SERIOUS ABOUT SUSTAINABILITY

ALSO IN THIS ISSUE

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NO TIME TO WASTE

THE NEW SCSI PRESIDENT HAS HIT THE GROUND RUNNING AND IS EAGER TO TACKLE THE COMPLEX PROBLEMS FACING THE SECTOR.

Becoming a Chartered Valuation Surveyor back in 2000 was a proud day for both myself and my family, as it meant that many years of hard work at a job and profession that I love had paid off. I had no idea that 19 years later I would be elected as President of the Society, so to say that I am truly honoured is an understatement and I thank the members of the Society for my election.

I am a true believer in getting straight to the task and not wasting time, and I have already followed up on a number of initiatives and suggestions from members. Many past presidents have said that it is a very busy year. It is also a very short one, and I intend to use my time as effectively as possible for the benefit of all members, by discipline and location. If you have any ideas you would like to discuss please do get in touch.

Through the ranks

I am a registered valuer and a Director in the valuation and advisory department in Cushman & Wakefield, where I head up the fund valuation team. I have served for two years on the Society Board as Senior Vice President (VP) and Second VP, and am also a member of the Valuation Professional Group. I also participate in several projects and working groups, including the Sustainability Group, and the Red Book Group. I have also represented the Society on the RICS International Valuation Standards Board.

We are now at a turning point. There’s a change in occupier requirements and in our lifestyles, in how we use buildings and streets for commercial, residential and civic use. At the same time, mental health awareness and climate change have become some of the most important considerations of our lives. As Chartered Surveyors, we are well placed to use our expertise to make changes for the better. We need to take action to ensure that we provide advice that informs and educates our clients, SCSI members and the general public. It’s not sustainable for us to continue as we are; we need to think differently in order to build better buildings.

With that in mind, this edition of the Journal has a strong focus on sustainability. On page 26, Katerina Kopecka discusses the Global Real Estate Sustainability Benchmark (GRESB), and how it can help investors and property management companies assess the sustainability of their assets. We also have an article from Krystyna Rawicz on the role of Chartered Surveyors in making 2020-2030 the decade of sustainability. Krystyna has also written an interesting article on construction waste for The Last Word.

We also have Part II of our fascinating article on satellites for construction site monitoring, and an excellent profile of Galway City. There is also a profile of Eloise Heron discussing her fulfilling role as an APC assessor, and a fascinating interview with Dave Walsh, the Chairman of An Bord Pleanála.
In this edition of the Surveyors Journal, there is a truly interesting interview revealing the thoughts of Dave Walsh, Chair of An Bord Pleanála. The interview covers a range of topics that are of interest to all practising surveyors, from high-rise and sprawl, to rural housing and other controversial topics in housing, such as co-living. Walsh’s insights are worth having.

There is also an interview with our new President, Johanna Gill, who has identified three priorities for her term. The first is to encourage member engagement and on this, if I can speak from a personal perspective, I would say that I have found engaging with the SCSI over the years very stimulating, and, equally importantly in my view, it afforded opportunities for networking and friendship, which have been very rewarding. Do think of how you might become involved or indeed of increasing your involvement in the Society.

I welcome too Johanna’s other priorities, which seem well chosen. The second is to raise the profile of surveying among young people. As she says, this is a great industry to work in, with exciting and very interesting careers that are often much more varied in scope than can be offered by competing professions. Hopefully, this focus will encourage more second-level students to think of a career in surveying to the benefit of the profession.

Her third priority is sustainability, and this is an area where surveyors could take a leading role, and where there is an opportunity to become advocates for what is the most important challenge facing humanity. This theme is picked up in articles by Katerina Kopecna of Aramark Property, who looks at how climate change affects investors’ decision-making processes and how it impacts on property management, and by Krystyna Rawicz, who looks at the role surveyors can play in making 2020-2030 the decade of sustainability.

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**EDITORIAL**

Tom Dunne
Editor

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A million electric cars by 2030?

- **Currently**
  - 1,100 public charge points in Ireland

- A charging point costs €149 after the €600 grant

- Motor tax of €120 a year

- Of 279 models of cars sold in Ireland, only 12 are fully electric

Source: www.esb.ie/our-businesses/ecars/charge-point-map
www.irishtimes.com
New company KRA Renewables states that it provides feasibility appraisal, design, procurement and project management for renewable energy installations (solar, wind, bio-energy, etc.) to both individual buildings and larger property portfolios, focusing particularly on existing commercial buildings. The company says it will also assist businesses and owners to move towards more sustainable models of building occupancy, refurbishment, redevelopment and property management, and is committed to driving sustainability in the built environment. KRA Renewables states that it brings the same level of dedication and personal attention as KRA Visionary Project Partners offered to clients over the past two decades.

According to KRA Renewables, it will help clients to find renewable energy solutions that fit their needs, make a significant and measurable impact to their emissions, and improve their profitability at the same time.

Wind and solar options

Ireland has some of the best conditions for wind power in Europe. In a few short years, the incorporation of wind power into the built environment will become more commonplace, as the economics and technical challenges of small-scale, building-mounted wind turbines are overcome. KRA Renewables says it is ready to bring small-scale wind power to clients at the right time.

Meanwhile, the drop in the cost of solar over the last ten years speaks for itself, with a decrease of over 60% of the total cost on average for a solar photovoltaics (PV) module (or a 99% reduction since the 1980s). However, not all solar installations are equal, and KRA Renewables states that it is committed to helping clients find the right system to satisfy their needs, whether those are focused on the best economic payback, the largest reductions of emissions, or even moving off the grid altogether.

Incorporation of storage techniques is key, and it is the combination of PV and storage that can help ‘prosumers’ to make the biggest impact to their emissions and the biggest savings.

According to the company, those worried that solar PV isn’t cost effective in Ireland can rest easy. We have lower solar irradiance than southern European countries, but this is offset by the higher efficiency gained by our lower air temperatures. Current payback time for a PV system in Ireland is between four and 10 years, for a system that will last 25 years or more.
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Claire Solon, Head of Property at Aviva, was recently appointed by Minister for Finance and Public Expenditure and Reform, Paschal Donohoe TD, as a board member of Home Building Finance Ireland (HBFI). HBFI is a private company formed under the Companies Act 2014 and the Home Building Finance Ireland Act 2018. HBFI is wholly owned by the Minister for Finance and has been established for the purpose of funding the construction of new homes in Ireland. It is a commercial entity, providing finance at market rates for commercially viable residential developments.
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Commercial building consultancy Malcolm Hollis has announced the appointment of David Nagy (left) as surveyor at its Dublin office. David has joined the company’s measured surveys team. He has two years’ experience and has worked across Ireland and Europe.

Tony Grant, partner, Malcolm Hollis in Dublin, said: “We are delighted to welcome David to the Dublin office. His experience in Europe and Ireland is sure to prove an asset to the team. I look forward to watching his career move from strength to strength at Malcolm Hollis”.

The company states that it is an independent commercial building consultancy with 23 offices throughout the UK, Ireland and mainland Europe, and over 400 employees. According to the firm, it prides itself on developing the careers of young surveyors, engineers and industry professionals.
CitA BIM Gathering comes to **Galway** in 2019

The 4th BIM Gathering conference will be hosted outside Dublin for the first time in 2019. Building on the successes of 2013, 2015 and 2017, the 2019 CitA BIM Gathering **Delivering Better Outcomes for Irish Construction** will continue to act as a focal point for all stakeholders, both from home and abroad to come together to share their research, case studies and experiences of working with Building Information Modelling (BIM).

