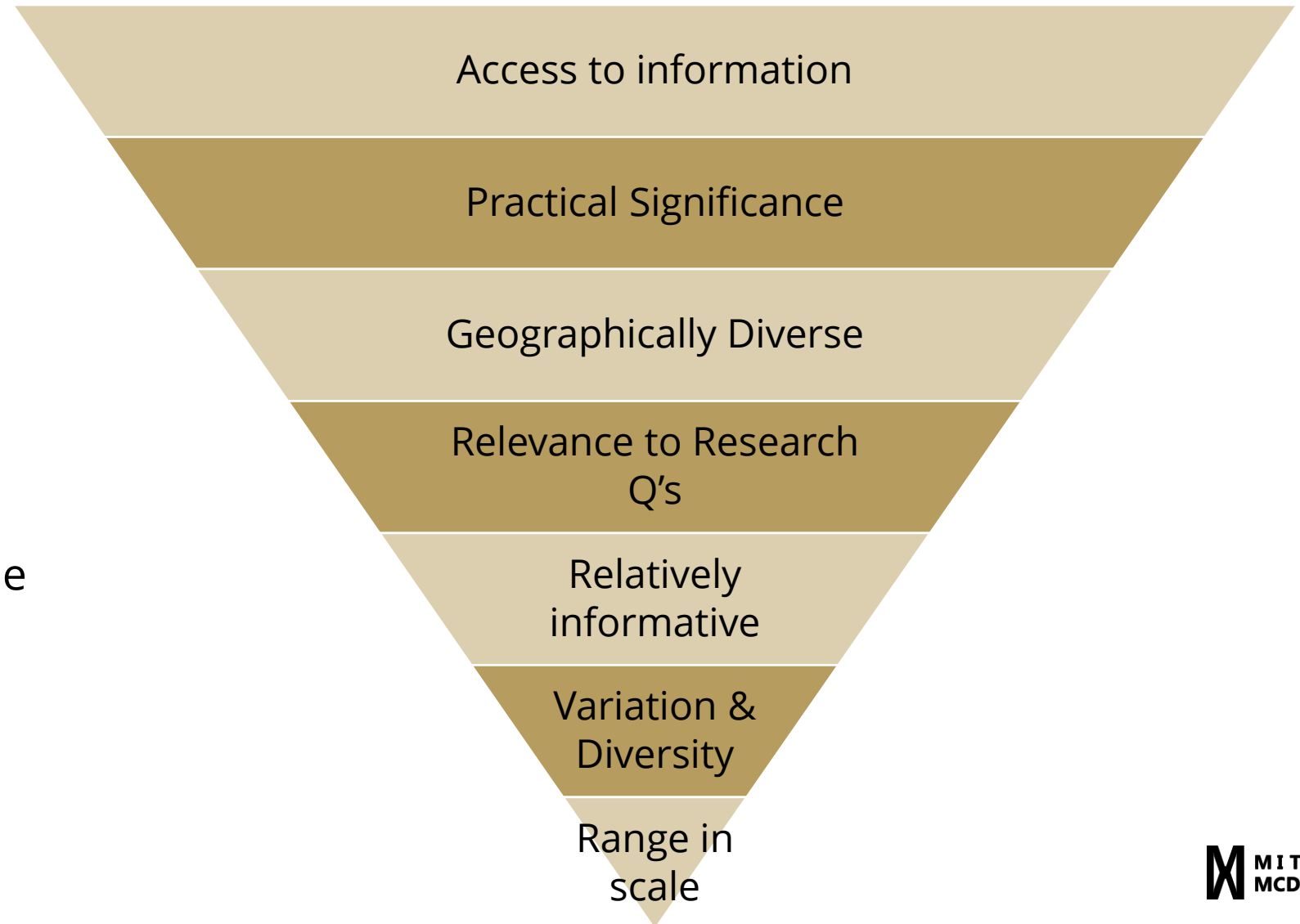
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Case study selection?







