

BiGGAR Economics

An Integrated Economic Development Strategy for South Dublin County

A final report to
South Dublin County Development Board

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1 SUMMARY

This is an economic strategy and action plan for South Dublin County. It is designed to guide partner actions to drive the development and growth of the economy over the next ten years.

The South Dublin County economy has performed extremely well since the early 1990s. Resident and business population, employment, educational attainment, inward investment and investment in infrastructure have all grown strongly while unemployment has fallen significantly. There remain areas of severe deprivation.

The County appears to be as well placed as most parts of Ireland to return to a growth trajectory when national and global economic conditions improve. This document sets out actions targeted at areas of opportunity and challenge that will support future sustainable economic growth.

There is consensus among private and public stakeholders that future aspirations for the County are:

- a vibrant, dynamic and innovative place;
- an economy with strong growth where businesses and workers thrive;
- a socially integrated place with opportunities for all and a high quality of life;
- a green and sustainable place;
- a place that is easy to get to and around.

The vision for the County is as:

South Dublin: the Connected County

There are four strategic priorities underpinning this vision:

- 1) business infrastructure to facilitate growth – ensure that sufficient land is made available for business over the next 20 years and that first rate supporting infrastructure is developed in order that the County remains competitive as a location for business;
- 2) growth sector development – explore sectors in which activities in the County could grow, generating wealth and employment opportunities: business and leisure tourism, energy, digital economy, environmental resources, healthcare, logistics, aviation;
- 3) access to improving opportunities and services for all – ensure that all County residents are able to take advantage of improving learning and employment opportunities and services;
- 4) improved image, raised profile and heightened sense of place – develop an identity and image for the County and raise its profile regionally, nationally and internationally.

The actions to deliver these strategic priorities are designed to be achievable and largely within the control of partners working at a County or more local level.

This document has three principal sections: economic strategy, action plan and the evidence base underpinning the strategy and action plan.

2 INTRODUCTION

This is an economic strategy document for South Dublin County prepared by BiGGAR Economics for South Dublin County Development Board.

2.1 Study Objectives & Work Programme

The Board commissioned BiGGAR Economics to develop an integrated economic strategy for South Dublin as an action under 'A Place for People' – the Integrated Strategy for the Economic, Social and Cultural Development of South Dublin County, 2002 – 2012.

The integrated economic strategy will help drive the economy of South Dublin County over the next ten years. It will be action oriented, largely within control of partners and in line with national economic development policies and programmes.

We have developed this draft strategy through:

- review of relevant data and documents;
- discussions through face to face interviews and a workshop session with representatives of South Dublin County Development Board members, all of which were invited to participate in the process.

We circulated an issues paper in advance of the workshop which focused upon opportunities, challenges, actions and aspirations for South Dublin. We prepared a draft strategy following the workshop and finalised this taking account of comments received.

2.2 Report Structure

This report is structured into three parts:

- section 2 – economic strategy;
- section 3 – action plan;
- section 4 – evidence base.

The strategy and action plan are based upon the evidence base, which provides strategic & economic context, strengths and weaknesses. Three appendices support the evidence base:

- appendix A presents feedback from the workshop session;
- appendix B summarises principal strategies within which the new strategy fits;
- appendix C provides greater depth of economic data.

3 ECONOMIC STRATEGY

This economic strategy has been developed from the evidence base gathered through consultation, workshop and information review. It is structured as follows:

- | |
|-----------------------------|
| 3.1 – Aspirations; |
| 3.2 – Vision; |
| 3.3 – Drivers; |
| 3.4 – Opportunities; |
| 3.5 – Challenges; |
| 3.6 – Strategic Priorities. |

3.1 Aspirations

There is consensus that future aspirations for the County are:

- a vibrant, dynamic and innovative place;
- an economy with strong growth where businesses and workers thrive;
- a socially integrated place with opportunities for all and a high quality of life;
- a green and sustainable place;
- a place that is easy to get to and around.

3.2 Vision

The vision for the County is as:

South Dublin: the Connected County

The County as a connected place will have a number of different dimensions, including:

- transport & communications: physically well connected with good transport infrastructure, good public transport and communications infrastructure required for a knowledge economy, including telecommunications;
- at the Dublin level: an important part of the Dublin city regional economy, attracting residents and businesses;
- at the national level: good working relationships with national government and its agencies;
- collaboration: agencies and social partners working well together at the County level and engaging with residents and businesses;
- networks: strong and effective business networks; and
- connecting everyone: an economy with access to opportunities for all.

3.3 Drivers

The drivers of future economic success in South Dublin County will come from a number of sources including:

- existing strengths of South Dublin County;
- international and national macroeconomic trends, including the international competitiveness of Dublin city region;
- development of growth sectors; and
- investment and actions under national and regional strategies.

Specific opportunities, and challenges that need to be overcome, have been identified and are summarised below.

