

Student Accommodation Concentration Report

**For a Large-Scale Residential
Development
(Purpose-Built Student Accommodation
Scheme)**

**Lands at the former “Matt’s of Cabra”
Public House, 2A Fassaugh Avenue,
Dublin 7
D07 TH77**

On behalf of

**R & D Developments Limited
(in Receivership)**



January 2026



**Brock
McClure**

PLANNING & DEVELOPMENT CONSULTANTS

63 York Road,
Dun Laoghaire
Co. Dublin

www.brockmcclure.ie



Table of Contents

1	Introduction	2
1.1	Methodology.....	2
2	Subject Site.....	3
2.1	Proximity to Third Level Institutions	4
2.2	Public Transport Accessibility	6
2.3	Surrounding Context.....	13
3	Proposed Development	16
4	Policy Context	18
4.1	National Planning Framework: Project Ireland 2040	18
4.2	National Student Accommodation Strategy (2017)	18
4.3	Design Guide for State Sponsored Student Accommodation	19
4.4	Planning Design Standards for Apartments Guidelines for Planning Authorities, 2025 .	19
4.5	Dublin City Development Plan 2022-2028.....	20
5	Student Accommodation Market Analysis	21
5.1	Ireland Student Accommodation Review 2024 – Cushman & Wakefield	21
5.2	PBSA Market Outlook 2024 - Lisney.....	22
5.3	Ireland Living Sectors Market 2024 – Knight Frank.....	22
5.4	Report on Student Accommodation Supply and Demand	22
6	Student Demographics.....	24
7	Student Accommodation in the Area.....	27
8	Conclusion	29





1 Introduction

We, Brock McClure Planning & Development Consultants, 63 York Road, Dún Laoghaire, Co. Dublin are instructed by our client, **R & D Developments Limited (in Receivership), Grant Thornton, 13-18 City Quay, Dublin 2, D02 ED70** to prepare this Student Accommodation Concentration Report to support a Large-Scale Residential Development application for a purpose-built student accommodation scheme on lands at the **former “Matt’s of Cabra” public house, 2A Fassaugh Avenue, Dublin 7, D07 TH77.**

This Student Accommodation Justification Report is lodged as an accompanying report for the subject proposal and should be read in conjunction with all plans and particulars submitted as part of the overall application.

The purpose of this Report is to provide an assessment of concentration of student accommodation in the area surrounding the application site, with a particular focus on a 1 kilometre radius from the subject site.

This Report has been prepared to show compliance with Section 15.13.1 of the Dublin City Development Plan 2022-2028 which states that:

“In assessing the degree of the concentration of student accommodation, the Council will take into account the nature of the locality in terms of mix of land use and housing types, the existing and proposed number of students in the locality. To assist in this assessment the applicant will be requested to submit evidence of existing, proposed and under construction student accommodation developments within an area, including a map showing all such facilities within 1km of a proposal.”

1.1 Methodology

The purpose of this report is to provide a comprehensive analysis to demonstrate that there is not an overconcentration of student accommodation within the surrounding area. This assessment will specifically focus on a 1 km radius (Study Area) from the subject site, as specified in Section 15.13.1 of the City Development Plan.

To carry out this review, the following aspects have been examined:

- **Statutory Planning Context:** An analysis of the relevant planning policies and objectives related to tourist accommodation.
- **Supporting Infrastructure:** location of existing 3rd level institutions; location of social infrastructure; location of public parks and convenience retail.
- **Student Data Review:** Analysis of statistics and data concerning the student population in the Study Area and wider Dublin Area.
- **Concentration of Existing Student Accommodation:** An evaluation of the current number of student accommodation bedspaces in the Study Area.
- **Assessment of Live / Recently Permitted Student Accommodation:** An examination of live or recently permitted planning applications for student accommodation that have not yet been constructed within the Study Area.

We would like to set out from the outset that this report has been compiled as a desktop-based study based on the information available at the time of writing.



2 Subject Site

The subject site is located at 2A Fassagh Avenue, Dublin 7, D07 TH77 and measures approx. 0.54 ha. The site itself is a vacant plot in a well-connected location in Cabra.

The site currently occupies the now vacant 1-2 storey structures fronting onto Fassagh Avenue with an informal parking area to the front. The site was formerly known as ‘Matt’s of Cabra’, public house. Beyond the structures, the subject site is long and narrow and overgrown and greenfield in nature. There are limited views into the site from the public domain.



Figure 1 - Aerial Map with Subject Site outlined in Red



Figure 2 – Streetview from Fassagh Avenue with Subject Site outlined in Red

The subject site and existing buildings are contained within Dublin City Council's Vacant Sites Register, having entered the register on 26 August 2019 (Ref. VS-0453). We note that the existing buildings are

of no architectural merit and are not on the list of Protected Structures. These structures are proposed to be demolished as part of the proposed development.

The site is bounded to the east by the rear of two-storey houses which front onto St. Attracta's Road; to the southeast by Lanigans Funeral Home which also fronts onto Fassagh Avenue with a parking area to the front; to the west by Iarnród Éireann railway line which at a lower level than the site and beyond which are the rear of two storey houses on Bannow Road. The ground levels to the rear of the site are at a higher level relative to the properties to the east and the railway line to the west, due to the presence of spoil, which in some cases is up to the top of the boundary walls of dwellings backing onto the site to the east.

Opposite the site, on the southern side of Fassagh Avenue, is a GAA club and grounds, a Gaelscoil and a Health Centre. There are local neighbourhood centre shops approx. 200m west. Mount Bernard Park is approx. 400 m to the east and the Royal Canal corridor is 300m to the north.

2.1 Proximity to Third Level Institutions

As shown in figure 3 and table 1 below, it is clear that 3rd level institutions are widely dispersed in the city. This further supports the Development Plans acknowledgment of the demand for purpose built student accommodation in the city.



Figure 3 – 3rd Level Institutions relative to the subject site

No.	3 rd Level Institution	Walking Distance from Site
1.	TU Dublin Grangegorman	1.8 km
2.	Teagasc College of Amenity Horticulture	2.4 km
3.	Whitehall College of Further Education	2.6 km



No.	3 rd Level Institution	Walking Distance from Site
4.	Dorset College – Main Campus	2.6 km
5.	IBAT College Dublin (Frederick Street North)	2.6 km
6.	Portobello Institute	2.7 km
7.	TU Dublin Bolton Street	2.7 km
8.	Dublin College of Advanced Studies Ltd.	2.8 km
9.	National Learning Network – Roslyn Park College	3 km
10.	Griffith College Dublin City Centre Campus	3 km
11.	Cathal Brugha FET	3.1 km
12.	National College of Art and Design	3.2 km
13.	Cathal Brugha FET, North Strand Campus	3.5 km
14.	IBAT College (Wellington Street)	3.5 km
15.	City North College of Further Education	3.5 km
16.	Independent College	3.6 km
17.	DCU St. Patrick's Campus	3.6 km
18.	Trinity College Dublin	3.7 km
19.	CCT College Dublin	3.8 km
20.	Centre for Academic Practice	3.8 km
21.	City Colleges	3.8 km
22.	Liberties College	3.8 km
23.	Progressive College	3.8 km
24.	Dublin Business School	4.1 km
25.	Inchicore College of Further Education	4.2 km
26.	TU Dublin Aungier Street	4.3 km
27.	National College of Ireland	4.3 km
28.	Royal College of Surgeons in Ireland	4.4 km
29.	Plunkett College of Further Education	4.5 km
30.	Royal Irish Academy of Music	4.5 km
31.	Irish American University	4.5 km



No.	3 rd Level Institution	Walking Distance from Site
32.	Marino College	4.5 km
33.	The Open University	4.8 km
34.	The National University of Ireland	4.9 km
35.	Dublin City University	4.9 km
36.	Marino Institute of Education	5 km

Table 1 - List of 3rd Level Colleges & Institutions in proximity to the Subject Site

2.2 Public Transport Accessibility

The subject site is well-located in terms of public transport accessibility.