CASE STUDY SELECTION





- Initial long list
- Filtering process
- 4 case studies selected
- Diverse in type and scale



CASE STUDIES

Typology	Project	Sponsor / Developer	Status	Images
Type 1	Emmet Road Redevelopment, Dublin	Dublin City Council	EW on Site MW at Tender	 
Type 2	15 Richmond Avenue, Dublin	Focus Ireland	On Site	 

CASE STUDIES

Typology	Project	Sponsor / Developer	Status	Images
Type 3	St. Kevin's Redevelopment, Cork	Land Development Agency	On Site	 
Type 4	City Library - Mayfair Hall, Kilkenny	Kilkenny County Council	Complete	 

CASE STUDY ANALYSIS

- Information gathered under three main headings:
 - Legal & Regulatory
 - Economic & Financial
 - Social & Cultural
- Identify main constraints and level of impact on each project

Case Study 1 - Emmet Road Development

Site Characteristics	Type of site:	Brownfield/Urban regeneration.
	Site area (hectares):	4.6 hectares including Uisce Éireann watermain upgrade (3.8 hectares excluding Uisce Éireann mains).
	Brief description of existing site condition:	There is a mixture of single storey existing buildings, existing hard landscaped areas and existing brownfield space. The site was the location of the former St. Michael's Estate (Dublin City Council social housing accommodation) to the south, now demolished. Existing social and community facilities to the north of the site were/are to be demolished. The site is generally flat with no major level changes.
	Brief description of existing structures (if applicable):	Historic stone boundary wall to north and northwest perimeter to be partially removed and re-built. Community centre- to be demolished. Health Service Executive (HSE) Health Centre- to be demolished. Existing sports community building- to be retained.
	Are any existing structures retained?	Historic stone boundary wall along the north and north-west perimeter is a protected structure to be retained and the existing sports community building will also be retained.
	Site constraints (other than noted above):	Richmond Barracks to the east of the site is a protected structure not to be impacted by the project. Goldenbridge Cemetery to the south of the site.
	Site abnormalities (other than noted above):	Extensive soil contamination on the site. Off site public watermain upgrade, circa 200m.
	Any built or natural heritage elements?	Heritage stone wall noted above.
	Any other notes on the site condition?	None.

EMMET ROAD

- Large urban brownfield site
- Contamination
- Heritage walls / Protected structure
- Off site infrastructure upgrades
- Idle for circa 20 years
- Viability challenge

DEVELOPMENT OVERVIEW

Location	Inchicore, Dublin
Type	Brownfield / Urban Regeneration
Site Area	4.6 hectares
Key Features	Historic Wall Contaminated soil Existing buildings Infrastructure upgrades
Proposed Dev.	578 apartment with community facilities

- Positive impact – new public amenities
- Community engagement
- Delivered by LA - Dev Contributions n/a
- Benefits from AHF funding (Cost Rental scheme)
- Stimulus to local area

INTERVIEWS

An aerial night photograph of a modern, multi-story glass skyscraper in a city. The building's interior lights are on, and its glass facade reflects the surrounding city lights. The building is situated on a street corner, with a curved road and a pedestrian walkway visible. In the background, other city buildings and a distant bridge are visible under a dark, cloudy sky. The word "INTERVIEWS" is overlaid in white, sans-serif capital letters across the center of the image.

PRIMARY RESEARCH CONTEXT



2H 2023
Primary Research



Q2 2024
Published

2023

2024

2025

- ABP Backlog
- Staffing
- Timelines

- Backlog being addressed
- Increase in resources
- Planning Act

- Backlog reduced
- Act Implementation
- NPF

INTERVIEWS

- 12 interviews conducted overall
- Conducted between October & November 2023
- Semi-structured format
- Findings grouped into headings:
 - *Non-physical Challenges*
 - *Physical Challenges*
 - *Barriers to Development*
 - *Suggested solutions*