**Book your tickets now at: www.bimgathering.ie/register**

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*Early Bird Ticket Price ends 15th August
The view from the roof of An Bord Pleanála’s (ABP) headquarters in Dublin is an indication of the level of work facing the organisation. No matter in what direction you turn, you see clusters of cranes stretching out to the city’s edge.

Chair of ABP, Dave Walsh, says there has certainly been a ramp up of activity and the complexity of some applications is also increasing: “You have to take account of environmental considerations, impacts on designated nature sites, and heritage and archaeological issues; these are all further complexities that take more time for the Board [ABP] to fully understand and to gather all the information to make an informed decision”.

**A natural move**

Before taking on the role in late 2018, Dave spent 23 years in the Department of Housing, Planning and Local Government ("the Department"). For the past three years, he has been guiding the Department on the development of the Ireland 2040 National Planning Framework and says ABP has a critical role to play in that. He is finding the move from policy creation to implementation a natural progression: “Having come from 20 years of policy, I’m really enjoying actually looking at hard proposals and deciding whether they are viable and can proceed or not … It’s a good way to test the viability of many of the policies that we [the Department] may have brought through before”.

**Interview**

Colm Quinn
Journalist and Sub-editor, Think Media
He explains that when writing policy, you have to be quite general to cover the majority of the system, and that often the cases that come before ABP are the outliers that get missed by policy and require careful consideration from planners: “You’re seeing how do you marry national policies and generalised legislation and policy with what can sometimes be fairly individual and unique circumstances. I suppose that’s where the Board sees its role as being able to balance all those considerations and come to the best decisions it can”.

Fast-track planning
The fast-track planning system has been in place since July 2017. It gave ABP new strategic housing development (SHD) powers, where developers can apply directly to the organisation for planning permission for large-scale housing developments. This was introduced to try to speed up residential building and is up for review this year.

One of the benefits Dave says is the pre-consultation process involving ABP, the developer and the local council: “You’re getting everyone who has critical inputs to make at the table at the earliest time, so that you can actually understand the context for policy at local level, at national level and also for the developer to refine or improve the application before it’s formally submitted. That has helped to improve the overall quality of the applications coming through, as well as facilitating a better understanding of the national and local policy context for the Board to make decisions”.

Turning up the volume
ABP is finalising its annual report for 2018 but Dave says that the overall number of cases it dealt with was up 6-7% on 2017: “It’s not so much that there is a huge increase in volume. What is interesting is that we’re having, this year in particular, a lot more large-scale housing development applications, both for student accommodation and for large developments. We’re currently running at more than twice last year’s rates”.

Another process which it is hoped will speed up and simplify the functions of ABP is its new IT system, Plean-IT. Dave is excited about what this means for the organisation: “That will ultimately be a portal that will facilitate online submission of applications, online submission of comments and objections, as well as payments, etc.”.

Gaps in strategic planning can lead to confusion and indecision (e.g., around ports). Dave says that while ABP doesn’t make policy: “We obviously have an important input in relation to the experiences of processing large-scale infrastructure, housing, as well as other forms of building control, such as vacant site levies. This experience is useful in feeding back into the Department, feeding into local authorities in terms of how they plan for and develop policy but really the strategic policy side is very much resting with the Department or with other relevant departments … Everything comes back to what is the overall national context through the National Planning Framework”.

High-rise and sprawl
Dublin is set to grow by 250,000 people over the next 20 years and one of Ireland 2040’s aims is to have 50-60% of that growth on brownfield sites. Some people say that high-rise may impinge on views of certain areas of the city like its Georgian core, while others see it as irresponsible not to build higher in the middle of a housing crisis and to avoid urban sprawl in our capital and elsewhere: “If an application for either a higher-density development or indeed a high rise comes before the Board, we will obviously look at national policy and guidelines set out by the Minister for Housing, Planning and Local Government but also look at the context in the development plan. There are examples where the Board is looking to promote and facilitate the optimal use of land. We’re not saying that high-rise works in every location and it wouldn’t be the sole consideration but we have to look at each case on its own merits and say what are the constraints? There may well be architectural, heritage, or other environmental considerations depending on which site is there and obviously, one of the key issues would be impacts on the visual amenity of the existing neighbourhood and location”.

Personal profile
Dave lives with his wife just outside Drogheda and has two dogs who keep him active. His college degree is in ancient Greek and Latin, and he taught as a classical scholar for a few years. He says he and his wife like to travel as much as they can, and he is also a huge Tottenham Hotspur fan.
The issue of urban sprawl is not one that is confined to our cities. Dave says that there has been a “hollowing out” of town centres around the country. He says guidelines coming out of the National Planning Framework will address how to revitalise these places: “The alternative is that as these towns grow, they will grow further out and out, requiring more supporting services; meanwhile, you have once vibrant town centres and villages that are losing their population and losing their ability to maintain commercial activities”.

Rural housing
Rural one-off housing and urban sprawl may seem like contrasting problems but both cause the stretching of resources and services. Although Dave says ABP only deals with rural housing where a decision is appealed, he comments: “You go back to what is a sustainable form of future development to cater for the needs of a changing society and a growing population. In terms of the National Planning Framework, it has a national policy objective number 19 about facilitating development in rural areas where there is an economic and social need … If we are saying people shouldn’t be allowed to build in the country or all over greenfield sites, we have to be able to say there are alternatives. I think the alternatives would be possibly looking at our smaller towns and villages that rely on a rural economy to grow and maintain their vibrancy, and if there are sites that can potentially be repurposed and redeveloped within the town bounds”.

A changing environment
When Dave took up the role, the first thing he did was see what capacity ABP might need in the future given the priority that the Government has placed on housing: “It is important that the Board has the resources and the skillset it needs. We have recently hired our first ever planning ecologist. These are skills that we would have normally relied on from external consultants. We now want to bring them in house because of the centrality of environmental considerations to so many large and smaller scale applications”. The Green Party’s surge took many of the headlines from the local and EU elections and Dave says that environmental considerations are coming into planning decisions more: “What’s more critical now is that as the directives at EU level have evolved, the requirements and the justifications that are needed to be able to say we understand what the implications are, and that there are appropriate measures to deal with those or to protect important environmental considerations, are built into our assessments, as well as our considerations at Board level”.

Co-living
Co-living developments have been causing controversy recently, with some people comparing them to bedsits and tenements. Dave says they do have a part to play for a certain section of the market: “There are clear requirements in relation to minimum standards from a building control, and indeed an amenity, perspective. I think when you look at the National Planning Framework, and you look at the population expectations and projections out to 2040 and the type of households that we are likely to be requiring – the number of people per household is dropping towards EU norms. It is moving away from a four person plus household or family, particularly within our urban centres, where there is a different expectation of what the housing need is. I think the policy in relation to shared accommodation or co-living is an important element but just one element … There are people who are starting off and looking for something different to sharing a house with somebody – something in a city centre with clear amenities around”.