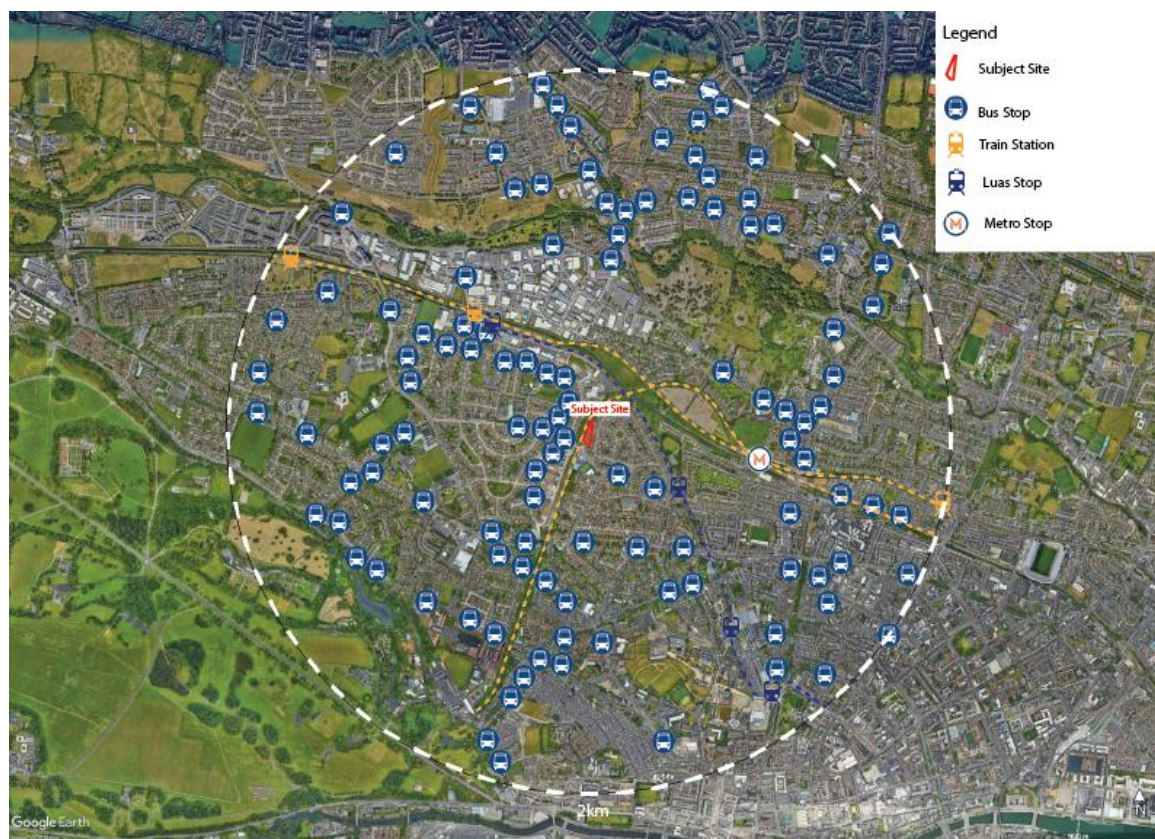


Figure 4 - Public Transport Context Map within 2 km radius of Subject Site

Local Bus Network

The closest bus stop is located directly opposite the subject site and another bus stop sits approx. 100 m / 1-minute walk from the subject site. Both stops are served by the 120 Dublin Bus route.

Bus No.	Bus Route	Peak Frequency
Naomh Fionbarra GAA, Stop 4485 (directly across the subject site)		
120	Parnell Street – Ashtown Rail Station	10 mins
Drumcliffe Drive, Stop 4371 (approx. 250 m from subject site)		
122	Ashington – Drimnagh Road	15 mins
Quarry Road, Stop 77 (approx. 650 m from subject site)		
38	Burlington Road – Damastown	20 mins
38a	Burlington Road – Damastown	20 mins



38b	Burlington Road – Damastown	20 mins
38D	Burlington Road – Damastown	Single Departure
122	Ashington – Drimnagh Road	15 mins
Old Cabra Road, Stop 1906 (approx. 1 km from subject site)		
39	Burlington Road - Ongar	10 mins
39A	UCD Belfield - Ongar	5 mins
39X	Burlington Road - Ongar	2 daily departures
70	Burlington Road - Dunboyne	30 mins
Nephin Road, Stop 4498 (approx. 1 km from subject site)		
70d	DCU - Dunboyne	Single Departure
122	Ashington – Drimnagh Road	15 mins
N2	Heuston Station - Clontarf	15 mins

Table 1 - Local Bus Routes and Frequency

BusConnects

We note to the Planning Authority that the local bus routes are subject to change due to the ongoing BusConnects programme to improve bus services in Dublin and other Irish cities. The Dublin Bus network is undergoing a phased redesign of its services and routes. The proposed network can be seen in the figure below.

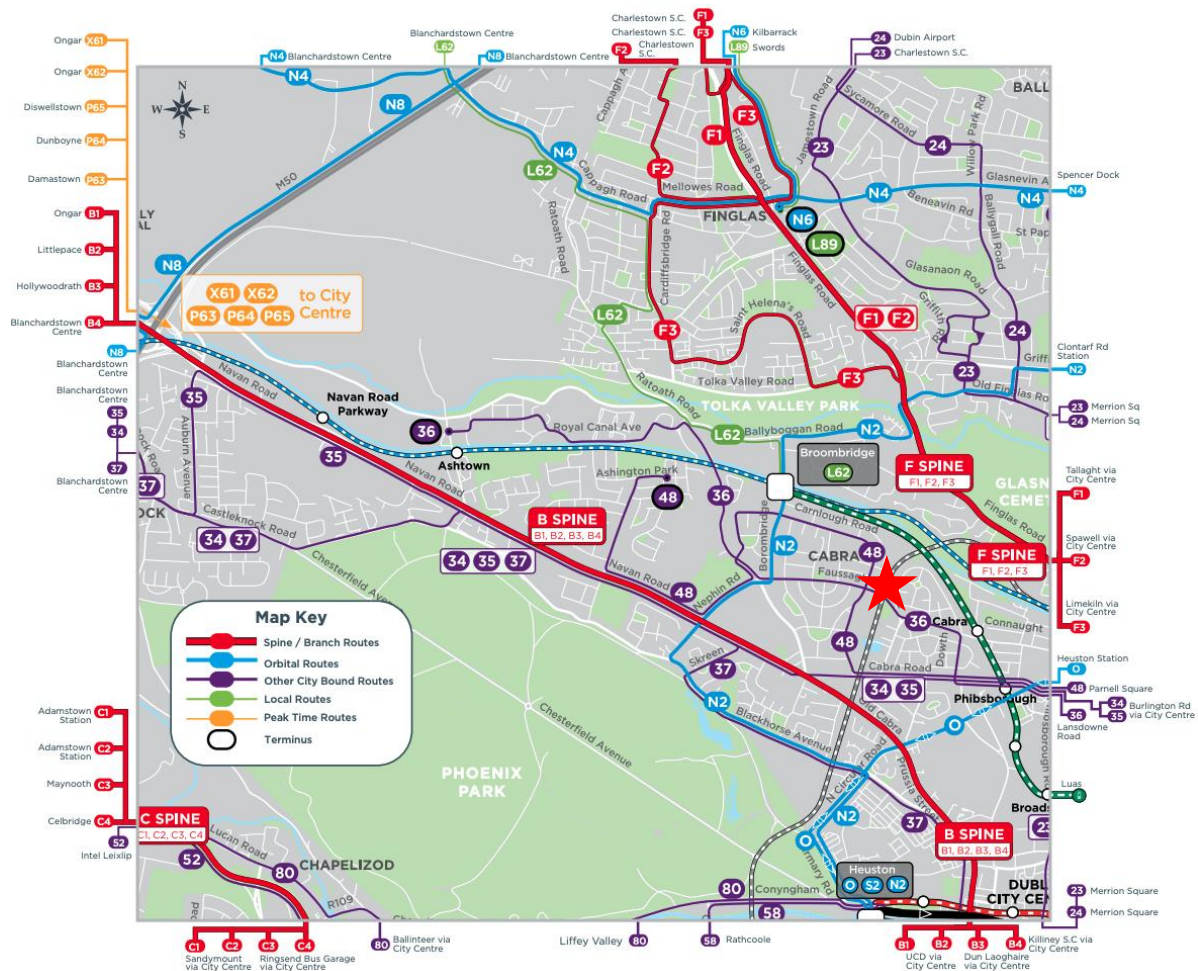


Figure 5 - BusConnects Cabra Area Map with subject site denoted by Red Star

The subject site is in proximity to the following routes:



B – Spine / Branch Route	- B1 (Ongar – UCD via City Centre) - B2 (Littlepace – UCD via City Centre) - B3 (Hollywoodwrath – Dun Laoghaire via City Centre) - B4 (Blanchardstown Centre – Dun Laoghaire via City Centre)
Peak Time Routes	- X61 (Ongar – City Centre) - X62 (Ongar – City Centre) - P63 (Damastown – City Centre) - P64 (Dunboyne – City Centre) - P65 (Diswellstown – City Centre)
Local Routes	L62 – (Blanchardstown Centre – Broombridge)
Orbital Routes	N2 (Clontarf Rd Station – Heuston)
Other City Bound Routes	34 (Blanchardstown Centre – Burlington Road via City Centre) 35 (Blanchardstown Centre – Burlington Road via City Centre) 36 (Ashtown – Landsdowne Road) 48 (Ashington Park – Parnell Square)

Table 2 - BusConnects Routes in proximity to subject site

Further, we note that the subject site sits approx. 1 km from the closest bus stop on the Blanchardstown to City Centre Core Bus Corridor Scheme.