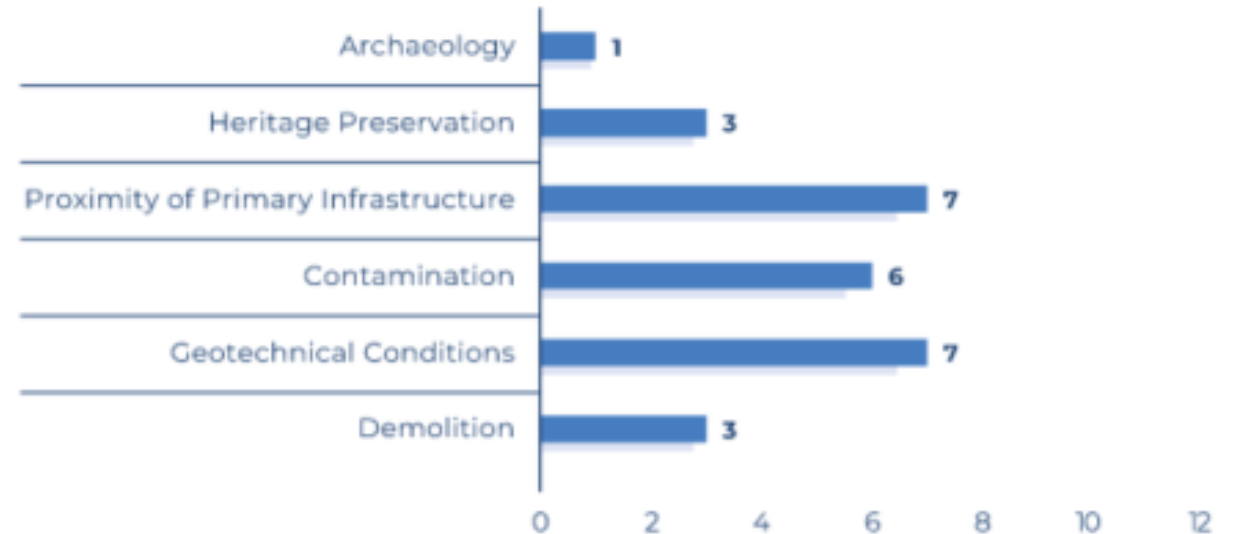
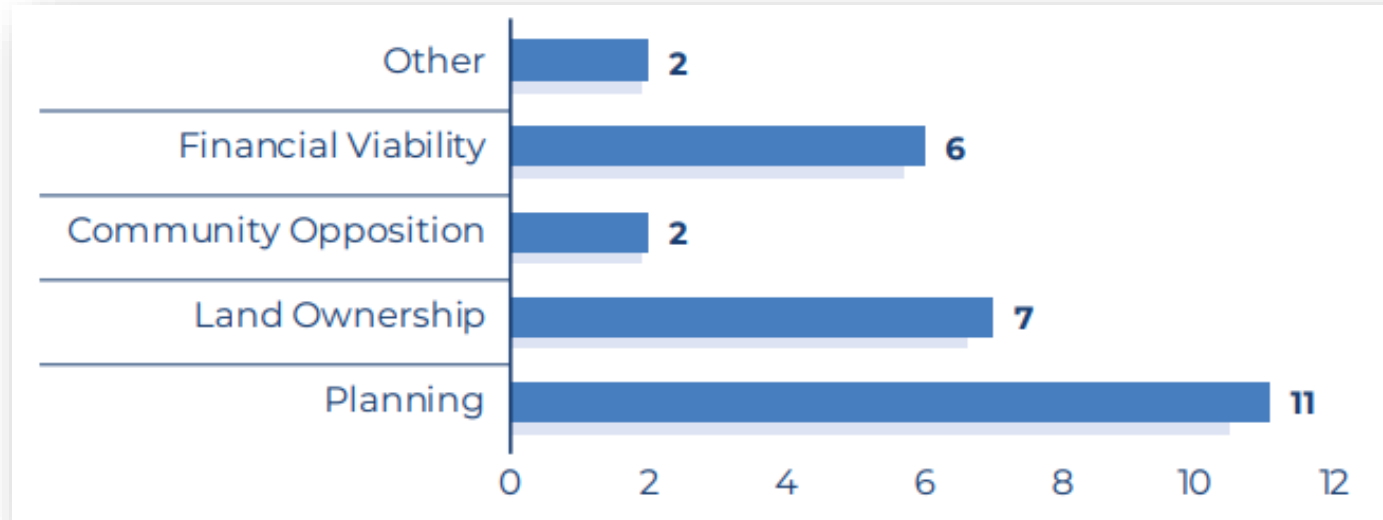