A motivated organisation
A personal goal of Dave’s is to provide ABP’s staff with the opportunity to grow, develop and see the value of their work: “I’m about seven months in the post at the moment and I’m hugely impressed with the professionalism and the commitment of the staff throughout the organisation, both those that are planners and those with specialised skills, but also hugely experienced administrative staff throughout the organisation who carry forward a huge workload”.

The issue of urban sprawl is not one that is confined to our cities. Dave says that there has been a “hollowing out” of town centres around the country.
Johanna Gill is preparing for a busy year as SCSI President: “I’m finding my feet and getting a sense of what’s required, but I’m really looking forward to it”. She’s particularly excited to meet the members, as this is one of her goals for the year: “I’m very conscious that a significant number of our members are in the regions, and they have different issues to deal with. I’m keen to meet as many people as I can, in Dublin and in the regions, and also across the groups”.

She wants to focus on the challenges and traits surveyors have in common: “We tend to work in silos – you’re a quantity surveyor, or a valuer, or an agent. But the problems that we’re dealing with – around Brexit, lack of supply of staff, the housing crisis – affect all areas. We need to try and break down those silos and think about how we can work together”.

A Director at Cushman & Wakefield in Dublin, Johanna heads up the fund valuation team. She became involved in the SCSI when Sean McCormack (later a President of the Society) encouraged her to join the Red Book Working Group. This led to membership of the Valuation Professional Group, the APC Subcommittee, the Education Standing Committee and, more recently, the Sustainability Working Group. She is a firm believer in getting involved in one’s professional association: “In the SCSI, we have so many members from different professional groups and in different locations. If we don’t have lots of different people challenging the plan, we won’t be able to do the best thing for everybody”.

NEW SCSI PRESIDENT JOHANNA GILL TALKS ABOUT HER PLANS FOR THE YEAR AND THE BIG ISSUES THAT WILL BE OCCUPIING THE SCSI DURING HER PRESIDENCY.
Priorities

Johanna has identified three key priorities for the year. As mentioned earlier, she wants to encourage more member engagement: “A lot of the time people are not really sure how to get involved, so I’m really keen to try and break down some of those unknowns and make people realise that actually it’s fairly straightforward. You put your hand up and say ‘I’ll do something’, and you do it. Also I think people think that they have to commit to being on a committee or a group and you don’t. If we could get more people involved as APC assessors, or doing an hour’s CPD event, that’s not a big commitment but it makes such a difference”.

With staff shortages right across the sector, a second priority is continuing to raise the profile of the profession among young people in second level who are considering their career options. The Society is looking to see how it can partner with other groups to achieve this, including supporting member businesses: “We’re looking at potentially doing a Transition Year programme or, in conjunction with members, a programme that member firms could use with guidance around, for example, what you might do with a Transition Year student on work experience in your office”.

For Johanna, it’s about getting the message across that this is a great industry to work in: “If you get talking to a surveyor, most of them will very quickly become quite animated about how they love their job and the different things they do every day, how exciting it is. It really is a great career, and I think we need to sell that more. We need to be very proud of that”.

Building better buildings

Johanna’s third priority for the year is the topical, and vital, issue of sustainability: “It impacts across all groups in terms of how we use commercial, residential and civic spaces. For new buildings it’s easy. You’re starting from scratch and you need to look at the products that you’re putting into the building, striking a balance between cost and lifecycle cost, and how it’s going to impact on energy use in the future. In terms of existing properties, it’s much harder to retrofit, and can be very costly, but I think we need to start looking at it”.

The benefits reach across the sector: “It’s a benefit for the property owner in terms of better tenant engagement, potentially better value properties, and for businesses in terms of improved productivity, less absenteeism, winning talent. If you have a nice environment to work in, people are attracted to that”.

She feels that developers are thinking along those lines, and for a variety of motivations: “At the end of the day a lot of people are in business to make money and developers are not necessarily building an environmentally or person-friendly building because they think it’s the right thing to do, they’re building it because they think it’s potentially going to be worth more, or the tenant is going to pay more for it. But if we’re getting the right result in terms of better buildings, that’s fine”.

The SCSI’s working group on sustainability is providing CPD to members, and the autumn conference will also have a focus on sustainability: “The Government has now declared a climate emergency, and as surveyors we’re really well placed to advise and guide, and to facilitate change. We need to stand up and be counted, get involved and change our ways of delivering the end product. One of our remits as a Society is to benefit wider society. That is part of our DNA if you like, and it is very important”.

If you get talking to a surveyor, most of them will very quickly become quite animated about how they love their job and the different things they do every day, how exciting it is.
The elephant in the room
Of course, it’s impossible to talk about issues in property and construction without talking about the housing crisis: “We can’t have a situation where we’ve got governments coming in and out and people doing things because of a local election. We need to have a long-term, properly-thought-out strategy that we can deliver”. She feels that while the entry of commercial landlords into the sector has met with some criticism, they have had a positive impact: “They’ve done a lot to improve the quality of the rental market and our rental product, and I do think there’s a place for them”.

The same applies to the recently mooted ‘co-living’ concept: “Of course that’s not going to solve the housing crisis, but it is providing a product for a certain cohort”. She welcomes the fact that the SCSI continues to engage with the Government on these issues, and hopes that these interventions will bear fruit: “I think [the Government is] open to our views. There’s never been a closed door, but it’s more about what they are doing with that information”.

Cautious optimism
With the bad old days of recession behind us, there is evidence all around of economic growth and, to an extent at least, a return to the good times. But Ireland as ever is subject to external forces, such as our dependence on foreign direct investment, including significant investment in property, and the ever-present spectre of Brexit. Indeed, the OECD recently expressed concerns about these very issues. Johanna shares the concerns, but feels that the Ireland of 2019 is very different to that of 2005: “If you look at the stats in terms of GDP, consumption, unemployment, all of those point to a solid economy and good growth, but Ireland is a very small, open economy, and we’re very much dependent on what happens elsewhere. The presence of international investors in Ireland from a property perspective has helped the market hugely. It’s put in an element of professionalism, and long-term thinking, that we didn’t have last time. Subject to the risks around what happens globally, they could pull out, but I don’t personally see that that’s any more of a risk compared to where we were before”.

Johanna remains “cautiously optimistic” about the prospects for the sector, and the economy in general: “I’m a valuer so I’m always a bit cautious, even when everything seems to be absolutely fine! So much depends on things that we have no control over. The falling consumer sentiment in February/March did concern me, but I think that was an adjustment that needed to happen because people hadn’t really thought about how Brexit, for example, was going to impact them. I think the moderation on the residential side is also a good thing in terms of the longevity of the market. I think we needed a little bit of a sense check because strong levels of growth like we’ve had over the last number of years are not sustainable”.

Open door
Since taking on the role of President, Johanna says she has been overwhelmed by the kind messages and offers of support she’s received from across the industry, and reiterates her wish to be available to members throughout the year: “If somebody wants to get in touch, just drop me a note and we’ll meet up for coffee or a chat. I’m hoping to attend regional CPD events and committee meetings so I will be out and about around the country”.

She’s also keen to remind members of the fantastic resource that is available to them in the Society’s headquarters in Merrion Square: “We’re just finishing the refurbishment, and the building is available now. If people are in town and they need somewhere to sit for a couple of hours, or if they wish to use a meeting room, it’s a terrific resource and it would be great to see the building used more intensively”.