3.4 Opportunities

Opportunities	Comment
<p>1. employment land availability and affordability</p>	<p>The availability of land and premises is one of the key factor conditions for growth in any economy. One of the most important advantages of the County in the past has been the availability of employment land, in the fast-growing Dublin city region economy, that can be developed without undue delay (in terms of site servicing and securing planning) and at a relatively competitive cost. This has facilitated the development of business parks and industrial estates to service the indigenous market and has attracted significant foreign direct investment (FDI).</p> <p>The County has an opportunity to take a long term, 20 year view, of employment land need, ensuring that sites are brought forward for FDI and for growth of indigenous firms. Grange Castle has been a very successful strategic site for FDI in the County, and around 200 of its 475 acres now remain. There is now an opportunity to begin the process with the IDA of identifying and assembling the next strategic site of similar scale (up to 500 acres) for the County. There is also an opportunity to bring forward land for indigenous business development to a similar scale.</p> <p>The County will remain an attractive place for businesses to locate in, start-up and grow if it maintains a steady supply of land and other business infrastructure that meets business needs and the costs of operating a business in the County are kept down. The continued availability of affordable land for employment will ensure that the County remains in a position to benefit from FDI attracted to Ireland, the growth of the Dublin regional economy and the growth of existing businesses.</p>
<p>2. labour market</p>	<p>The availability of a skilled, flexible workforce is also a key factor condition for growth. The labour market conditions in the County provide a basis for growth across all sectors.</p> <p>The County has the third largest population in the country (after Dublin city and Cork) and is part of the Dublin regional labour market, which represents a large pool of educated workers from which County businesses can draw. The Dublin labour market comprises over 629,000 people, and over 206,500 people over 15 are educated to degree level or higher. It is served by four universities and two national colleges which have over 52,000 students per year enrolled.</p> <p>The County also has a track record of providing training that meets the requirements of new and growing sectors (for example, training developed by 3rd level educational providers such as the Institute of Technology Tallaght (ITT) for the ICT (Information & Communication Technology) and pharma sectors). Ensuring that education and training is targeted at growing sectors, at all educational levels, will provide the basis for growth in existing companies and could help to attract additional investment to the County, as will sustained actions on upskilling the existing workforce.</p>
<p>3. national knowledge economy priority</p>	<p>The national economic development strategy stresses the importance of the knowledge economy in generating both indigenous growth and as a source of inward investment. Sectors that have been particularly targeted (for example, by Science Foundation Ireland) are ICT and biotechnology.</p> <p>South Dublin County is well placed to benefit from this national strategic priority, as a result of:</p> <ul style="list-style-type: none"> - existing sites likely to be attractive to ICT and biotechnology investors (including the National Digital Park and Grange Castle) - investment by high profile companies in ICT and biotechnology (for example, Xilinx and Wyeth) - the availability of appropriately skilled staff (for example, graduates of ITT Dublin and other higher education institutions in the wider region) - access to the research facilities in the Dublin city region

Opportunities	Comment
4. entrepreneurship	Greater entrepreneurial activity will contribute to a growing and dynamic local economy. There is an opportunity to encourage this through programmes delivered in schools and further education within the County, as well as through initiatives and support for those considering starting their own business.
5. a regional airport at Baldonnell and aviation-related development	<p>The Air Corps is based at Casement Aerodrome at Baldonnell. Should the Government agree to the opening up of the airfield to non-defence uses, there could be the potential to develop a second Dublin airport serving a regional market or possibly for a freight market (to build on the County's existing attractiveness as a logistics and distribution centre). The development of commercial airfields alongside defence airfields is common across Europe. George Best Belfast City Airport (which was previously a military site and a test site for Shorts/ Bombardier) shows what could be possible. Weston Airport is a unique facility serving the corporate and private markets which contributes to the attractiveness of the County as a location for international businesses and high level business investment.</p> <p>Should a commercial airfield develop at Baldonnell (or if there is further development at Weston airport), there could be scope for aviation-related development. Such development might include some or all of the following:</p> <ul style="list-style-type: none"> - aerospace manufacturing, supply chain and servicing operations (similar to the International Aerospace Park near Glasgow Prestwick Airport, for example) - airport related services including training schools, airline operations and airport and aviation services similar to Cork & Shannon airports - consolidate the position of existing aviation based businesses in the county, for example Lufthansa Airmotive Ireland and PWAI - investment by companies not related to the aviation sector but for whom co-location with an airport is preferred (such as the development of the Edinburgh Park business park and the Royal Bank of Scotland headquarters near Edinburgh Airport).
6. development at and around Baldonnell airfield	Casement Aerodrome at Baldonnell is located to the west of Citywest and the National Digital Park, to the south of Grange Castle Business Park, to the east of Greenogue/ Aerodrome Business Parks and north of Baldonnell Business Park and is also situated close to the development of new towns and residential communities at Adamstown and Clonburris. Any under-utilised land at the airfield itself or in the vicinity would therefore be attractive for development as employment sites (the agreement of the Government would be required for the development of lands within the airport whilst the development of adjoining lands outside the Aerodrome should be encouraged as it is at other Aerodromes).
7. energy sector	<p>The energy sector has come under close scrutiny in all developed economies as a result of climate change and the recent increases in costs of oil and other fossil fuels. As well as being a challenge for the global economy, these circumstances provide an opportunity for the development of new sub-sectors, focused on renewable energy. While energy generation has not historically been a large contributor to the South Dublin County economy, these circumstances mean that there is an opportunity to change this.</p> <p>An energy group has already been formed to look at opportunities for investment in renewable energy in the County. Specific opportunities might include wind energy and geo-thermal energy. An audit of energy consumption patterns in the County is also being conducted currently. The need to conserve energy and use energy more carefully could create market opportunity for companies involved in developing and supplying energy saving technologies (e.g. insulation).</p> <p>The opportunity in the energy sector is related both to providing a secure and affordable energy supply to a local market and to the County becoming a base for renewable energy and other energy related companies – developing a business park for companies involved in energy generation and energy saving could facilitate this.</p>