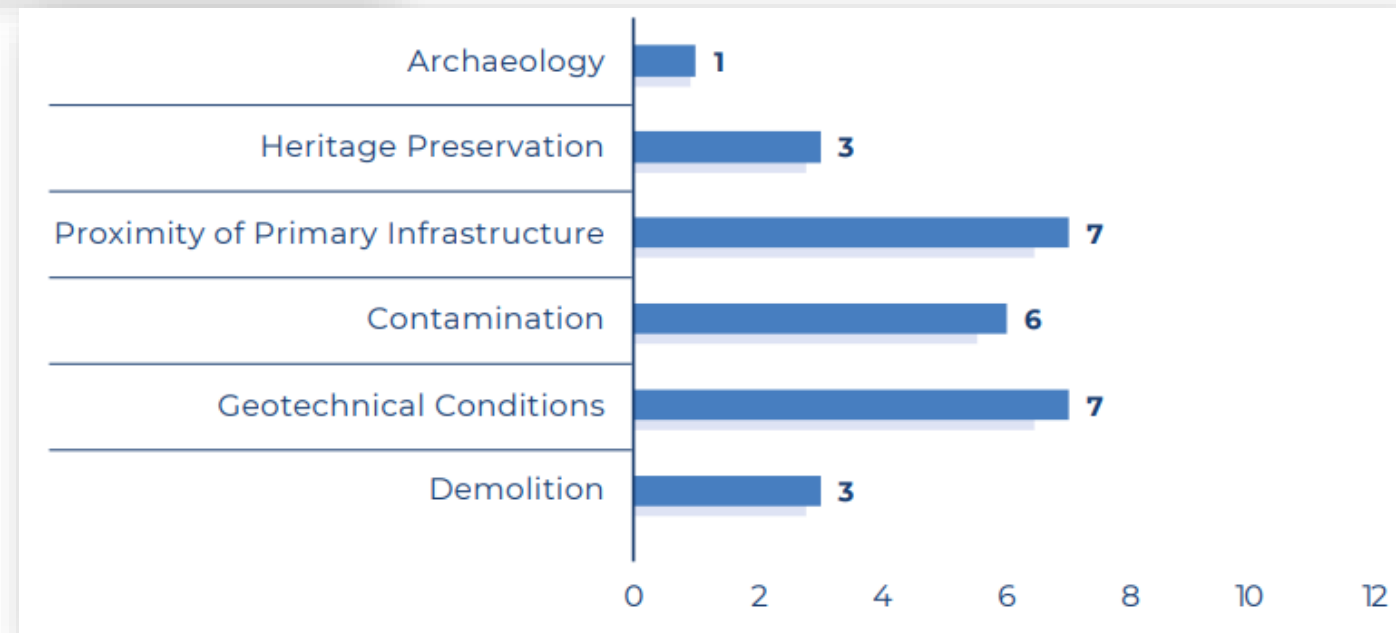
Figure 10: Physical Challenges Identified by Interviewees.