The accidental surveyor
From Ballinteer in Dublin, Johanna says that she became a surveyor by accident: “I had no family in property at all. I stumbled across the two-year certificate in Auctioneering, Valuations and Estate Agency in Bolton Street and thought it would be interesting – two years and then I could sell houses. I very quickly realised that it wasn’t actually about selling houses at all! It was about commercial property and all sorts of other things and I loved it from the word go”. Johanna went on to complete her degree at Oxford Brookes University in the UK. She worked in the UK for ten years before returning to Dublin in 2005 to work with DTZ, which became Cushman & Wakefield. In her spare time she tries to find time to run and cycle, and at the time of our interview was preparing to take part in the Ring of Beara cycle. She also loves to read, although her book club is taking a back seat this year as she concentrates on her SCSI duties.
MAKE A LIST, CHECK IT TWICE

THE NEW SCSI ‘SAMPLE REPORT ON BUILDING INSPECTION’ OUTLINES WHAT A BUILDING SURVEYOR SHOULD ASSESS WHEN INSPECTING A RESIDENTIAL PROPERTY.

Roofs
- Construction materials (e.g., tiles or slates on timber).
- Any evidence water could get in or has gotten in?
- Guttering, fasciae and soffit materials and condition.
- Description and condition of connections with walls.

Planning legislation
- If instructed, investigate planning history of property.
- Any evidence of alterations to the property that would have required planning permission?

External walls
- Construction type and materials used.
  - Are the walls plumb? Are there any cracks?
  - Do they require cleaning or painting?
  - Are there weepholes present?

External grounds and boundaries
- How is the property bordered (walls, fences, etc.) and are boundaries well defined?
- Any sheds or other structures present?

Building Regulations
- Is there good compliance with the Building Regulations throughout?

Windows and external doors
- Materials used and are windows double glazed?
- What is their condition and is any adjustment needed?
- If glass is untoughened, does it have a protective film?

The above represents a selection of the items that should be included in an inspection. The full report is available at www.scsi.ie/professional_groups.

FEATURE
Colm Quinn
Journalist and Sub-editor, Think Media
Roof voids/attics
- Type of insulation used and could it be improved?
- Condition of party wall. Would it act as a sufficient fire break?
- Dampness?
- Inaccessible areas?

Internal doors and joinery
- Condition and materials used.
- Quality of ironmongery.
- Quality of staircase (if present) and does it meet regulations?

Ceilings
- Type and condition. Any redecoration needed?
- Any pattern staining? This indicates poor levels of insulation.
- Condition of ceiling to wall joints.

Building services
- Type of heating system and any improvements needed.
- Electricity – location of distribution board. Condition of trip switches. Any signs of overheating in the system?
- Hot and cold water – Where is hot water stored? Condition of hot and cold water containers.
- Ventilation – are extract fans working and located where they are needed? Condition of ventilation in the house generally.
- Fireplaces and flues – should chimney be cleaned? Are carbon monoxide alarms present?
- Drainage – are drains free from obstruction?

Floors
- Condition and materials used.
- Finishes throughout.
- Potential trip hazards?

Internal partitions and wall finishes
- Materials used and condition.
- Redecoration required?
- What is the standard of insulation?

Finish your report with a conclusion and list of general recommendations.
The study area for this project is located in the inner part of Dublin Bay on the east coast of Ireland. The Alexandra Basin Redevelopment (ABR) Project is located in the approaches to Dublin Airport and 2.5km south west of a nature and bird sanctuary, limiting options for aerial or remotely piloted aircraft systems (RPAS) surveys. The ABR Project is the first part of the larger redevelopment of Dublin Port that forms part of Dublin Port Company’s Masterplan 2012-2040.

Results
The output of the photogrammetric process was a point cloud coloured by elevation, as illustrated in Figure 3a, where blue represents low elevations (e.g., the ground) and red represents high elevations (e.g., building roofs). The synoptic potential of satellites as a mapping tool is reinforced in Figure 3b, as this displays the extent of data captured during a single acquisition with multiple potential applications. Despite a focus on a single test site, the images covered the whole of Dublin city and we were able to map this in 3D from a single satellite overpass. The high spatial resolution of the Pléiades satellite imagery results in approximately one point per pixel, i.e., four points per m², a density not dissimilar to many conventional airborne light detection and ranging (LiDAR) platforms.
Five test buildings were then selected for validation, with the target structures distributed throughout the site, ensuring robust testing of the methodology (Figures 3c-g). These buildings represented a selection of structures around the port, including historical buildings for preservation, storage buildings, and buildings scheduled for demolition. These structures range from approximately 30m to 125m in length, and heights range from approximately 3m to 12m. The dimensions (length/width/height) of each building were measured in the satellite-derived point cloud and subsequently compared with measurements from the validation data (Table 1). Five measurements of each plane were manually recorded in a computer-aided design (CAD) environment (15 measurements per structure) and a series of accuracy estimates created including mean absolute error (MAE) and root mean squared error (RMSE).

The average RMSE for length, width and height was approximately +/-1m. In future tests, taking additional measurements will allow us to spot or remove the outliers and then we can look at the MAE (RMSE amplifies and severely punishes large errors) – an average MAE of approximately +/-0.5m was achieved for measuring dimensions of many of the structures. This cannot come close to competing with traditional terrestrial survey or photogrammetric methods in terms of accuracy (and doesn’t pretend to try), but it is important to remember that this was carried out from a desk, with no boots on the ground, was almost completely automated, included nearly every building in Dublin city as an afterthought, can be applied as easily to Dublin as to Durban, and can be repeated as often as required.

**Future work**

Satellite imagery is widely considered to be a tool suitable only for large-scale mapping of environmental variables; however, in this study we have demonstrated the potential of this technology for automated progress monitoring at the building level. We have highlighted the utility of earth observation (EO) satellites by generating a spatially referenced time series of maps, surface models and point clouds – all common datasets essential for any BIM workflow. The full study also looked at satellite radar (high resolution TerraSAR-X, bathymetry, dredging in the bay and time series for 4D BIM). The European Space Agency (ESA) awarded us five Pléiades and five TerraSAR-X, captured over a number of months at four-week intervals; however, we have concentrated on the photogrammetric component only in these articles. A scientific journal paper is in preparation that will go into the methodology in more detail and quantify accuracies of the other outputs, and we will report back at a later date.

**Acknowledgments**

Research in this paper was supported by the Society of Chartered Surveyors Ireland Research Fund and Ordnance Survey Ireland’s Research Initiative. All satellite datasets were provided by the ESA under a Third Party Missions licence and AIRBUS copyright. The authors wish to thank Dublin Port Company and Future Analytics Consulting for the validation datasets provided.

Table 1: Measuring 3D object dimensions with Pléiades tri-stereo satellite imagery.