Opportunities	Comment
8. environmental resource sector	<p>Environmental concerns have also focused on waste and are resulting in new business opportunities. While the traditional waste sector may have been seen as unattractive for economic development (given the historic emphasis on landfill), the sector is becoming increasingly attractive as the focus moves to reducing and recycling waste.</p> <p>Given that many of the policy levers that are important to the sector are within the control of the County Council, there is also an opportunity to establish effective partnerships between the public and private sectors to improve the green credentials of the County and to facilitate and encourage the growth of an indigenous waste and recycling sector. There could be opportunities for the County in 'industrial ecology' – the ecologically based process of material and energy reuse and recovery across industrial and commercial sectors.</p>
9. logistics and distribution sector	<p>The distribution sector has not been seen as a priority sector due to its reputation for providing relatively low value and low density employment. However, South Dublin County's location and improving transport infrastructure make it an attractive location for logistics and distribution companies. The opportunities in this increasingly sophisticated sector include high value and hi-tech operations that require much more than warehouse based accommodation.</p>
10. business tourism sector	<p>South Dublin County is a well established and growing location for business tourism. The Citywest Hotel & Conference Centre may be the largest combined four star hotel and conference centre in Europe. Several new hotels have opened in recent years, serving both the regional Dublin business visitor market and providing venues for meetings and conferences. The business tourism sector is expected to continue to grow with plans for investment including a new conference centre, and ever improving connectivity to Dublin city centre and airport.</p>
11. leisure tourism sector	<p>The County has potential to develop as a leisure tourism location for a number of reasons:</p> <ul style="list-style-type: none"> - the development of the business tourism sector has provided facilities, such as hotels, that are also available for leisure tourism (including, for example, at weekends where business tourism demand is lower) - the location of the County, close to Dublin city, provides a rural leisure location for city residents, including access to the Dublin Mountains - the location of the County, close to Dublin and well connected to the west and south of the country, providing a base for leisure visitors wishing to tour the country - the potential to build on and develop specific leisure and heritage tourism attractions in the County (golf, fishing, country trails, a new tourist attraction for Tallaght (e.g. an aviation museum, a science museum for children, or a university museum), the Hellfire Club building on Montpelier Hill. A group is already developing ideas for a new Tallaght tourist attraction - the canals running through the County are a resource of high potential leisure and tourism value which could be developed over the longer term

Opportunities	Comment
12. healthcare sector	<p>The County is already home to an important regional hospital (Tallaght) as well as other health facilities (for example Peamount and Hermitage hospitals). There are opportunities for the further development of the health related sector in a number of ways:</p> <ul style="list-style-type: none"> - further investment in hospitals and other healthcare facilities, from the public and private sectors - the link between the healthcare and biotechnology sectors (for example, by the development of clinical research) - suppliers to healthcare providers - the development of the 'wellness' sector, providing products and services that promote good health and well-being (for example the development of a spa/ health hotel) - accommodation and care centres for the elderly that would complement existing residential areas of the county
13. sport sector	<p>There is an existing sports and leisure sector in the County including the GAA sports and facilities such as the National Basketball Arena and Tallaght Athletics Track (recently upgraded to Olympic standard). The Tallaght stadium was recently awarded €2.75 million government funding which will see it completed and will house Shamrock Rovers football club. These facilities present an opportunity for the further development of this sector, which could also contribute to the raising of the County's profile. For example, there could be an opportunity to market the County as a location for teams training for the 2012 Olympics.</p>
14. social enterprise	<p>There exist opportunities to encourage and invest in the development of social enterprises in the County to deliver community services such as recycling, care, and training & re-skilling for the unemployed. These address social and economic need, and could be encouraged in a number of ways, for example, by raising the profile of social enterprise through events, and creating a centre of social enterprise excellence and network of talented people operating in or supportive of social enterprise.</p>
15. gateway to County at Red Cow	<p>While the Red Cow junction may have been considered to be a problem or constraint due to traffic congestion, the recent and on-going investment in the 'busiest junction in Ireland' provides an opportunity to create a 'gateway' to the County that could help to address the identified weakness of the County in terms of low awareness and profile. There is an estimated 35 acre space that could be redeveloped here. A park and ride facility at the Red Cow Luas Station is located in this area. The Naas Road Urban Design Masterplan currently underway by South Dublin County Council will set out a blueprint for the development of this area.</p>
16. traditional industry moving out from the city	<p>There are several traditional industries, including food and drink, that are based in an urban environment in traditional industrial premises that have a need to modernise and rationalise if they are to survive. This may require relocation from within the M50 rim to areas outside the M50 that have strong road and infrastructural links.</p> <p>There is an opportunity for South Dublin County to provide such companies with a location where such modernisation can take place, close enough to the city for companies to retain a large proportion of their existing workforce and have access to a large labour market. Retention of such businesses is important – they support employment and maintain the diversity of the local economy.</p>
17. international profile and image of Ireland and Dublin	<p>Ireland generally and Dublin specifically have developed enviable international reputations as places to do business and the growth of the 'Celtic Tiger' economy is well known. This provides a good basis for attracting tourism and investment to the County. Strategy & initiative development and investment to drive the international competitiveness of Dublin city region will benefit the South Dublin economy.</p>