INTERVIEWS

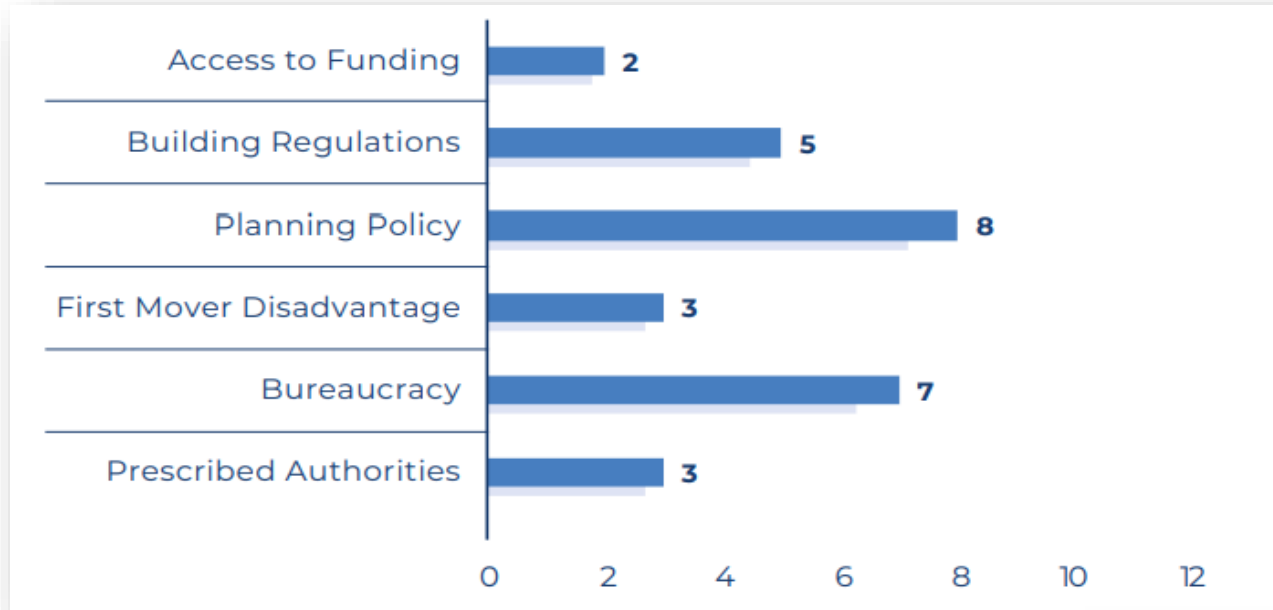


Non-Physical Challenges

Physical Challenges

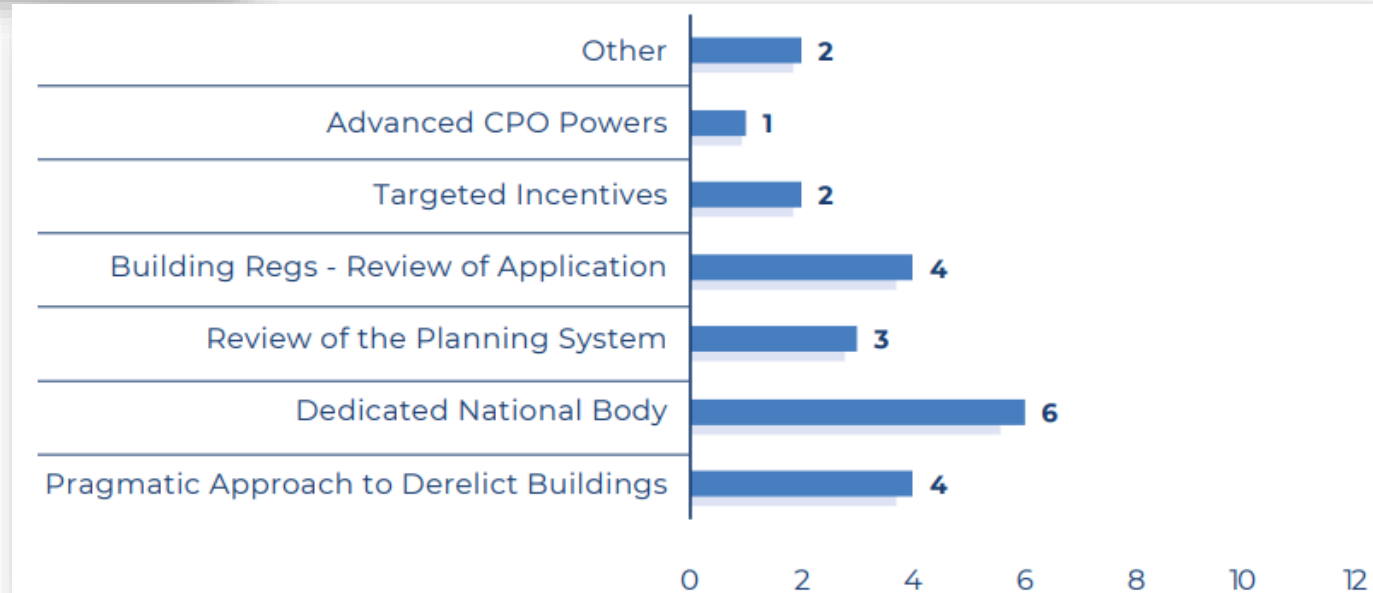


INTERVIEWS



Barriers to Re-Development

Suggested Solutions



INTERVIEW FINDINGS

- Planning on broader context identified as barrier
- Financial challenges – viability!
- Time / Cost impact of abnormals
- No single solution
- Series of targeted interventions required
- Central dedicated body

COST COMPARISON

An aerial night-time architectural rendering of a modern multi-story building complex. The building features large glass facades and balconies, with interior lights glowing through the windows. The complex is situated in an urban environment, with a city skyline visible in the background under a dark, cloudy sky. The foreground shows a street with cars and pedestrians, and a small landscaped area with trees and a fountain. The text "COST COMPARISON" is overlaid in the center of the image.