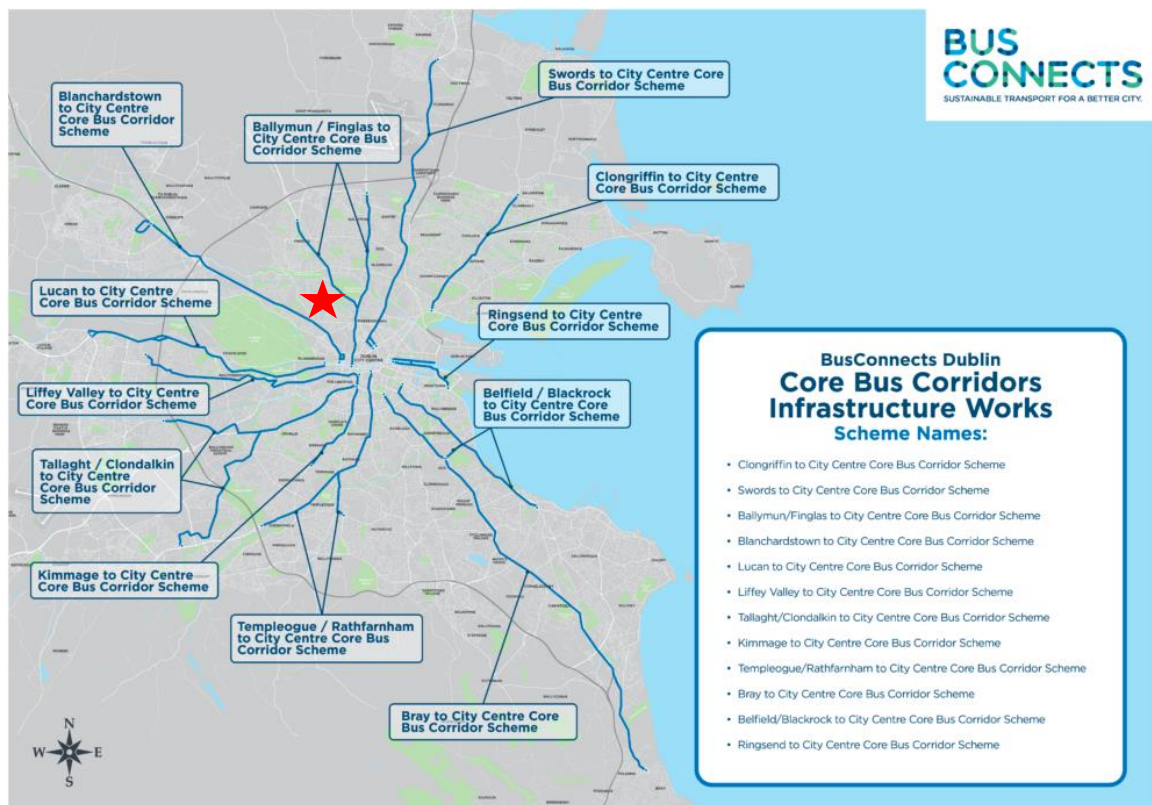


Figure 6 - BusConnects Core Bus Corridor Schemes with Subject Site identified by Red Star

Luas Services

The subject site is proximate to the Green Luas line. The closest stop being Cabra Luas stop located approx. 750 m / 10-minute walk from the subject site. The Green line (Broombridge – Brides Glen), with connections to the Red Luas line at Abbey Street. This forms part of the wider Luas network throughout the Greater Dublin Area and links the site directly to Dublin City Centre and the Red Luas line (Saggart – The Point), as set out in the following figure.

The frequency of the Luas Green Line at the Cabra Station is shown in the tables below:

Period	Southbound		
	Min	Avg	Max



05:33-07:00	6	14	9
07:00-10:00	5	20	14
10:00-16:00	12	14	13
16:00-19:00	4	16	10
19:00-00:19	11	15	13

Table 3 - Cabra Luas Stop Frequency (Monday - Friday)

Period	Southbound		
	Min	Avg	Max
06:33-10:00	15	20	15
10:00-16:00	14	16	14
16:00-19:00	14	14	14
19:00-00:19	13	22	15

Table 4 - Cabra Luas Stop Frequency (Saturday)

Period	Southbound		
	Min	Avg	Max
07:03-12:00	12	24	17
12:00-19:00	24	24	24
19:00-23:19	15	31	19

Table 5 - Cabra Luas Stop Frequency (Sunday)

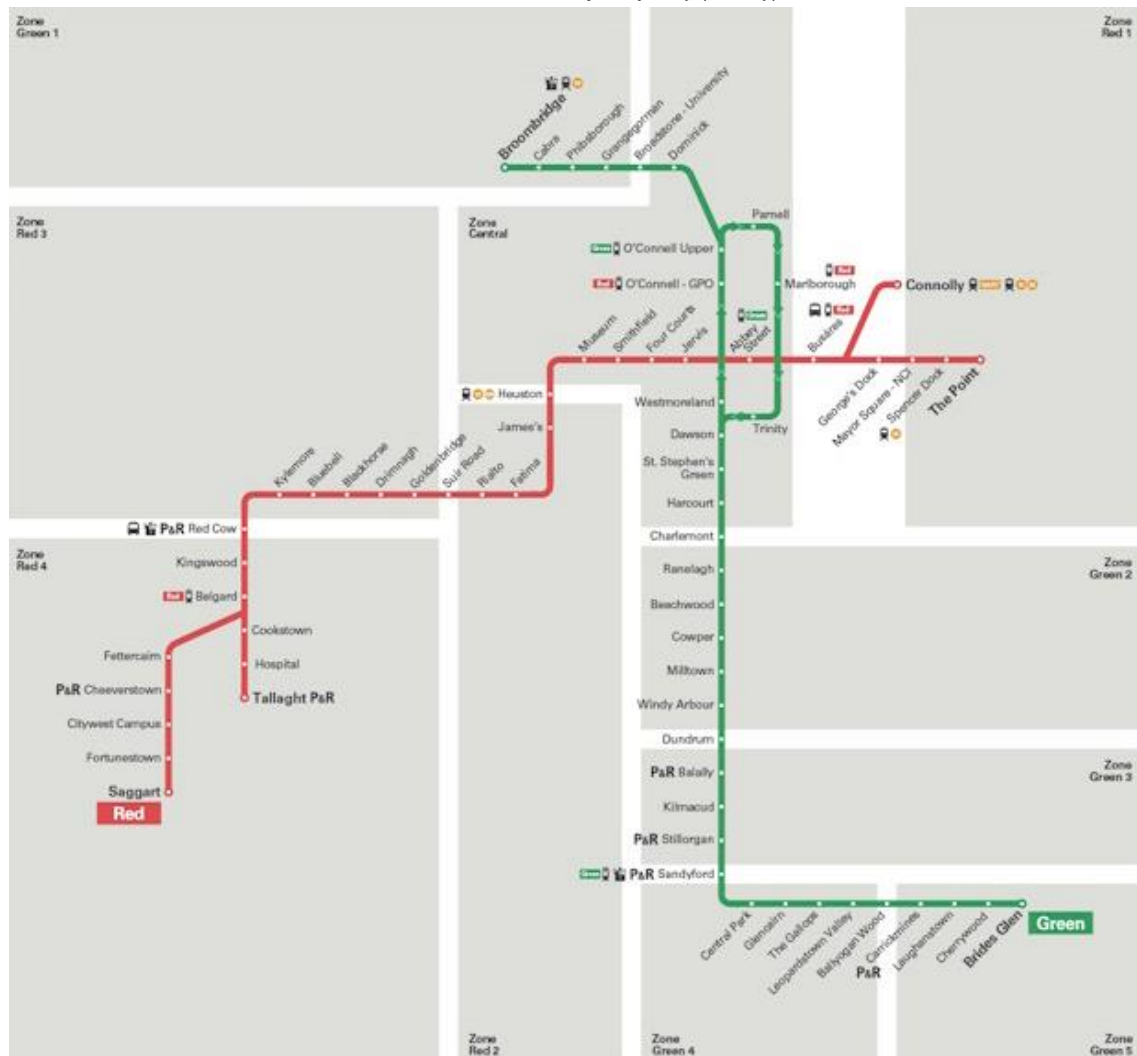


Figure 7 - Luas Network Map (Cabra Luas Stop outlined in Orange)





DART

The subject site sits approx. 1.2 km / 16-minute walk from the Broombridge Train Station. The Broombridge Station is serviced by InterCity and Commuter Trains with destinations such as Dublin Connolly, Dun Laoghaire, Grand Canal Dock, Sligo, M3 Parkway, Longford and Maynooth.