3.5 Challenges

Challenges	Comment
1. planning land use for the long term	<p>In a growing County like South Dublin there will always be competing pressures in the use of land to allow for residential development, business development, leisure and social use while maintaining the rural aspects of the County. While there is existing zoned and undeveloped employment land, care must be taken to ensure that one of the County's most important comparative advantages is not lost.</p> <p>The availability of affordable employment land will be achieved by taking a long term (at least twenty year) view of employment land requirements to ensure sufficient supply and a competitive market. There will be a challenge to the County Council in developing the new County Development Plan to identify sufficient employment land to meet the County's long term needs.</p> <p>The changing requirements of city centre based businesses that require to relocate outside the M50 will require the provision of sufficient additional employment land.</p>
2. education and skills in the workforce	<p>While educational attainment levels in the County have been improving and have reached national averages, the proportion attaining higher level qualifications is below the regional average.</p> <p>There is a need to continue to improve educational attainment and the spread of subjects covered in the curriculum to ensure that:</p> <ul style="list-style-type: none"> - the skills required by the growing and changing economy are available - all of those who live in the County have the education levels and skills to fully participate <p>The challenge for the County will be to work with the national agencies responsible for education policy to ensure that the County's education needs are met.</p>
3. Baldonnell	<p>While development centred on Baldonnell provides a range of potential opportunities, the aerodrome and existing safety & security restrictions on development imposed by the Department of Defence could be a constraint on economic growth in the County since:</p> <ul style="list-style-type: none"> - one of the most promising areas of the County for new employment sites would not be available - several potential drivers of growth would be lost
4. transport infrastructure	<p>There have been significant improvements in transport infrastructure in the County in recent years. However, further investment is required and there would be concern if the current economic and fiscal conditions led to any changes in the existing commitments to the implementation of the Transport 21 proposals in the County.</p> <p>There is also a specific issue related to cross County transport (particularly public transport) since the transport routes have developed on a radial basis in and out of the City. The weak cross County linkages have a number of impacts:</p> <ul style="list-style-type: none"> - the size of the local market for service businesses is smaller than it otherwise would be - the size of the local labour market is smaller than it would otherwise be - the County is less cohesive than it would be if its residents were more used to travelling around the County, beyond the towns and communities where they live

Challenges	Comment
5. image and identity	<p>As a young County, “South Dublin” is not a well recognised entity locally (where residents are more likely to identify with the town they live in or with Dublin as a city) or externally (where there may be confusion with the south side of the city of Dublin).</p> <p>The low level of awareness of South Dublin does matter and is about more than civic pride. It means that attracting investment, residents and tourists to the County is more difficult than it would be if people and businesses knew where it was and what it could offer.</p>
6. retaining existing industries seeking new premises	<p>The County has a number of well established industrial sites with traditional industries, several of which have been identified for re-development – including some that will be identified for non-industrial uses.</p> <p>These businesses are important employers and there will be a challenge to identify alternative suitable premises for them to relocate to within the County.</p>
7. ‘volume’ and ‘knowledge intensive’ jobs growth	<p>The County needs to exploit every opportunity for employment growth – ‘volume’ jobs for a growing local population are as important as ‘knowledge intensive’ jobs – and sectors such as business and leisure tourism, retail and logistics are important in this respect.</p>
8. availability of statistics and intelligence on economy	<p>There is a lack of reliable, timely information on economic and social conditions in the County. This is potentially a problem for both public agencies and potential private sector investors – if they are not working on the basis of reliable information, they might make the wrong decisions.</p>
9. competing counties	<p>There is recognition that, as part of the Dublin city region and Ireland, the County is competing with regions across Europe and the wider world. However, there are also local competitors for investment, residents and visitors.</p> <p>South Dublin County has done well as the Irish economy as a whole has grown. However, there will be a challenge in continuing this growth and maintaining competitiveness relative to other neighbouring counties. Fingal is seen as the main competitor due to the scale of development planned for the airport region, the growth of towns and resident population, the extent of land available for industrial development, and its location within the Dublin to Belfast corridor.</p> <p>This increasing competition means that ‘more of the same’ may not be enough – South Dublin County will need to raise its game to maintain its competitiveness.</p>