“



Is there a cost difference
for developing on a
brownfield site vs.
greenfield site?

COST COMPARISON

- Development costs for an **actual project** on a brownfield site
 - Existing structures
 - Asbestos
 - Boundary wall issues
 - Contamination
- Residential project with c. 110 units
- A **hypothetical greenfield site** for the same development



COST COMPARISON - SCENARIO

Additional cost range of €58,000 to €77,000 per residential unit to build the same apartment block on a brownfield site

Figure are site specific and should not be used for comparison / benchmarking

WHAT IS THE ADDITIONAL CAPITAL COST OF DEVELOPING ON A BROWNFIELD SITE VS. GREENFIELD SITE?			
DEVELOPMENT COST CATEGORIES	ADDITIONAL CAPEX COST RANGE	BROWNFIELD	GREENFIELD
Site Costs	€8k/unit - €11k/unit	Site costs for urban locations tend to be higher due to location and proximity to services	Greenfield sites, albeit potentially more attractive, tend to have lower land values compared to urban brownfield sites.
Hard Costs - Site Abnormals	€9k/unit - €12k/unit	Existing buildings (car dealership, garage and filling station) to be demolished. Underground tanks and associated structure to be broken out. Asbestos materials in the existing buildings fabric. Contamination in the existing ground which is a cost uplift to dispose. Bounday walls which require a combination of re-building and re-pointing	Greenfield site - no works. Site clearance / preparation included in construction costs.
Hard Costs - Construction Costs	€28k/unit - €37k/unit	Including apartment and proportional cost for parking and site works. Typically there is a premium for building in urban locations over greenfield sites due to constraints around site access, logistics, proximity of neighbouring properties.	Including apartment and proportional cost for parking and site works.
Soft Costs	€13k/unit - €17k/unit	Including statutory fees and contributions, professional fees, sales & marketing costs, finance and contingency. Majority of these costs are linked to the hard costs.	Including statutory fees and contributions, professional fees, sales & marketing costs, finance and contingency. Majority of these costs are linked to the hard costs.
TOTAL	€58k/unit - €77k/unit	Overall cost uplift range for brownfield vs. greenfield based on an actual brownfield site and hypothetical greenfield.	
EXCLUSIONS		The costs exclude the indirect costs of urban sprawl. See details below	

WHAT ABOUT INDIRECT COSTS?

- **Hard infrastructure**
 - Roads
 - Rail
 - Utilities (water, power, gas, drainage, etc.)
- **Social Infrastructure**
 - Bus routes
 - Schools
 - Hospitals
 - Public administration
 - Community buildings
 - Parks
- **Environmental impact**
- **Sustainability**