Further, we note that the Transport Strategy for the Greater Dublin Area 2022-2042 contains an objective for the provision of a new Dart Station to be located in Cabra:

Measure Rail6 – New Rail Stations

“The NTA, in conjunction with Irish Rail, will develop new rail stations at Cabra, Glasnvin, Heuston West, Kylemore, Woodbrook, west of Sallins, west of Louisa Bridge and west of Maynooth. Kishoge station will also open in the short term as development of the Clonburris SDZ is realised. Other stations will be considered where development patterns support such provision.”

As part of the rail alignment and upgrade works recently permitted by An Bord Pleanála (ABP-316119-23), under the DART+ South West programme, upgrade works are proposed to the Phoenix Park Tunnel Rail adjoining the subject site however, no new train station was within the scope of works proposed and / or permitted.

As such, we note that the subject site will be proximate to a future new Dart Station which is earmarked between Cabra Road and Fassaugh Avenue.

Proposed MetroLink

The subject site will also be located in proximity to the proposed Dublin Metrolink, which is planned to connect Dublin's City Centre to Dublin Airport and Swords in the north of Dublin. The planned service will have one station within relative proximity to the site in Glasnevin located approx. 1.5 km / 21-minute walk from the subject site. Further we note, that a future crossing point across the Royal Canal is proposed at Shandon Park which will further increase permeability in the surrounding area and will have the potential to reduce the walking distance to the future Glasnevin Metro stop.





Figure 8 - Proposed MetroLink Map

Active Travel – Pedestrian & Cyclist Facilities

The majority of the roads approaching the subject site incorporate good quality pedestrian facilities. In the immediate vicinity of the subject site, pedestrians can benefit from an existing footpath of approximately 2 m width and sufficient street lighting. A signalised pedestrian crossing exists on Fassaugh Avenue approx. 78 m / 1-minute walk from the subject site. The following map outlines the reach from the subject site by foot within a 20-minute walk at 5-minute intervals.



Figure 9 - Subject Site Reach by Foot

At present, there is poor cycling infrastructure in the immediate vicinity of the subject site. However, we note that in January 2023, the Greater Dublin Area (GDA) Cycle Network Plan was adopted as part of the GDA Transport Strategy 2022-2042.

The Cycle Network Plan identified and determined in a consistent, clear and logical manner, the following cycle networks within the GDA:

- The Urban Cycle Network at the Primary, Secondary and Feeder level;
- The Inter-Urban Cycle Network, linking the relevant sections of the Urban Network and including the elements of the National Cycle Network within the GDA. The Inter-Urban Network also includes linkages to key transport locations outside of urban areas such as airports and ports; and
- The Green Route Network that are cycle routes developed predominately for tourist, recreational and leisure purposes.

From the extracted Dublin City Centre Proposed Cycle Network map below, we note that Fassaugh Road is proposed to become a 'Secondary Route' and the subject site will also be proximate to 'Primary' routes on Navan Road and the R108, and a Green Route at Shandon Park. Further, a future crossing point is indicated at Shandon which will further improve walking and cycling accessibility across the Royal Canal.



2.3 Surrounding Context

The area surrounding the site features a variety of services, facilities, and amenities within 1km as illustrated in the figure below. The subject site is located in an area with an established and significant range of social, community and cultural infrastructure within walking distance, which also supports students.

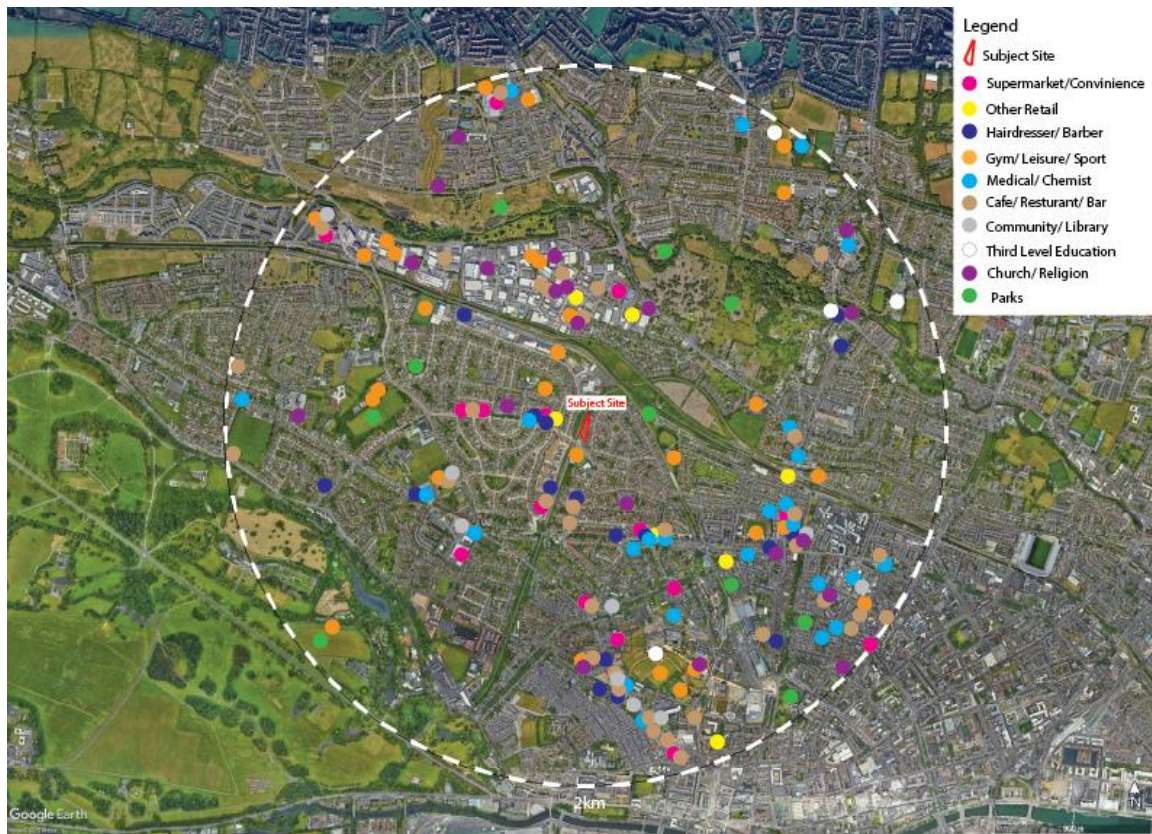


Figure 11 - Surrounding Social Infrastructure Map

As demonstrated in the context map above, the subject site's city location benefits from a range of social infrastructure, including civic, cultural, community, healthcare, recreational facilities and educational services in the surrounding area. Considering this, the proposed development will support these existing facilities and will not put undue pressure on existing infrastructure.

Further, we note that the subject site is within walking distance of a number of neighbourhood centres with convenience retail providing day-to-day essentials. The subject site is also proximate to a vast quantity of green open spaces, including public parks, squares, sports clubs and stadiums. The subject site is also within walking distance of the Phoenix Park, one of the largest enclosed public parks in any capital city in Europe.



Figure 12 - Surrounding Public Parks and Convenience Retail



3 Proposed Development



Figure 13 - Proposed Site Layout Plan

The proposed development provides for a Large-Scale Residential Development, which in summary, shall consist of:

- a) Demolition of the former 'Matt's of Cabra' public house and associated structures (approx. 376.55 sqm).
- b) Construction of a purpose-built student accommodation scheme consisting of 249 no. student bedspaces arranged in 32 no. clusters of 4, 7, 8, 9 and 10-bedroom units (including 13 no. accessible units and 10 no. studio units) each with associated shared kitchen/living/dining areas in 2 no. blocks ranging in height from 1-6 storeys;





- c) Internal amenity spaces (approx. 347.1 sqm) including a student lounge area, laundry room, postal room and a reception / office / kitchen / tearoom across the ground floor and first floor levels;
- d) External amenity areas (approx. 2,971.4 sqm) including 1 no. outdoor terrace at fourth floor level of Block A (193.1 sqm);
- e) Approx. 405.5 sqm of public open space in the form of a public plaza fronting Fassaugh Avenue;
- f) Switch room, ESB substation, sprinkler room and bin storage all in a single storey services building along the eastern site boundary;
- g) A total of 308 no. bicycle parking spaces at surface level (258 no. long term, covered bicycle parking spaces including 12 no. cargo bicycle parking spaces and 50 no. visitor bicycle parking spaces);
- h) Vehicular access to be provided from Fassaugh Avenue;
- i) 1 no. accessible car parking space proposed within the site;
- j) It is proposed that the development will be used for short term tourist or visitor accommodation outside of academic term times, in accordance with the definition of student accommodation.