3.6 Strategic Priorities

Four strategic priorities for South Dublin County result from consideration of these opportunities and challenges:

- 1) business infrastructure to facilitate growth – ensure that sufficient land is made available for business over the next 20 years and that first rate supporting infrastructure is developed in order that the County remains competitive as a location for business;
- 2) growth sector development – explore sectors in which activities in the County could grow, generating wealth and employment opportunities: business and leisure tourism, energy, digital economy, environmental resources, healthcare, logistics, aviation;
- 3) access to improving opportunities and services for all – ensure that all County residents are able to take advantage of improving learning and employment opportunities and services; and
- 4) improved image, raised profile and heightened sense of place – develop an identity and image for the County and raise its profile regionally, nationally and internationally.

Actions which partners can take to contribute to these strategic priorities are described in the Action Plan.

4 ACTION PLAN

This section sets out actions which partners can implement to contribute towards meeting the County's strategic priorities.

Actions targeted at the opportunities and challenges and that can transform the South Dublin economy in the coming years will involve:

- building on existing strengths;
- addressing weaknesses;
- factoring conditions for growth and prosperity, including:
 - place – a competitive physical business infrastructure;
 - people – a skilled, flexible workforce; and
 - business – entrepreneurial and innovative businesses.

The strategy (and its actions) does not constitute an operational document for individual partners in the County. Rather, partners will need to commit to the strategy and to its implementation, and to integrate its strategic priorities and actions into their own business or operational plans where relevant.

The strategy contains practical actions that local partners can take, rather than being a call to action by others (such as national government departments or agencies). In this way, the delivery of the strategy is largely within the control of local partners.

Actions are presented in the table below along with a brief rationale for them. Their relative priority is indicated at this stage as Short-run (SR) or Medium-run (MR), with SR actions being for immediate consideration and delivery between 2008/09 and 2010/11, and MR actions for delivery over a longer time horizon. The partners who may deliver the actions are also listed.

The South Dublin County Development Board should take the lead in implementing the Action Plan, and in reviewing progress against it. This could be done through progress update reports and formal meetings every six months. A full and formal review of progress against strategic priorities and actions should be undertaken after three to five years.

Action	Rationale	Timeframe	Partners
Short-run: SR Medium-run: MR			
Strategic Priority 1 – Business infrastructure to facilitate growth			
1.1. Ensure that the new County Development Plan takes a long term view on land and services, providing sufficient land for indigenous business development and a new strategic site of scale for FDI	A new County Development Plan that defines a balanced and appropriate mix of land uses to meet the needs of residents and businesses over the long term will provide the required framework through which actions contributing to the sustainable development of the County can be taken.	SR	County Council
1.2. Develop investment propositions for the County as a location for business and a place offering a high quality of life	A set of propositions for key sites with which partners can market South Dublin to the IDA, potential investors and companies will be useful in encouraging development and investment in the County, and ensuring that a constant stream of employment space is developed.	SR	South Dublin Chamber of Commerce, County Enterprise Board, County Council, site owners, IDA
1.3. Review the cost competitiveness of the County as a place to do business and take actions if appropriate to alleviate cost (e.g. on local taxation)	The County faces tough competition to attract and keep business (from other Irish counties and globally), so actions which make it more cost competitive are likely to have a positive impact.	SR	County Council, South Dublin Chamber of Commerce
1.4. Ensure that a 'ladder' of premises from incubator space through grow-on to mid-sized enterprise space is developed to house start-up, small and growing indigenous and relocating businesses	Ensuring that appropriate premises are available for new and young businesses is important in fostering indigenous firm formation and growth and supporting an enterprise culture.	MR	County Enterprise Board
1.5. Ensure that appropriate support is provided to start-up, young and innovative companies, to assist them to grow and prosper	As with premises, ensuring that the right support and advice for new and young businesses is available is important in fostering indigenous firm formation and growth and supporting an enterprise culture.	MR	County Enterprise Board
1.6. Work with and support firms to ensure their retention in the County	The County needs to retain its businesses to maintain employment levels in the County. Actions are required to support them to stay in the County, for example facilitating their relocation to new premises.	SR	County Council, South Dublin Chamber of Commerce, County Enterprise Board, FAS
1.7. Develop close and positive relationships with utilities and service providers in the County	This will help to ensure that quality infrastructure can be put in place at the right time to unlock industrial zoned land for development.	MR	County Council, ESB, Telcos, site owners