<table>
<thead>
<tr>
<th>Site</th>
<th>Length [m]</th>
<th>Width [m]</th>
<th>Height [m]</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mean</td>
<td>Std dev.</td>
<td>Actual</td>
</tr>
<tr>
<td>1</td>
<td>33.43</td>
<td>0.49</td>
<td>33.00</td>
</tr>
<tr>
<td>2</td>
<td>29.45</td>
<td>1.14</td>
<td>29.00</td>
</tr>
<tr>
<td>3</td>
<td>29.41</td>
<td>0.49</td>
<td>29.00</td>
</tr>
<tr>
<td>4</td>
<td>124.95</td>
<td>1.08</td>
<td>125.30</td>
</tr>
<tr>
<td>5</td>
<td>33.24</td>
<td>0.95</td>
<td>30.80</td>
</tr>
</tbody>
</table>
Enda McGuane of Winters Property Management in Galway talks about how the market is performing in the city of tribes: “At the moment we’re seeing a significant upturn in Galway in the sense that from a commercial perspective, we’ve a number of fairly significant sites coming on stream. He mentions Bonham Quay in the docks and Ceannt Quarter, an 8.5ac site beside Ceannt Station. Further out he says: “There is also the Crown Square site just outside the city centre in Ballybane and the McDonagh site in Ballybane as well.”

Enda says there is a lot of commercial grade-A office space coming on the market and a certain amount of residential as well. He says that while Galway is a few years behind Dublin, things are starting to happen: “There is a huge demand in the city, particularly from an FDI [foreign direct investment] perspective. The Galway City Innovation District has been very successful and Galway is now viewed as akin to Seattle, or Austin in Texas, in the sense that there is a strong, vibrant arts scene that lends itself to the research and development side of tech companies. It is a place companies like to locate to; people want to live here. There’s a good cohort of educated and skilled staff that attracts businesses and they can come here and scale up.”

Residential
Enda says that the residential market is following behind the office market. He mentions sites in Barna (underway) and Oranmore (planning submitted) outside the city [both of around 200 units] and says there are a lot of smaller sites, some of which are developments that have been left uncompleted since the crash and are being finished off now: “At the moment, there are about eight sites with new homes either on the market or coming to market in the next quarter in Galway”.

Galway faces similar challenges to other cities in that construction costs are rising, the planning process is slow (but improving), and developers and buyers are finding it difficult to access finance.

Transportation
Galway city transportation is about to undergo major changes. A decision by An Bord Pleanála on a €600m ring road is expected this year and a further €250m will be spent improving public transportation and cycling infrastructure in the city says Enda: “The whole essence of the transport plan is to make public transport much more viable across the city.”

**Prices in Galway**
- Average asking price (residential) – €300,457 (up 9.9%) (Daft.ie Irish House Price Report, Q1 2019)
- Average rent – €1,260 (up 11.4%) (Daft.ie Rental Price Report, Q1 2019)
- Average office rent – €323/m²/year (up 9.1%) (Cushman & Wakefield, Galway Office Market, Q1 2019)
Barna houses
197 houses in the village of Barna, just outside the city. First phase is underway by Burkeway Homes on the 18ac site. Phase 1 is expected to go on sale in spring 2020.

Ardstone Homes
Final planning approval has been granted to Ardstone Homes for 88 apartments, along with retail units, on the Western Distributor Road.

Carn
Ard/Gaelcarraig Park
Split development of 80 units has received planning permission. Developed by McHugh Homes, the scheme will comprise 14 houses and 66 apartments.

Bonham Quay
2ac waterfront site will be home to a €100m office development that will accommodate 3,500 workers and create around 400 construction jobs.

Nuns’ Island
€200m investment by NUIG and Galway City Council. A public consultation will consider community, educational, economic, residential, and other uses.

Crown Square site
€200m development – first phase of five office blocks and a hotel approved. Residential and retail phase 2 will be submitted to An Bord Pleanála for fast-track planning.

NUIG
As part of the Government’s Ireland 2040 plan, the University will receive new student residences and other campus upgrades.

Galway ring road
18km ring road will cost around €600m. Has been approved by the Cabinet and An Bord Pleanála will make a decision later this year.

Eastgate
Construction on phase one of this €120m development due to start next year. Will include six office blocks for 1,000-1,500 workers, and a 193-bed hotel.

Merlin Park University Hospital
Proposed site of elective-only hospital. Report by the Saolta University Health Care Group is expected to recommend a 200-bed non-emergency hospital.

Social housing
Galway City Council announced this year that it is on target to provide 1,100 social housing units for the period 2019-2021.

Galway City Innovation District
Close to the city’s main transportation hubs, this will link start-ups, entrepreneurs and others, starting with PorterShed.

Ard Cré
Public housing scheme of 78 units on the Ballymoneen Road is currently under development. It is hoped that the project will be complete by mid 2020.

Cuannt Quarter
Developer Gerry Barrett has been given the contract to develop this prime 8.2ac site beside Cuannt Station into shops, offices, a hotel, and 400 apartments.

Contact
Owen McKenna
ewmckenna@surveysjournal.com
www.surveymagazine.com
The main message from the Land Market Review and Outlook 2019 is that prices for land without a dwelling house, which is probably the best measure of the agricultural value of land, were above those in 2017 (Table 1).

The highest prices and largest changes in price per acre occurred on the smallest parcels, perhaps reflecting the greater affordability of these parcels and interest from purchasers other than farmers. The region with the greatest percentage increase was Connaught/Ulster, but the results for the larger parcels here were from a relatively small number of observations. The trends are summarised in Figure 1. The smallest sized parcel was chosen, as it is the most commonly sold size group.

### Table 1: Price per acre for agricultural land without a residence by parcel size and region, 2018, with % change from 2017.

<table>
<thead>
<tr>
<th>Parcel size (acres)</th>
<th>Leinster (not incl. Dublin)</th>
<th>Munster</th>
<th>Connaught/Ulster</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Price (€/acre)</td>
<td>% change from 2017</td>
<td>Price (€/acre)</td>
</tr>
<tr>
<td>&lt;50</td>
<td>12,929</td>
<td>+19</td>
<td>11,265</td>
</tr>
<tr>
<td>50-100</td>
<td>10,109</td>
<td>+6</td>
<td>10,143</td>
</tr>
<tr>
<td>&gt;100</td>
<td>9,411</td>
<td>+5</td>
<td>10,475</td>
</tr>
</tbody>
</table>

### Table 2: Rental price per acre for land by use and region in 2018 and % change from 2017.

<table>
<thead>
<tr>
<th>Land use</th>
<th>Leinster (not incl. Dublin)</th>
<th>Munster</th>
<th>Connaught/Ulster</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Rent (€/acre)</td>
<td>% change from 2017</td>
<td>Rent (€/acre)</td>
</tr>
<tr>
<td>Grazing/meadow/silage</td>
<td>193</td>
<td>0</td>
<td>192</td>
</tr>
<tr>
<td>Grazing only</td>
<td>188</td>
<td>+3</td>
<td>176</td>
</tr>
<tr>
<td>Cereal crops</td>
<td>207</td>
<td>-6</td>
<td>205</td>
</tr>
<tr>
<td>Roots/maize/pulses</td>
<td>251</td>
<td>-16</td>
<td>229</td>
</tr>
<tr>
<td>Potatoes</td>
<td>346</td>
<td>-19</td>
<td>254</td>
</tr>
</tbody>
</table>

Note: Insufficient observations for rental data for potatoes in Connaught/Ulster in 2017.
Rental prices of agricultural land tend to be more sensitive to changes in returns than purchase prices. Most of the land rented in Ireland is for grassland, plus some for cereals and an assortment of other crops. Rents in 2018 compared with 2017 are shown in Table 2.