The development will also provide for all associated service connections, public lighting, cold water storage and thermal store room, hard and soft landscaping, planting, formal activity equipment, removable bollards, tactile paving, boundary treatments, nature-based SuDS features, green and blue roofs, and all associated site clearance, excavation and development works above and below ground.



4 Policy Context

It is well documented in national, regional and local policy that there is a demand for purpose-built student accommodation.

4.1 National Planning Framework: Project Ireland 2040

Section 6.6 of the First Revision to the National Planning Framework (NPF) highlights the growing pressures on student accommodation, which are expected to intensify in the coming years. The NPF emphasises the importance of location and accessibility to the purpose-built student accommodations. The NPF states:

“Demand for student accommodation exacerbates the demand pressures on the available supply of rental accommodation in urban areas in particular. In the years ahead, student accommodation pressures are anticipated to increase. The location of purpose-built student accommodation needs to be as proximate as possible to the centre of education, as well as being connected to accessible infrastructure such as walking, cycling and public transport. The National Student Accommodation Strategy supports these objectives.”

The proposed development aligns with these objectives by providing purpose-built student accommodation in a location that is well-positioned to serve both the needs of students and the broader community. By offering dedicated housing for students, this development will reduce the strain on the housing market, thereby easing demand in the surrounding area.

4.2 National Student Accommodation Strategy (2017)

The National Student Accommodation Strategy was published in May 2017 and the purposed of this Strategy is to ensure that there is an increase level of supply of purpose built student accommodation to reduce the demand for accommodation in the private rental sector both by domestic and international students attending Higher Education Institutions (HEIs).

A key target of the Strategy was the construction of at least an additional 21,000 PBSA bed spaces places by 2024 over the baseline figure of 33,441 PBSA bed spaces which are currently available.

It is key to emphasise the following extract from Section 2 of the Strategy:

“Housing for students is a specific and important segment of the overall housing sector with distinct characteristics and requirements. This has a significant related impact on the private rental sector and an increase in the provision of student accommodation is a key priority in addressing the housing crisis. There are a significant number of students renting from private landlords in Ireland as was highlighted in the National Economic and Social Council (NESC) Report “Ireland’s Rental Sector: Pathways to Secure Occupancy and Affordable Supply”³ which was published in May 2015. The NESC report also outlined that on average, there are 2.73 persons per household in Ireland. While it is likely that the occupancy of a household comprising solely of students is going to be higher than the national average, it is a fair extrapolation to make that every 4 students housed in either PBSA or in Digs will free up an additional housing unit in the private rented sector that would otherwise have been occupied by students. The impact of an additional 21,000 student accommodation bed spaces, in addition to an additional 1,500 Digs spaces, will free up at least an additional 5,000 rental units for the wider residential rental sector.”

The Strategy sets out concerns regarding facilitating rental levels of residential property generally and states that:

“The most effective way to reduce and stabilise rents in the long term is to increase supply and accelerate delivery of all types of housing. The aim of this strategy is to support the accelerated availability and delivery of student accommodation including both digs and PBSA, which should in turn lead to a stabilisation of the cost of accommodation”.

The Report highlighted that in 2017, there was an unmet demand for 23,634 bed spaces. Drawing together the estimates of supply of, and demand for, PBSA shows that the demand for PBSA currently outstrips supply and this trend will continue to 2024.

“As highlighted already, in Dublin in particular, all HEIs are reporting that their current provision is heavily over-subscribed and students are finding it difficult to secure accommodation on or near their campuses. The des will continue to work with stakeholders to ensure support for the further development of PBSA both by HEIs and private developers.”

The proposed development will provide 249 no. student bed spaces and will help to reduce demand on the private rental section aligned with the principles and objectives of the National Student Accommodation Strategy, 2017.

4.3 Design Guide for State Sponsored Student Accommodation

The "Design Guide for State Sponsored Student Accommodation" (Version 1.0, May 2025) outlines the Irish Government's new approach to developing student accommodation. It focuses on standardised, cost-effective, sustainable, and inclusive design, particularly for state-sponsored on-campus housing.

In early 2024, the Government approved a long-term student accommodation policy that will see the State investing directly in student accommodation for the first time. The purpose of the new Student Accommodation Strategy is to ensure that the availability and rental cost of student accommodation no longer act as barriers to accessing or progressing through third-level education. By addressing these challenges, the aim is to create an equitable environment where students, regardless of their background, can fully benefit from the opportunities provided by higher education.

The Student Accommodation Standardised Design Study was undertaken to draft new design standards for state-sponsored on-campus student accommodation. Its objective was to establish best practice and value for money for the State ensuring additional supply for students, while enabling the delivery of modern facilities that are functional, sustainable, maintainable, flexible, and safe, with high quality architectural design.

Adherence to these standards is not mandatory for the purposes of the assessment of planning applications under the Planning and Development Acts however, it is envisaged that elements of this guide may form part of future updates to Section 28 guidelines under the Planning and Development Act 2000 or a National Planning Statement under the Planning and Development Act 2024.

The Guide sets out minimum space and design standards and it is confirmed that the proposed development exceeds the minimum space standards.

4.4 Planning Design Standards for Apartments Guidelines for Planning Authorities, 2025

The Planning Design Standards for Apartments: Guidelines for Planning Authorities 2025 were published on the 8th of July 2025, replacing the Sustainable Urban Housing: Design Standards for New Apartments Guidelines for Planning Authorities 2023.

Section 5.2 of the Apartment Guidelines specifically refers to purpose-built student accommodation in the Design Guide for State Sponsored Student Accommodation (as outlined above).

The Apartment Guidelines note that while adherence to the Design Guide is not a mandatory policy requirement, specific standards set out in the Design Guide are identified as being of particular importance from the perspective of providing appropriate flexibility for these typologies to be applied within the planning system.

Specifically, the Design Guide allows for the provision of single study bedrooms without the requirement for an en-suite bathroom, with a minimum required area of 8 sq.m for a single study bedroom and a minimum required area of 11.5 sq.m for a study bedroom incorporating an en-suite bathroom.

Accordingly, the following is a requirement of the Apartment Guidelines:

Specific Planning Policy Requirement 8

- (A) (i) *There shall be no requirement or restriction in relation to the provision of en-suite bathrooms for single study bedrooms within Purpose Built Student Accommodation schemes.*

(ii) *The minimum required area for a single study bedroom without en-suite facilities is 8 sq.m and the minimum required area for a single study bedroom with en-suite facilities is 11.5 sq.m; and statutory plans may not set out minimum required areas that exceed the minimum required areas set out within this SPPR.*

(iii) *The minimum space requirements for kitchen/dining/living areas serving 10 and 12 persons are 3.6 sq.m and 3.3 sq.m per person, respectively; and statutory plans may not set out minimum required areas that exceed the minimum required areas set out within this SPPR.*

(B) *Where any other requirement or restriction is set out within a statutory plan, this Specific Planning Policy Requirement shall apply to any single student accommodation scheme.*

As detailed in the accompanying Planning Report prepared by Brock McClure Planning & Development Consultants, the proposed development meets and exceeds the minimum standards of SPPR 8.

4.5 Dublin City Development Plan 2022-2028

Section 5.5.7 of the Development Plan identified that purpose-built student accommodation (PBSA) can play a positive and important role in meeting housing demands and can also regenerate and enhance neighbourhoods. At the time of writing of the Development Plan, it was identified that there were 53,000 students in the city. International comparisons indicate that Dublin has a relatively low proposed of students accommodated in PBSA, with approximately 16% of the student population accommodated in PBSA in 2018, compared to approximately 38% in Edinburgh.

Section 15.13.1 of the Development Plan sets out that the City Council supports the provision of high-quality, professionally managed, purpose-built third-level student accommodation, either on campus or in accessible locations adjacent to quality public transport corridors and cycle routes, in a manner which respects the residential amenities of the locality.

The proposed development has had regard to the following policies:

QHSN44 Build to Rent/Student Accommodation/Co-living Development:

“It is the policy of DCC to avoid the proliferation and concentration of clusters of build to rent/student accommodation/ co-living development in any area of the city.”

The purpose of this report is to show (based on evidence) that the proposed development will not result in a proliferation and concentration of PBSA’s in the surrounding area.

QHSN45 Third-Level Student Accommodation:

“To support the provision of high-quality, professionally managed and purpose-built third-level student accommodation in line with the provisions of the National Student Accommodation Strategy (2017), on campuses or in appropriate locations close to the main campus or adjacent to high-quality public transport corridors and cycle routes, in a manner which respects the residential amenity and character of the surrounding area, in order to support the knowledge economy. Proposals for student accommodation shall comply with the ‘Guidelines for Student Accommodation’ contained in the development standards chapter. There will be a presumption against allowing any student accommodation development to be converted to any other use during term time.”