Action	Rationale	Timeframe Short-run: SR Medium-run: MR	Partners
Strategic Priority 2 – Growth sector development			
2.1. Engage with the Department of Defence on safety and security restrictions on development at Baldonnell, with a view to easing them for potential economic development gain.	Development of this strategic site in the heart of the County for aviation-related or general business purposes could bring significant economic benefits to the County.	SR	Chamber of Commerce, Department of Defence, County Enterprise Board, County Council
2.2. Complete the County energy audit and develop and implement actions to address opportunities	There could be real opportunity for the County to establish itself as a leading location in the alternative energy sector. Decisive and speedy actions to exploit opportunities could bring long term employment and other related benefits.	SR	Development Board Economic Development Working Group, South Dublin Chamber of Commerce
2.3. Develop propositions for other potential growth sectors – e.g. tourism, environmental resources, healthcare, logistics, digital economy – which sell the County to potential investors	On top of actions strengthening the County's competitiveness as a general business location, development of cluster activity in particular growth sectors will be valuable in driving growth and raising County profile.	SR	Development Board Economic Development Working Group, Enterprise Ireland, South Dublin Chamber of Commerce
2.4 Define, develop and promote the County's tourism offer	Clarity on the County's tourism offer – e.g. business tourism & events, 'gateway location', golf, other leisure activities & the Dublin Mountains – supported by consistent branding, marketing and product development will help to grow tourism and build County profile and identity.	SR	South Dublin County Tourism, Chamber of Commerce, County Council
2.5 Develop a new tourist attraction for Tallaght	A new attraction in Tallaght, such as a children's museum, will bring people into the County, give Tallaght a new focus for visitors and community, and raise profile.	MR	South Dublin County Tourism, County Council, South Dublin Chamber of Commerce
2.6 Transform the Dublin Mountains into a recreational asset accessible for residents.	The Mountains are a neglected backdrop to the County currently which could play a far greater role in tourism and the lives of residents. Appropriate developments could bring significant health and recreational benefits.	MR	South Dublin County Tourism, County Council
2.7. Develop networking groups and action plans in key growth sectors	These could be valuable in driving activity and helping to establish and grow the sectors in the County.	MR	Development Board Economic Development Working Group, Enterprise Board, South Dublin Chamber of Commerce

Action	Rationale	Timeframe Short-run: SR Medium-run: MR	Partners
Strategic Priority 3 – Access to improving opportunities and services for all			
3.1. Engage with transport authorities and operators with a view to improving public transport services	Better public transport provision between communities, towns and employment locations within the County will help residents without cars to access employment opportunities and services.	SR	County Council, Irish Rail, Dept of Transport, RPA, Dublin Bus
3.2. Influence the development of a wide mix of housing that meets existing needs and attracts people to the County	Development of the right mix of housing by type and tenure will contribute to the health and sustainability of communities and will encourage new people to settle in the County.	SR	County Council, Local Development Companies, Community organisations
3.3. Build the availability of third level education in the County through the development of outreach facilities	Improving the accessibility of third level education across the County will help to raise participation levels and ultimately improve the educational and skills base of residents, benefiting individuals and employers.	MR	County Council, ITT Dublin, Local Development Companies
3.4. Develop integrated education and skills plans, upskilling the workforce	Building on current pilots, these will better link workplace skills requirements and opportunities to educational courses and training, helping to deliver people with the right skills to employers and improve the employment prospects of residents.	MR	ITT Dublin, South Dublin Chamber of Commerce, Local Development Companies
3.5. Continue to take action to address barriers (e.g. lack of childcare) that prevent residents taking up employment opportunities	Increasing the accessibility of job opportunities for residents will improve life for those who want to work but are currently constrained and expand the productive labour resource of the County.	MR	Local Development Companies, County Council
3.6. Develop and encourage the enterprise agenda – including social enterprise – in schools, third level education providers and communities	Effective actions which inspire people to consider self employment – such as talks by local entrepreneurs – will contribute to raising the rate of entrepreneurial activity in the County.	MR	County Council, schools, County Enterprise Board, ITT Dublin, Local Development Companies
3.7. Continue to invest to improve infrastructure and services in the County's communities, particularly in its most disadvantaged areas	Without sustained investment in disadvantaged communities they will continue to be left behind.	MR	County Council, Local Development Companies, Community organisations

Action	Rationale	Timeframe	Partners
Short-run: SR Medium-run: MR			
Strategic Priority 4 – Improved image, raised profile and heightened sense of place			
4.1. Develop an identity and a brand for South Dublin County which reflects its assets and aspirations	An identity and a brand will help define the County and its offer and provide partners with a common tool with which to promote the County, raise its profile and change perceptions.	SR	County Council, all partners
4.2. Adopt and use the County identity and brand in all materials, and run a well resourced and sustained publicity campaign	Widespread use of the brand and its incorporation into all marketing and promotional materials developed by public and private sector partners is essential if the County's profile is to be raised and perceptions are to change. Such change will take time and the marketing campaign needs to be sustained and well funded to achieve this.	SR	County Council, all partners
4.3. Engage with, lobby and influence decision-makers and key officers in national and regional government departments and agencies	Being proactive on all fronts will secure benefits for the County, raise its profile, and ensure that its needs are reflected in the future strategies of e.g. IDA, transport, education and skills, and Enterprise Ireland.	SR	County Council, all partners
4.4. Work with Dublin city region partners on international branding and marketing for Dublin and ensure the prominence of South Dublin County assets in these campaigns	Improving the competitive advantage of Dublin city region will benefit the County and enable it to showcase itself internationally as a location for inward investment and a focal point for science, ICT and innovation in the Dublin city region.	MR	County Council, Dublin city region partners

5 EVIDENCE BASE

The strategic and economic context on which this strategy has been built is summarised below.