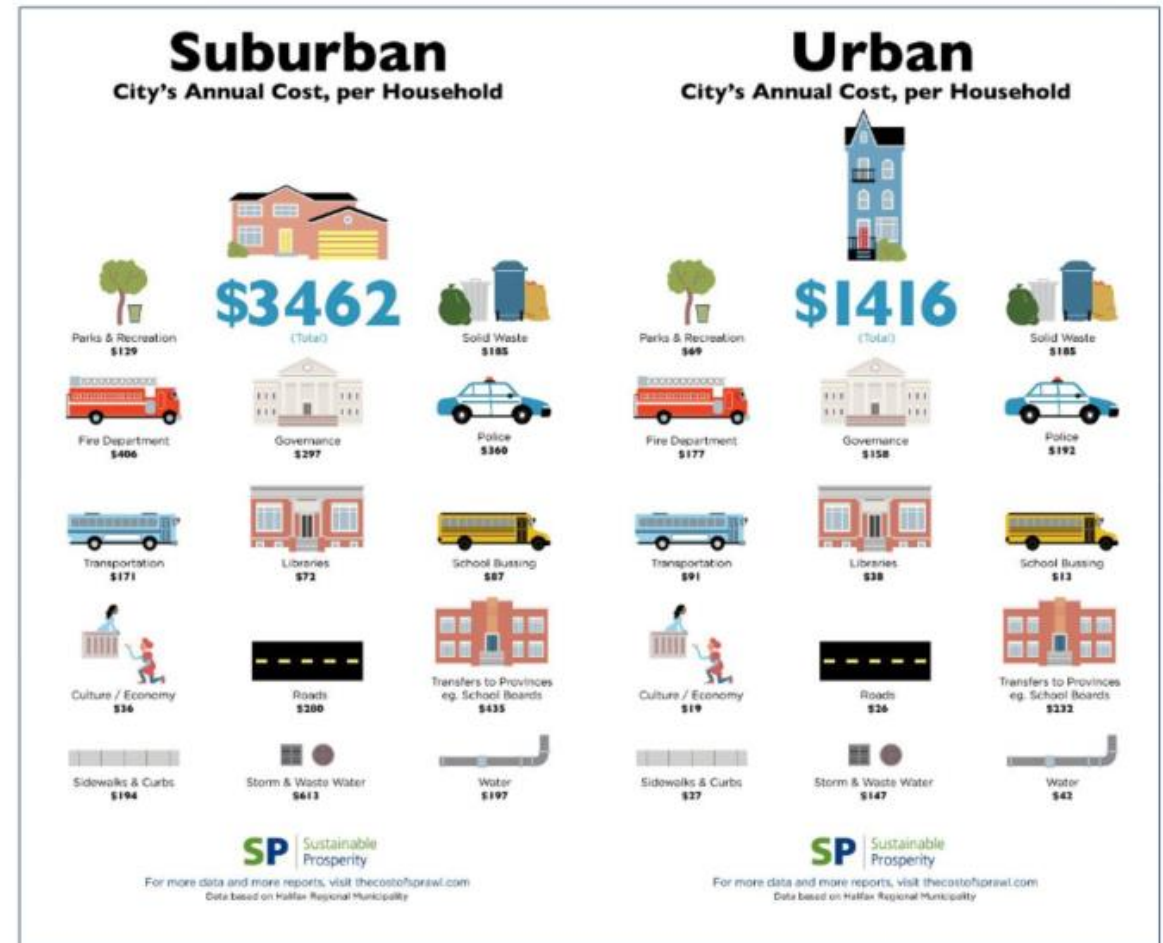
WHAT ABOUT INDIRECT COSTS?

- Indirect costs
- Cost of urban sprawl
- Infrastructure
- Environmental impact
- Sustainability



**HC report estimated
€102,000 to €137,000 per
home based on
hypothetical scenario**

**Public Cost of Maintaining Suburban
Household vs Urban = 244% higher**



FINDINGS

An aerial night-time architectural rendering of a modern urban development. The central focus is a large, multi-story building with a prominent glass facade, illuminated from within, showing interior spaces and people. To its left is another similar building, and to its right is a taller building with a distinctive curved, illuminated top. The scene includes a multi-lane road with cars, a pedestrian walkway with trees and streetlights, and a distant city skyline under a dark, cloudy sky. The word "FINDINGS" is overlaid in large, white, sans-serif capital letters across the center of the image.

FINDINGS

- The presence of brownfield sites is **not unique** to Ireland
- Brownfield redevelopment is **slow and complex** with many risks
- Development on **greenfield will continue** at pace as long as it remains more attractive
- A lot of **initiatives** already exist – but are they **targeted enough**?!
- **Cost vs. value gap** remains a problem for many sites
- Application of **building regulations** to existing buildings continues to prove challenging
- Desire for **centralized ownership** and overall strategy for small, medium and large sites
- ‘Value’ of redevelopment needs to go **beyond initial investment**
- **Canada** is a good international example to reference

POTENTIAL PATHWAY

1. Leadership & Vision
2. Identify
3. Evaluate & Categorise
4. Register & Assign
5. Consultation, Planning & Design
6. Implementation
7. Site Activation
8. Maintain Register & Monitor Activation





Eoin McEnery MRICS / MSCSI

Divisional Director

THANK YOU!



MITCHELL MCDERMOTT

OPR BROWNFIELD LAND ACTIVATION

02nd May 2025