The proposed development provides for a high-quality, professionally managed, purpose-built student accommodation which is in line with the provision of the National Student Accommodation Strategy (2015) adjacent to high-quality public transport corridors and cycle routes as outlined in 2.2 of this Report.

5 Student Accommodation Market Analysis

5.1 Ireland Student Accommodation Review 2024 – Cushman & Wakefield

According to the Ireland Student Accommodation Review 2024 produced by Cushman & Wakefield, there has been a consistent growth in the number of full-time students in Ireland over that past number of years. In 2023/24, Dublin saw 89,660 full time enrolments into higher education institutes across the county. Overall across the State, over the past 5 years, the number of Irish domiciled full-time students have risen by approx. 11,400 or 7% while international student numbers have increased by over 9,000 of 36%.

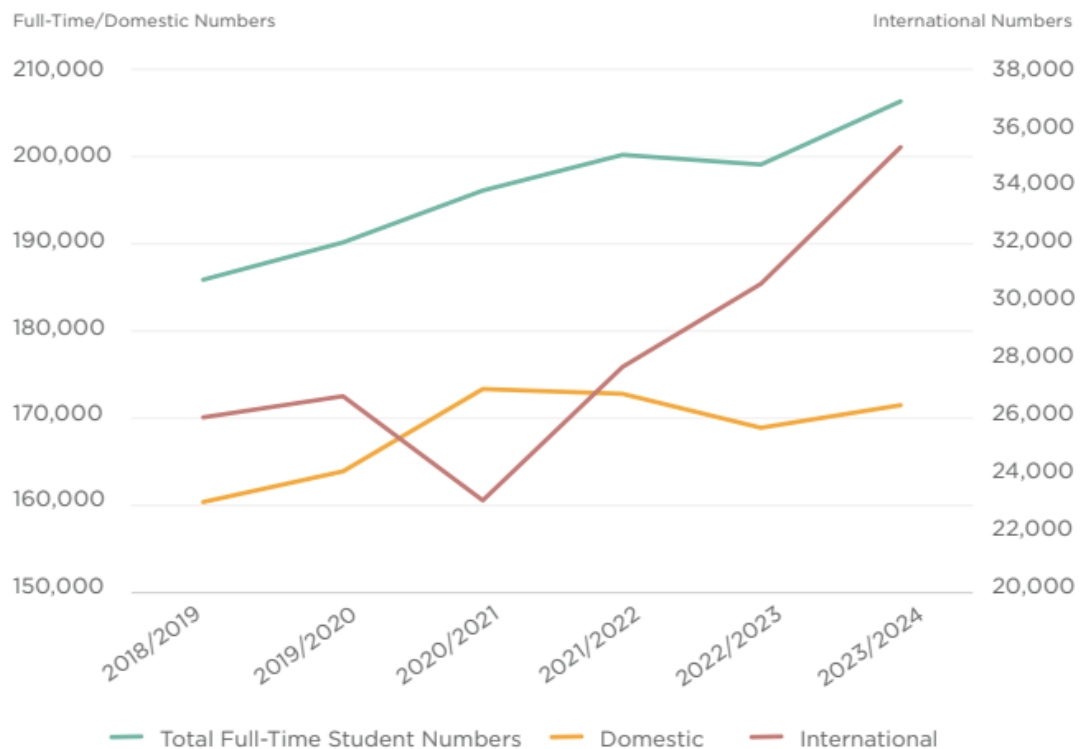


Figure 14 - Full Time Student Numbers per enrolment year

The Review estimates that total full time student numbers are set to increase significantly over the next decade. Overall it is estimated that that there will be almost a total of 240,000 students over the next decade – resulting in a growth of over 30,000 over this period.

Given the acute housing shortage already faced by students in Ireland these projections clearly have huge ramifications not only for the required investment in the sector but also in the higher education system in Ireland more broadly. It is estimated that this rise in full time student numbers alone will translate into an increase in student demand of almost 17,000 beds over the next decade. However, in reality significantly higher bed numbers than this will be required over this time horizon in order to also alleviate existing supply/demand imbalances which have spilled over into the private rented sector. To quantify this supply/demand imbalance, by 2034/35 it is estimated that total national demand pool for student accommodation could reach over 115,000 beds compared to current supply of only approximately 47,000.

Overall supply across the purpose-built student accommodation segment has changed little over the past year unfortunately, in contrast with the continued growth in demand. It is estimated that the overall stock of public and private beds has only grown by approximately 1,300 beds over the past year, a growth rate of only around 3%.

The lack of supply continues to dominate market conditions and has contributed to consistent growth in rents in recent years.

5.2 PBSA Market Outlook 2024 - Lisney

An ‘Outlook, 2024’ report published by Lisney from the outset emphasises that despite the exceptionally strong occupier, operator and investor demand, new supply continues to lag behind what is required.

Student numbers across Ireland continue to grow, which is a very positive indicator for continued PBSA demand. The most recent data is from the 2022 / 2023 academic year, and it shows that there were almost 257,000 students enrolled in Higher Education Institutions with 199,000 of these in full-time education. Since 2016 (six years), full-time student numbers have grown by 10.2%.

While the student population has grown substantially in a short space of time, the Government anticipates further growth of about 14% by 2030, which would result in nearly 30,000 more students in full-time education. Combined with the ongoing rental/housing crisis in Ireland, as well as the elevated number of domestic students commuting unsustainably long distances several times a week to university or college, occupational demand for the PBSA sector will remain exceptionally strong in 2024 and beyond. Indeed, most operators are at full capacity. Many continue to experience early pre-bookings and re-bookings from existing residents.

As of January 2024, just under 14,000 bed spaces have been delivered with a further 2,800 (across 11 schemes) under construction nationwide. This leaves a shortfall of over 4,000 bed spaces. While more than 8,000 bed spaces have planning permission in place, only about 3,000 of these have a realistic chance of being built. Lisney identify this drop off is mainly as a result of higher construction and funding costs impacting viability.

5.3 Ireland Living Sectors Market 2024 – Knight Frank

The Market Review by Knight Frank states that since 2013/2014, the Living Sector market in Ireland has been dominated by the multifamily sub-sector with a small proportion of student accommodation over the years.

The Review emphasises that student accommodation, co-living and single family investments are some of the biggest growth markets in the UK and globally. Through various planning and legislative initiatives introduces, these sectors which form a part of the housing solution, are constrained in the Irish market. Dublin does not currently rank in the top 10 cities for PBSA.

The Review estimates that almost 4,000 students beds are required per annum.

5.4 Report on Student Accommodation Supply and Demand

A report prepared by the Higher Education Authority highlights that there is a crucial demand for purpose-built student accommodation in Dublin and highlights its impact on the private rental market. It is suggested in the report that due to a lack of purpose-built student accommodation housing rental costs are increasing and particularly so in the commuter counties around Dublin.

The report argues that an *“increased provision of designated student accommodation, both on and off campus, has the potential, in the medium to long term, to ease ongoing demand pressures in the private rented accommodation sector.”*

The report also suggests that provision of additional student accommodation provides benefits to the wider economy and society through the economic activity that takes place and through the development of local urban areas in less commercially attractive areas.

The projected full time demand for education nationally in DES (Department of Education and Skills) aided institutions shows an increase from 167,991 in 2014 to 192,886 in 2024. In the context of projected significant future increase in demand for college/university places, there will be an associated significant increase in demand for student accommodation as shown in the figure below.

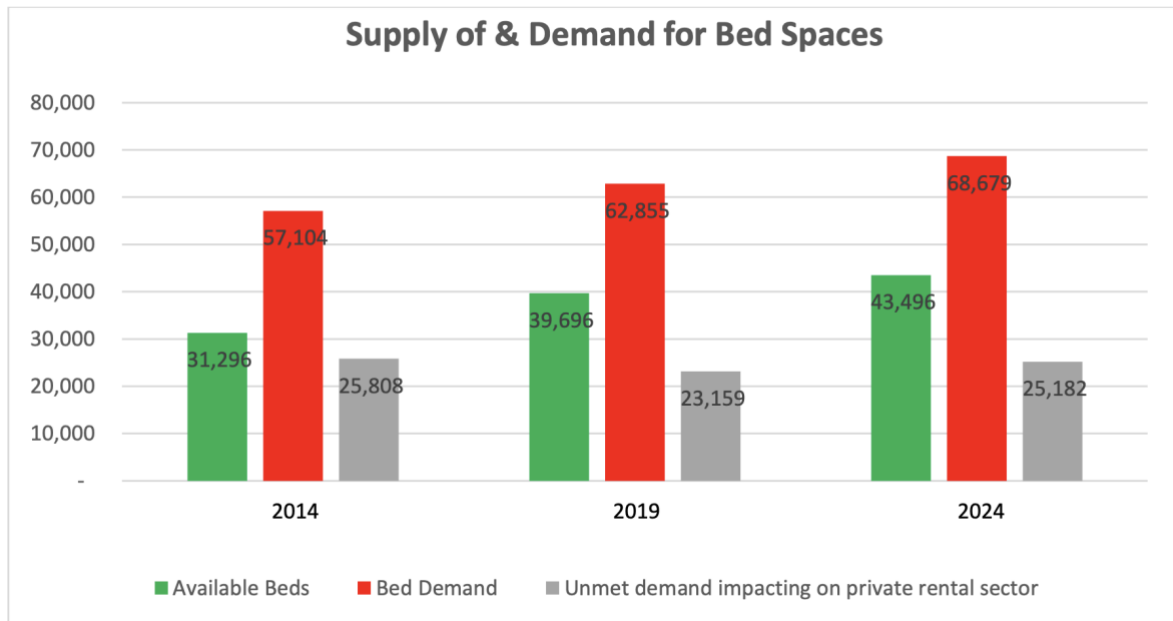


Figure 15 - Supply of and Demand for Student Bed Spaces to 2024

The current imbalance between supply and demand will not be resolved by known or estimated future developments. Indeed, increased demand due to projected additional numbers will only result in a continuation of this shortfall. It is recommended that actions should be taken to encourage additional investment and, where feasible, bring forward forecasted projects.