5.1 Strategic Context

The new economic strategy addresses the needs of South Dublin but needs to fit with and contribute to the current strategies of government and its agencies at the national, Dublin city region (Dublin City, South Dublin, Dun Laoghaire-Rathdown County and Fingal) and South Dublin County level.

At the national level these include the overarching National Development Plan 2007-13, National Spatial Strategy 2002-20 and Towards 2016 Social Partnership Agreement 2006-15, as well as the strategies and policies of government departments and agencies including Forfás, Enterprise Ireland, IDA Ireland, FÁS and Science Foundation Ireland.

Taken together, principal strategic objectives include:

- competitiveness, productivity and wealth – moving the Irish economy into higher value added activities while developing and maintaining international competitive advantage by:
 - raising education and skills levels;
 - improving transport, ICT and business infrastructure;
 - keeping down the costs of doing business in Ireland;
 - conducting more R & D, commercialisation and innovation;
 - growing employment, particularly in higher value adding occupations.
- sustainable development and social inclusion:
 - ensuring everyone accesses and shares in the opportunities from growth – and that growth is ‘polycentric’ rather than over-concentrated in the Dublin City Centre region;
 - developing sustainable communities that meet population needs (new housing, mixed communities; retail, leisure, culture and services infrastructure; reducing environmental footprint).

There is an opportunity for the four Dublin counties to work together with national government departments, agencies, business groups and other institutions on a strategy and actions to boost Dublin city region’s international competitiveness. Integrating and marketing the business, people and place ‘offer’ across the Dublin city region, and developing synergies and economies of scale, for example in growth sectors and between universities, institutes of technology and business, could drive up competitiveness.

South Dublin County will benefit from the investment, wealth and employment which will result from improved Dublin city region competitiveness, and it will also offer the County an opportunity to showcase its own particular strengths and assets – for example as a centre of science, ICT and innovation within the Dublin city region.

At the South Dublin County level the strategy has been developed to fit with the objectives of, and be embraced by, South Dublin County Development Board members:

- South Dublin County Council;
- local development agencies including South Dublin County Enterprise Board and the CPLN and Tallaght Partnerships;
- social partners including South Dublin Chamber;
- state agencies represented on the Board.
- Community and voluntary bodies.

The strategy reflects the Board's current integrated strategy for the economic, social and cultural development of South Dublin County 2002-12, 'A Place for People', whose vision is:

'A county confident in its sense of identity, creating social, economic and cultural inclusion for all and providing access to lifelong learning and health services to support self-sustaining development. The county we envision will be environmentally friendly and based on the values of equity, creativity, participation and inclusiveness.'

It takes cognisance of the eight specific area themes and four cross-cutting themes of 'A Place for People', and of its many key priorities, strategic goals and objectives.

5.2 National Economic Situation

Ireland is experiencing a downturn. Projections¹ suggest a contraction of -1.3% of real GNP in 2008 and of -0.7% in 2009 (down from an average real GDP growth of around +5% per year since 2002), caused by various factors:

- slowing domestic demand, driven by the housing sector downturn;
- international 'credit crunch';
- inflation in international energy, commodity and food prices;
- reduction of export activity;
- loss of export competitiveness (devaluation of the US\$ and UK£ against the EURO€);
- loss of business and consumer confidence.

This is translating into job losses (expected to fall by 14,000 & 47,000 respectively in 2008 & 2009) and rising unemployment (expected to average 6.1% and 8% respectively in 2008 & 2009). Inflation is anticipated to fall from 4.5% in 2008 to 2.0% in 2009, on the assumption of a European Central Bank interest rate of 3.25% by the end of 2009.

¹ Quarterly Economic Commentary Autumn 2008 – Economic & Social Research Institute Ireland – October 2008

The medium-term outlook for Ireland remains positive, however, with a return to an average growth rate of GNP of 3.75% forecast for the period 2008-15². This is based on potential growth of productivity, development of the labour force and the resilience and flexibility of the Irish economy to adverse circumstances.

The strategy needs to take account of the short-term economic difficulties and challenges, but look beyond them to the medium-term.

5.3 South Dublin Economic Situation

5.3.1 Overview

South Dublin County has performed extremely well since the early 1990s to become a growing and successful County hardly recognisable to that of the 1970s and 1980s. It grew strongly during the last two decades in line with the 'Celtic Tiger' years of boom experienced across Ireland (real GDP growth of 6 – 11% per year during 1994-2000, and 4 – 6% per year during 2001 – 06²).