There was little change in the rent paid for grassland, either for grazing or preservation, except in Connaught/Ulster, where a large (29%) increase in rental price was reported. This rise was confirmed in some follow-up enquiries and may be due to a shortage of grassland on offer, plus the perception of good long-term rental returns from forestry. There were more pronounced fluctuations in the rental prices for potatoes and other crops, but the weather-dependent yields and returns for most of these crops would explain much of this.

Expectations
Expectations about the types of farmer most likely to be seeking to buy and sell land in 2019 are shown in Tables 3 and 4.

The rental market
Rental prices of agricultural land tend to be more sensitive to changes in returns than purchase prices. Most of the land rented in Ireland is for grassland, plus some for cereals and an assortment of other crops. Rents in 2018 compared with 2017 are shown in Table 2.

There was little change in the rent paid for grassland, either for grazing or preservation, except in Connaught/Ulster, where a large (29%) increase in rental price was reported. This rise was confirmed in some follow-up enquiries and may be due to a shortage of grassland on offer, plus the perception of good long-term rental returns from forestry. There were more pronounced fluctuations in the rental prices for potatoes and other crops, but the weather-dependent yields and returns for most of these crops would explain much of this.

Expectations
Expectations about the types of farmer most likely to be seeking to buy and sell land in 2019 are shown in Tables 3 and 4. The most common type of buyer in all regions was expected to be the dairy farmer. On the other hand, it is drystock farmers who are expected to be seeking to sell. This was the case across all regions.

Table 5: Expectations about types of farmers seeking to lease (take) land in 2019.

<table>
<thead>
<tr>
<th>Type of farmer</th>
<th>Leinster (not incl. Dublin)</th>
<th>Munster</th>
<th>Connaught/Ulster</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dairy</td>
<td>40</td>
<td>50</td>
<td>46</td>
</tr>
<tr>
<td>Tillage</td>
<td>36</td>
<td>32</td>
<td>11</td>
</tr>
<tr>
<td>Drystock</td>
<td>24</td>
<td>18</td>
<td>43</td>
</tr>
</tbody>
</table>

Effects of Brexit
Brexit poses great uncertainty for the agricultural sector. It would be strange if land purchase and rental decisions were not affected by it. The effect of Brexit on buyers of agricultural land is illustrated in Figure 2.

Figure 2 shows that 71% of survey respondents reported that Brexit was having a deterrent effect on buyers of agricultural land. This varied slightly between regions but the effect was always between 73% (Connaught/Ulster) and 79% (Leinster not including Dublin). When the uncertainty is removed, many of these buyers may return to the market but the price they will be prepared to pay for land will depend on the new, but presumably less uncertain, outlook.

In the case of land rental the deterrent effect was much less. In the majority of cases it was said to have no effect either way on rentals. However, the uncertainty was still a deterring factor. For renters, the deterrent effect of Brexit was reported as being present by between 33 and 37% of respondents. It was almost never an encouraging factor.
SERIOUS ABOUT SUSTAINABILITY

THE GLOBAL REAL ESTATE SUSTAINABILITY BENCHMARK CAN HELP INVESTORS AND PROPERTY MANAGERS TO MEASURE THE SUSTAINABILITY OF THEIR ASSETS AND ITS IMPLICATIONS FOR ASSET VALUE AND RISK MANAGEMENT.

On May 9, 2019, Ireland was the second country in the world to declare a ‘Climate and Biodiversity Emergency’. The Irish Government now recognises the need to act on climate change. We are all too familiar with the reasons why climate change is important, but perhaps less so of how it affects investors’ decision-making processes and how it impacts on property asset management.

GRESB

The Global Real Estate Sustainability Benchmark (GRESB) is a global standard for environmental, social and governance (ESG) benchmarking for listed property companies, private funds, developers and investors that invest directly in property. It uses standardised and validated data to assess and benchmark the ESG performance of real estate assets. In 2018, 903 entities from 64 countries with 79,000 properties worth USD$3.5 trillion (USD$1 trillion in Europe) in gross asset value submitted to the GRESB (Figure 1).

Why GRESB?

Investors are increasingly focused on the sustainability of their portfolios and how this aligns with their ESG policies and strategies. Additionally, they want to ensure that their real estate investments are managed efficiently and responsibly, and that there is a programme in place to reduce risks caused by climate change, energy price volatility, water scarcity, evolving customer demands, and changes in environmental legislation across different property types and markets. The impact of such risks on investments is often difficult to understand. The GRESB assessment works like a scorecard, allowing them to view and analyse high-quality sustainability data in a standardised format for an asset, company or a fund.

How does it work?

The GRESB assessment evaluates performance against seven sustainability aspects and contains approximately 50 indicators, ranging from policies to evidence-based data. There are two dimensions to the data submitted – entity (company) level, and asset (property) level. Data submitted is then compared to its peers taking into account country, region, investment type and asset variations. Results are plotted in the GRESB model and a rating from one to five stars is awarded.

The deadline for submission of all data is July 1 each year, and results are available in the first week of September. All submitted data is entered through the online GRESB portal and data is submitted by property sector, such as office, retail, hotel or industrial. The first year of submission to the GRESB is a grace year and the data is not published. This gives companies/funds an opportunity to review their submission and improve in the second year of participation. The data in year two is published through a portal and is visible to investor members.
Aramark has been involved in the GRESB for over two years. From the perspective of a property management agent working with clients on delivery of the GRESB, we have found that the process is quite onerous at the start, and is very data collecting intensive. Engagement with, and some level of understanding of the process by, all parties, such as the client’s representative, building managers, technical advisors, managing agents and tenants, is essential.

Under the stakeholders’ engagement, the GRESB recognises the need to have the top people in a company/fund involved, and specifically asks that a senior decision maker be named, who is accountable for the entity’s strategy and is briefed on ‘sustainability performance of the entity’. Engaging the right people in a company/fund who can make decisions, and set targets and policies relating to sustainability, means that this will be taken seriously across the organisation.

One of the biggest challenges we found that the company/fund faces is the collection of consumption data such as electricity, gas, oil, water and waste from tenants within their portfolios. In order to collect the data, it is essential that tenants are on board. This can be a challenge, especially in single-let full repairing and insuring (FRI)-leased properties where the tenant has full control over the asset. The lease usually does not prescribe for the tenant to hand over their consumption data and, in many cases, tenants will not willingly participate straight away, and generally want to know what is in it for them. If the portfolio submitted to the GRESB consists primarily of single-let properties, and tenants do not engage to provide data, then the portfolio is unlikely to score well.

In order to open the conversation about sustainability, and find ways for mutual benefits between landlord and tenant, tenants’ engagement in the GRESB with property owners and managing agents is a key priority. In modern buildings it is more common to see sustainability clauses included in leases, making it easier to obtain data. The GRESB does, however, recognise the difficulty in obtaining tenants’ data and puts a different weighting on directly and indirectly managed properties.

Building ratings such as LEED, WELL, BREEAM, etc., are important to the GRESB: the more ratings a portfolio has, the better it will score overall. However, the process is not as simple as obtaining, for example, a LEED Design and Build plaque, but then doing nothing for the rest of the building’s life. LEED EBOM (operations and maintenance) and similar for existing buildings, which are awarded during the building’s operations, are also key scoring metrics.

The key to implementing sustainable building policies and strategies is engagement with an active property management company from the outset.