There is therefore an urgent need to deliver significant additional managed student accommodation schemes within accessible locations relative to third level institutions.

6 Student Demographics

It is estimated from the Dublin City Development Plan 2022-2028 that there is a population of 53,000 students in Dublin attending third level institutes however not all these students will require purpose built student accommodation (PBSA) given that this figure is made up of students that:

- Commute.
- Attend college online.
- Renting within the private sector.

For the purposes of demographic analysis, the ‘Study Area’ (shown in Figure 16 below) comprises 12 no. Electoral Division, namely: Cabra East B, Cabra East A, Cabra West B, Cabra West A, Cabra West C, Cabra East C, Ashtown A, Finglas South C, Finglas South B, Ballygall A, Ballygall D, Ballygall C, Botanic A, Botanic B, Botanic C, Drumcondra South C, Innis Quay A, Innis Quay B, Arran Quay A, Arran Quay B, Arran Quay E.

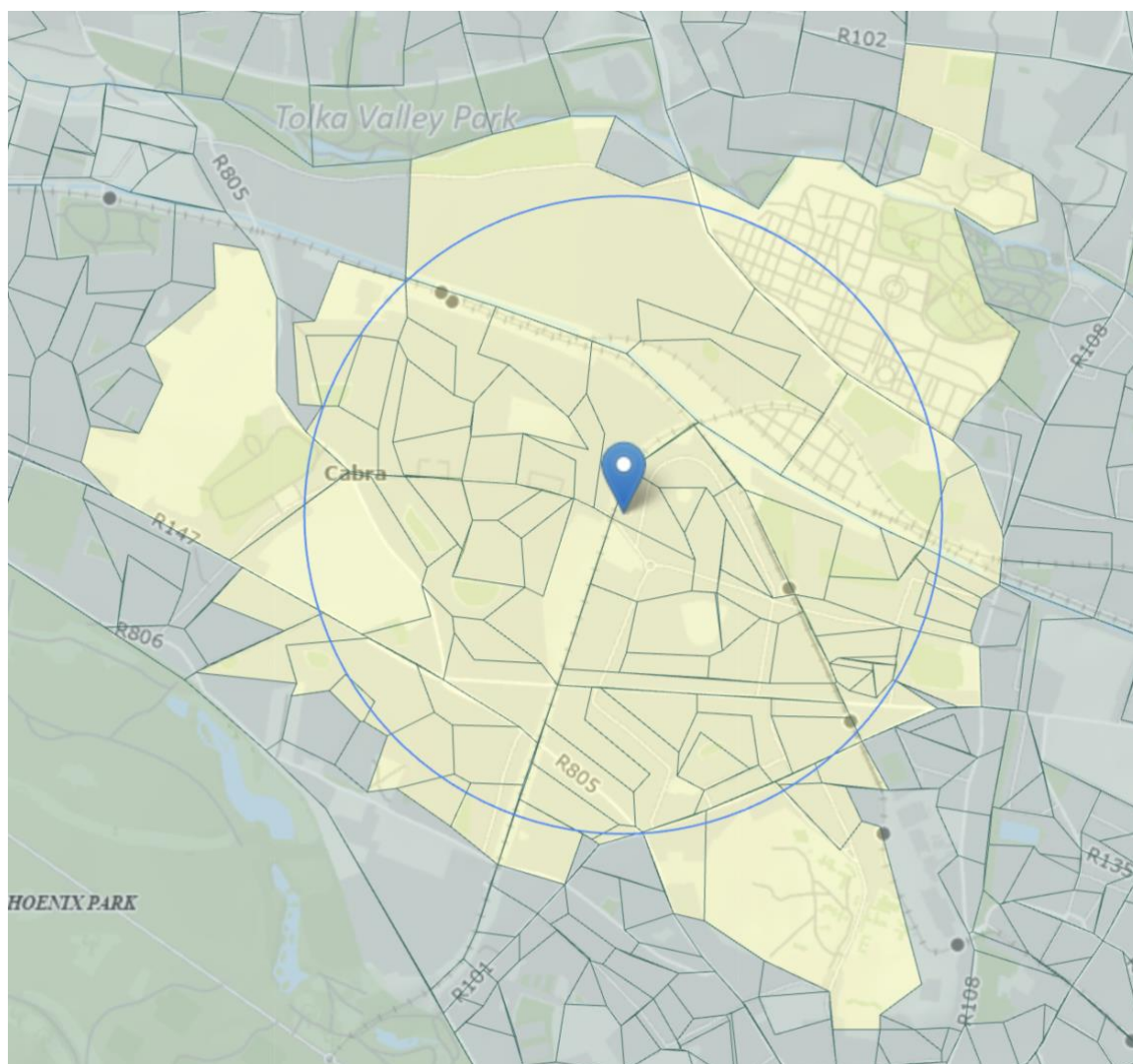


Figure 16 – Small Areas Captured within a 1km Radius of the subject site (identified by blue marker)

Utilising the 2022 Census data for small areas available from the CSO , the total population within a 1km radius of the subject site is approximately 22,548.

The population of persons aged 15 and over whose education has not ceased in the Study Area is 7,590.

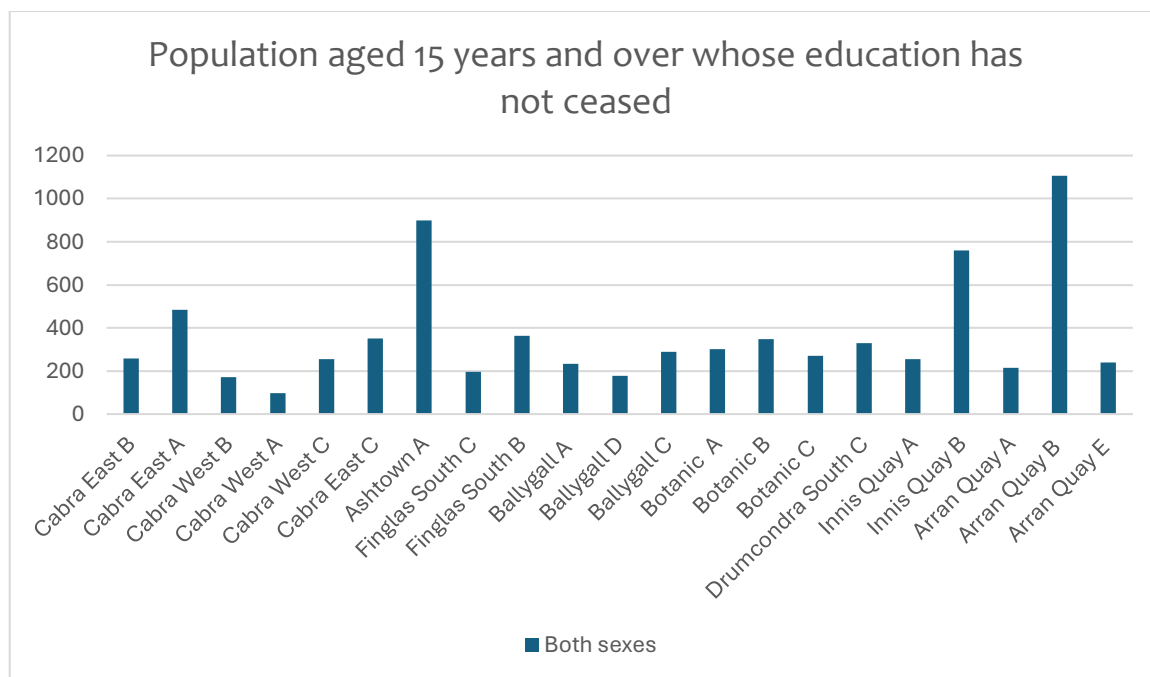


Figure 17 – Population Aged 15 Years and Over Whose Education has not Ceased

CSO data also provides a breakdown of families by family cycle broken down as follows:

- **Younger Couple:** Family nucleus of married or cohabiting couple without children where female is under 45 years or in the case of a same-sex couple, where the partner of the head of household is under 45 years. In previous censuses, this category was referred to as 'Pre-Family'.
- **Older Couple:** Family nucleus of married or cohabiting couple where female is aged between 45 and 64 years.
- **Retired:** Family nucleus of married or cohabiting couple without children where female is aged 65 years and over, or in the case of a same-sex couple, where the partner of the head of household is between 45 and 64 years. In previous censuses, this category was referred to as 'Empty nest'.
- **Pre-School:** Family nucleus where oldest child is aged 0-4 years.
- **Early-School:** Family nucleus where oldest child is aged 5-9 years.
- **Pre-adolescent:** Family nucleus where oldest child is aged 10-14 years.
- **Adolescent:** Family nucleus where oldest child is aged 15-19 years.
- **Adult:** Family nucleus where oldest child is aged 20 years and over.