The GRESB and strategic property management

The key to implementing sustainable building policies and strategies is engagement with an active property management company from the outset. To ensure that the process is successful, a property and building manager who not only proactively manages the building’s operations and engages with tenants on a regular basis, but understands the sustainability goals, is essential. With a defined sustainability strategy in place, a building asset can achieve improved health and well-being for all occupiers, and reduce the detrimental impact on the environment as a whole.

Within this article, we have barely scratched the surface of the GRESB. There are many more aspects, such as health and well-being, resilience, and new construction and renovation. For more information, go to www.gresb.com.
Global economic development has enhanced the quality of life and well-being of billions of people. However, inequality is rising, conflict and insecurity are a constant concern, ecosystems are being degraded, resources depleted, and greenhouse gas levels are climbing. These trends are detrimental to communities, environments, businesses and long-term economic prospects.” University of Cambridge Institute for Sustainability Leadership, 2017

When I talk to fellow surveyors and other construction and property professionals, many struggle to connect with “sustainability”. We’re busy running businesses, keeping clients happy, and staying abreast of legislative changes, new standards and professional requirements – all while juggling the many responsibilities of modern life. Many of us barely get time for lunch. Why should we be concerned about sustainability?

The Great Acceleration
The rapid increase in use of worldwide resources known as ‘The Great Acceleration’ began in the 1950s, ushering in the Anthropocene or ‘human’ epoch, where human activity now drives change in the Earth’s systems.

Humanity is now living far beyond the planet’s means, consuming the Earth’s non-renewable resources as if we had one and a half planets to draw upon. What does this mean for business, society and future generations?

100% of our economic activity is dependent on services provided by natural systems. The more we degrade these natural systems, the more, in the end, we imperil economic activity and business success. And while we’re all interested in business success, I don’t know any fellow professional who is not interested in having a world fit and safe for future generations to inhabit.

On current projections, by 2030:
- the global population will increase from 7.7 billion (March 2019) to 8.6 billion (United Nations Department of Economic and Social Affairs, 2017);
- demand for food will increase by 50%;
- demand for energy will increase by 30%; and,
- demand for water will increase by 30%.

There is an interdependency between food, energy, and water; climate change has a significant impact on all three.

Living within planetary boundaries – the global challenges
Keeping global temperatures from rising by more than 1.5°C (IPCC, 2018) will require transforming how the world economy sources and uses energy, with profound implications for society, economies, business and industry. Any less than that will not enable the world to achieve carbon neutrality (zero carbon), which must be achieved to prevent dangerous climate change and ocean acidification. Achieving these goals will require a complete recalibration of the existing economic, energy, and industrial agendas. The world needs to build resilient, zero-carbon economies quickly. This will radically alter some business models and potentially eliminate others. To achieve virtual zero carbon (90% reduction) by 2050 and actual zero (net zero carbon) towards the end of this century we need to:
1. Phase out fossil fuels, increase the use of renewable energy and dramatically decrease greenhouse gas emissions to reduce carbon emissions.
2. Develop the capacity for ‘negative carbon’ emissions (extract greenhouse gases from the atmosphere and store them).

The planet is also facing unprecedented biodiversity loss, coupled with a massive and growing waste crisis.

The critical role of Chartered Surveyors
Property and construction are critical to worldwide sustainability, environment, society and economy:
- buildings and construction account for 36% of global final energy use, and 39% of energy-related carbon dioxide (CO₂) emissions when upstream power generation is included (United Nations, 2017);
- 50% of all materials and energy are used in buildings;
- 33% of all water and waste are used in buildings; and,
- less than 1% of buildings are assessed for sustainability.

Additionally, the property sector is directly and acutely impacted by physical and transitional risks brought by climate change. A 2015 RICS study modelled the potential for increased costs of running a building in eight European countries in commercial buildings that are not retrofitted to address climate risks. The model indicated that by 2050 the total increase in energy bills from 2010 levels for the eight countries would be €457 billion. For Germany, Spain and Greece, the cost would be more than 8% of their gross domestic product (Roberts, 2015). As an industry, we need to focus sustainability at company level, incorporating it into their own operations and sphere of influence.

Many businesses and organisations are already starting to develop innovative solutions.

Key issues for surveyors
- Sustainable construction:
  - circular economy principles and practices;
  - embedding sustainability in design;
  - renewables; and,
  - deep retrofitting of existing buildings (commercial and domestic).
- Sustainable property:
  - green leases;
  - green management;
  - mitigation; and,
  - adaptation.

Vision
For sustainability to become embedded, it needs to become integral to business strategy in its broadest sense, and to pervade what every executive, every manager and every employee does. It needs to be embedded into corporate culture.

Good for business
Increasing numbers of leading businesses, both globally and nationally, have made sustainability more central to their core business activities, aligning it with their long-term vision and values, and their strategic and operational objectives. In the decades that follow, there will be an increase in expectation that organisations will take much more responsibility for addressing these issues in their own operations and sphere of influence. Many businesses and organisations are already starting to develop innovative solutions.

What is your organisation currently doing? What could you as an individual do differently?
- Think about the factors that could disrupt your operations;
- think about how sustainability is positioned internally in your organisation;
- think about your brand’s reputation in terms of sustainability;
- think about how sustainability is currently integrated in the business model; and,
- think about whether your business is, or will be, affected by stranded assets.

“Green building activity continues to grow across the globe, with dramatic increases expected in 20 countries across five continents between now and 2021.” (Design and Construction Intelligence Smart Market Report, 2018)

What could you as an individual do differently?

Future planet
You’re leaving work in 2030. Your children walked or cycled to school in your sustainable community, and you are driven home in your self-driving electric car. When you get home, the car plugs itself in to charge at your house for its peak evening requirements. There is ample fresh, organic food. The beeshives in your community garden are buzzing with activity. You head over to the community garden to pick fresh salad for dinner. Your neighbourhood is safe and secure. The fear of global collapse and environmental catastrophe has been averted. Isn’t this something to aim and work for – together?

Bibliography
IPCC. Global Warming of 1.5%. 2018.
AEEBC IN DUBLIN

Pictured at the recent Association of European Experts in Building and Construction (AEEBC) Conference in Dublin were (from left): Kevin Sheridan, Secretary General, AEEBC; Áine Myler, Director General, SCSI; Pat Nestor, Senior Building Surveyor, Dublin City Council; and, Frank Keohane, building surveyor and conservation specialist.

MIXED ACTIVITY IN COMMERCIAL PROPERTY

The SCSI’s Annual Commercial Property Report – Review & Outlook 2019 shows mixed activity levels for 2018 across office, retail and industrial property. While the mood of commercial estate agents and their clients across the country is generally optimistic, there are clear challenges and concerns facing prospects for 2019 and beyond. The Report, which is based on responses to a survey of SCSI members across Ireland, looks at each sector of the commercial market, including office, retail, industrial, development land, and residential investment.

In the office sector, the Report says that average rents are expected to continue to grow in 2019, with the rate of growth in Dublin versus outside Dublin varying depending on the type of property. Shortages of suitably sized, suitably located and modern offices were the dominant factors impacting on the market in 2018, each ranked in the top three factors by between 50% and 60% of respondents. Over half of respondents expect supply to increase in 2019, and at the same time over 40% expect vacancy rates to fall, suggesting a buoyant market.

In the retail sector, online retail and low tenant demand were the dominant issues highlighted by agents for 2018. Just under half of respondents expect the fashion sector to be most affected by the growth of online sales, with one-third expecting the household goods sector to be most affected. The dominant view for 2019 is that in most market segments, supply and demand will be equal. In secondary city centre streets, supply is expected to exceed demand.

In the industrial sector, the dominant issue highlighted by respondents for 2018 was the shortage of modern stock (ranked in the top three factors by 95% of respondents) followed by unsuitably sized stock and unsuitably located stock. The expected change in industrial rents for all types of units in 2019 was higher outside Dublin than in the capital, with an increase of 6.8% expected in prime rents compared to a little over 6% in Dublin. Supply is expected to fall short of demand for logistics units and for prime units. For secondary units, the dominant view is that supply and demand will be equal.

The majority of respondents reported that the supply of development land had increased in 2018, ranging from 50% in Connaught-Ulster to 58% in Dublin and the rest of Leinster. In the rest of Leinster (excluding Dublin), increases in development land values outpaced other regions in both the residential (16%) and retail (6%) sectors. Almost 60% of Dublin respondents expect supply to be less than demand, rising to 70% in Connaught-Ulster. In Munster, 40% of respondents expect supply to exceed demand. Development land values are expected to increase nationally for all types during 2019, the highest being residential land at 8%.

In all sectors, a soft Brexit was seen as a key factor that would assist business in 2019, largely due to the uncertainty that it has created.
SOCIETY SUBMISSION ON ANTI-EVictions BILL

The SCSI has made a submission to Government on proposed amendments to the Residential Tenancies Act, and proposed measures to be introduced via the Anti-Evictions Bill.

In its submission, the Society acknowledges the Department of Housing, Planning and Local Government's efforts to tackle the housing and homelessness challenge. However, it raises concerns regarding possible worrying consequences if the proposed measures are implemented in their current form.

In recent years, the SCSI has reported on why landlords are exiting the private rental sector, including legislative and regulatory changes that have resulted in uncertainty and complexity. In its submission, the Society expresses concern that further changes to regulations will mean many more investors may leave the market. The Society recommends a fundamental overhaul of legislation that sets a vision for a mature rental market, where security of tenure underpins long-term investment strategy, where responsibility for repairs and costs are matched against a long-term lease; in short, a rental market that is fair to both landlord and tenant. The submission contends that neither Bill contributes to the long-term vision and strategy needed to properly develop the residential rental sector.

Ireland needs small investors in areas outside the main urban centres where large institutional investors do not perceive operational scale or value; the proposed changes and further regulation will only exacerbate the problem.
MEET THE TEAM IN MERRION SQUARE

Ami Shirreffs
Ami joined the SCSI team as Front of House and Member Support Administrator in April of this year. She graduated from Dublin Institute of Technology in 2016 with a BA in Visual Merchandising and Display Design. Since then she has worked in customer-focused roles in various industries including retail, hospitality and property management. Ami has gained experience in sales, as a brand manager and, more recently, as an executive assistant. She is the first point of contact for all members of the public and SCSI members, and is available to help with any general queries about the SCSI, upcoming events and membership. Her role is based front of house and involves managing calls, greeting visitors, directing members to meeting rooms, and ensuring that the office is running smoothly. If you have any queries or thoughts on the SCSI, she would be happy to speak with you by phone or on your next visit to Merrion Square.

SAVILLS TRIUMPH AT TAG RUGBY

Well done to team Savills, winners of this year’s SCSI Tag Rugby Tournament. Over 20 teams entered this year’s competition, which is quickly becoming the social event of the summer. Pictured are Ciaran Keegan (far left) and Catherine Connolly (far right) of the SCSI, with the winning Savills team (from left): Billy Flynn; Graham Quinn; Sean Ryan McAffrey; Ben McArdle; Roisin Lenehan; Philipp Von Matuschka; Hugh Herity; Andrew Thompson; James O’Rourke; and, Gregor Potterton.

MONITORING THE MARKET

Pictured at the launch of the SCSI/PwC Construction Market Monitor were (from left): Charles Mitchell, SCSI QS Chair; Edward McAuley, Head of Practice and Policy, SCSI; Joanne Kelly, Head of Real Estate, PwC; Sinead Lew, Senior Taxation Director, PwC; and, Donal O’Neill, Ardstone Capital.
The Assessment of Professional Competence (APC) is the last cliff on the climb to becoming a Chartered Surveyor. APC candidates spend a minimum of 24 months training for their final assessment. Only after they have gone through the set APC process, and satisfied a panel of assessors that they have the required competencies (i.e., skills), will they be awarded the coveted ‘Chartered’ status.

Eloise Heron is a Chartered Valuation Surveyor who often assesses candidates on the valuations pathway of the APC and in other connected areas. She has been working as an assessor for about five years and says the role is rewarding: “One of the biggest benefits is networking with peers, and keeping good connections going outside of typical work scenarios where you might normally be competing against different firms. It’s nice that you can work with fellow Chartered Surveyors and regardless of where you come from or what company you’re in, you’re working together for the same important purpose”.

Eloise says there is a lot to be gained from helping young surveyors: “We learn new skills ourselves because we’re keeping up to date with the latest property issues ... There’s also a feel good factor because you’re helping out the next generation”.

Advice for candidates
Over her time as an assessor, Eloise has seen what it takes to complete the process successfully. First of all, she says candidates should be careful about choosing their employer: “They need a supportive one to make sure they get all the experience that they need and that they choose the right competencies in the process”.

In the final assessment, Eloise says that assessors are looking for candidates who have achieved their competencies to the level that they had committed to and that they have a good, well-rounded knowledge of the property sector: “Well rounded is important because it’s not just a narrow pathway. You have to have good all-round exposure as well. We need to feel that that person would be a safe pair of hands if they became chartered”.

Eloise says she sees many candidates rushing into the final assessment: “Generally they are applying a little bit too early. I think the important thing might be to say that the 24-month minimum is in fact a minimum, not a target. Take your time until you’re confident and you’ve covered enough areas”.

Assessing the assessors
Eloise has recently trained as a monitor to the APC: “I’ll be monitoring the interview assessment process on behalf of the SCSI, which adds another layer of quality assurance to the process. I think it will help the candidates to achieve a fair and consistent experience because that’s what we all want, that it’s consistent. A recent addition is that the SCSI is getting more monitors involved”.

Eloise says becoming an assessor is worth the extra work it takes: “The whole thing is quite positive. Even though it does take up a bit of time, it’s a good thing to do”.
Building materials account for half of the solid waste generated every year worldwide. Construction and demolition waste (CDW) is the largest waste stream in the EU. In 2007 (peak of the last construction boom), over 18 million tonnes of construction waste was produced in Ireland. To put that in context, every house and business in Ireland combined produced 2 million tonnes of waste that year!

Certifications such as LEED encourage proper management of construction debris. The EU Waste Framework Directive (2018/2008/98/EC) clarifies the definition and use of construction and demolition waste for backfilling, as well as increasing focus on waste prevention. However, lack of standardisation, low margins, poor policy push, lack of awareness and lack of resources are all barriers.

By 2025, the world will generate two billion tonnes of construction waste annually.
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