There is a total of 11,609 no. families in the Study Area of which 4,558 families (39%) contain adults aged 20 years and over living at home with their parents. This high rate of families with adult children still residing at home can likely be attributed to the ongoing difficulties in securing suitable housing, in particular student accommodation.

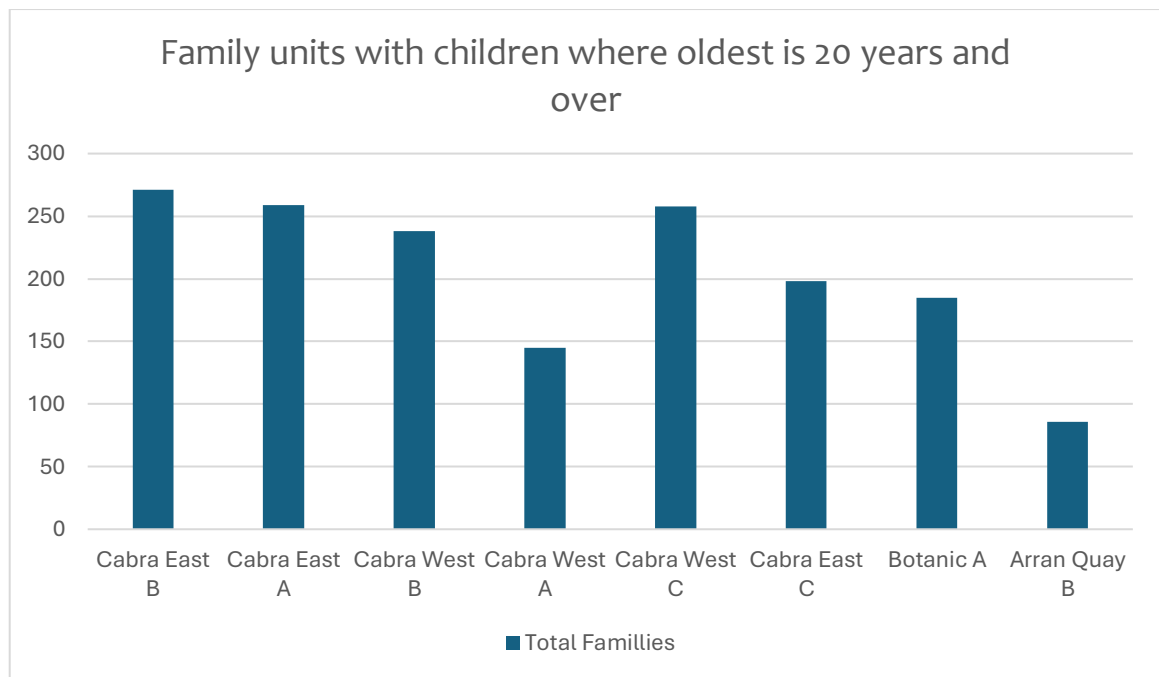


Figure 18– Family Units with Children where oldest child is aged 20 and over



7 Student Accommodation in the Area

This section evaluates the concentration of all student accommodation developments within a 1 km radius of the subject site (Study Area), as required by Section 15.13.1 of the Development Plan. The goal is to demonstrate the need for additional student accommodations in the area, thereby justifying the proposed development of a PBSA on the subject site. The analysis includes an assessment of current PBSA's, as well as live PBSA applications and recently permitted but not yet implemented PBSA developments. A desk-based study was conducted in July 2025 and reviewed in January 2026 to gather data for this report, using the following sources:

- Google searches & Google Maps;
- Individual student accommodation provider websites;
- Student accommodation rental websites.

The detailed examination outline below reveals there is no existing supply of student accommodation available in the Study Area and highlights a significant gap in the market, emphasising the necessity for additional purpose-built student accommodation to meet growing demand and diversify accommodation options in the area.

There is currently no existing, proposed or permitted but not yet constructed PBSA schemes within a 1km radius of the proposed Student Accommodation development as illustrated below:



Figure 19 – 1km Radius Map (subject site outlined in red)



In this regard, there is currently a significant under provision of existing high-quality purpose-built student accommodation in this area of Dublin City which the proposed development will heavily assist in addressing.

The proposed development will provide 249 no. student bedspaces. The additional student population of 249 no. persons within the proposed scheme which will increase the total Study Area population from 22,548 to 22,797 resulting in a marginal overall 1.1% increase in population. This is not considered to represent an overconcentration of the student population. It is noted that this does not factor in the student population living in privately rented accommodation through other arrangements i.e. standard rented accommodation or renting of a room etc. in existing residential areas.

Notwithstanding, it must also be acknowledged that the provision of a purpose-built and managed student accommodation scheme will accommodate some of these students in the new development. On this basis, there is unlikely to be any significant increase in the number of students living in the area, rather there will be a re-distribution from more informal student living arrangements in rented accommodation to the managed student accommodation development. This will, over time and together with the provision of other purpose-built student accommodation, have significant benefits in terms of freeing up existing housing, and this will make an important contribution to meeting the existing significant demand for housing in the city.

Therefore, it is respectfully submitted that the proposed development will not result in an overconcentration of student accommodation, nor lead to a detrimental effect on maintaining a balanced community or to the established character and residential amenity of the locality and on the contrary, it is our respectful submission that this is a much-needed development.



8 Conclusion

The proposed purpose-built tourist hostel at the subject site represents a new use to Chancery Street that aligns closely with local, regional, and national planning policies aimed providing PBSA's to help address the housing shortage.

The analysis within this report reveals a significant under provision of purpose-built student accommodation relative to its growing demand:

- The NPF highlights the growing pressures on student accommodation which are expected to intensify in the coming years.
- The National Student Accommodation Strategy states that it is a fair extrapolation to make that every 4 students housed in either PBSA or in Digs will free up an additional housing unit in the private rented sector that would otherwise have been occupied by students. The impact of an additional 21,000 student accommodation bed spaces, in addition to an additional 1,500 Digs spaces, will free up at least an additional 5,000 rental units for the wider residential rental sector.
- Cushman and Wakefield noted that overall supply across the purpose-built student accommodation segment has changed little over the past year unfortunately (2023-2024), in contrast with the continued growth in demand. It is estimated that the overall stock of public and private beds has only grown by approximately 1,300 beds over the past year, a growth rate of only around 3%.
- It is estimated that total national demand pool for student accommodation could reach over 115,000 beds by 2034/2035 compared to current supply of only approximately 47,000.
- As of January 2024, just under 14,000 bed spaces have been delivered with a further 2,800 (across 11 schemes) under construction nationwide. This leaves a shortfall of over 4,000 bed spaces.
- The Review prepared by Knight Frank estimates that almost 4,000 student beds will be required per annum to meet demand.
- There is therefore an urgent need to deliver significant additional managed student accommodation schemes within accessible locations relative to third level institutions.

The proposed development seeks to address this gap by introducing 249 no. student bedspaces, making a modest yet impactful contribution to the PBSA landscape in the city. The additional number of bedspaces would represent an insignificant rise in the level of such an accommodation type in the surrounding area given that our analysis has found that there is no existing, permitted and not yet constructed or live applications for PBSA's.

The additional student population of 249 no. persons within the proposed scheme which will increase the total Study Area population from 22,548 to 22,797 resulting in a marginal overall 1.1% increase in population. This is not considered to represent an overconcentration of the student population. It is noted that this does not factor in the student population living in privately rented accommodation through other arrangements i.e. standard rented accommodation or renting of a room etc. in existing residential areas.

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