Resident and business population, employment, educational attainment, inward investment and investment in infrastructure have all grown strongly in South Dublin County since 1991 while unemployment has fallen significantly. There remain a number of communities which exhibit multiple deprivation, however, which have not fully benefited from the years of growth.

As the global and Irish economies have entered a period of reduced growth and 'realignment', so has the economy of South Dublin County. The County appears to be as well placed as most parts of Ireland to return to a growth trajectory when national and global economic conditions improve.

Most recent data available at the South Dublin County level tends to relate to 2006³ or earlier. While not completely up to date, it provides a useful picture of the County and its performance relative to other parts of Ireland.

5.3.2 Population

- almost 250,000 and projected to exceed 265,000 by 2011;
- third largest county in Ireland by population after Dublin City and Cork County – 5.8% and 20.8% respectively of the Irish and Dublin city region populations;
- population growth since 1991 when it was under 210,000 of 18%, faster than Dublin city region average (16%), but slower than Ireland average (20%);
- approximately 62% in the south of the County (south of the Naas Road) – 153,000 and 38% in the north – 94,000;
- rapid population growth in the north of the County (double the national average), set to continue with new housing developments such as at Adamstown – projected new town of 25,000;

² Medium-term Review 2008-2015 – Economic & Social Research Institute Ireland – May 2008

³ 2006 Census, CSO, and reports interpreting it – POBAL 'GAMMA' reports – Trutz Haase Consultants and Socio-Economic Demographic Profiles for South Dublin County, North & South of the Naas Road – the Nurture Programme

- relatively young population and relatively low and falling age dependency rate – 29% of population aged under 15 or over 65, similar to Dublin city region and lower than Ireland (31%);
- relatively low proportion of residents classed by professional, managerial or technical occupations – 32% compared to nearly 36% across Dublin city region.

5.3.3 Labour Force

- growing labour force of over 131,000 in the County, and its location means that workers are drawn from the much larger Dublin city region labour force of 629,220;
- high labour force participation rate – 68% of residents aged 15 and over, compared to Dublin city region (65%) and Ireland (62.5%);
- unemployment – approximately 11,237 claimants in Tallaght & Clondalkin offices in October 2008, representing an increase of 60% on the 7,039 claimants in October 2007⁴;
- unemployment rates⁵ in South Dublin County in 2006 higher than Ireland averages for men (7.9% compared to 7.5%) and women (7.5% compared to 6.7%);
- higher level education – low rate of residents with degree or higher level qualifications – under 16% or 30,160 people, similar to the Irish average, but well below the Dublin city region average of over 21%, which represents a pool of 206,508 over 15 year olds educated to this level in the Dublin city region;
- student & graduate pool – the County draws from a Dublin city region labour force served by four universities and two national Colleges. These have over 42,000 full-time and 10,700 part-time students⁶;
- other education – highest level of residents: 13% primary; 16% lower secondary; 25% upper secondary; 9% non-degree;
- entrepreneurship & self employment – difficult to conclude whether this is increasing or decreasing⁷ for South Dublin. Nationally, Ireland is relatively entrepreneurial (7.4% of adults are contemplating starting or have started businesses – 3rd highest in the EU⁸).

5.3.4 Sectoral Employment

- almost 120,000 residents employed in 2006, concentrated in services and balanced across several sectors:

⁴ CSO Live Register Analysis October 2008

⁵ the unemployed as a proportion of those aged 15 and over at work or unemployed, Census of Population, 2006

⁶ Higher Education Authority statistics for 2006-07 for University College Dublin, Trinity College Dublin, National University of Ireland Maynooth, Dublin City University, National College of Art and Design, Royal College of Surgeons Ireland.

⁷ South Dublin County Incubation Centre Feasibility Study – BiGGAR Economics, 2006

⁸ Entrepreneurship in Ireland in 2006 – Global Entrepreneurship Monitor, 2007

- wholesale & retail – 19,700 (17%);
- real estate, renting and business activities – 12,800 (11%);
- manufacturing – 12,600 (11%);
- construction – 11,200 (9%);
- health & social work – 10,700 (9%);
- transport & communications – 8,500 (7%);
- banking & financial services – 7,400 (6%);
- education – 6,800 (6%);
- hotels and restaurants – 4,860 (4%), which combined with parts of other sectors such as retail, confirms tourism as a sector of growing employment importance for the County;
- relative to Dublin city region, more employment in wholesale & retail and transport & communications, and less employment in banking & financial services and other business activities;
- increasing absolute and relative employment in service sector;
- growing and potential growth sectors identified as: biotechnology, pharmaceuticals, metals and engineering, ICT, hospitality, transport and logistics (South Dublin is the logistics hub for Dublin city region), internationally traded services, business, tourism and financial services.

5.3.5 Deprivation

- several communities in South Dublin exhibit multiple socio-economic deprivation, for example:
- three ‘very disadvantaged’ EDs: Tallaght-Killinarden, Clondalkin-Rowlagh & Tallaght-Avonbeg;
- six ‘disadvantaged’ EDs: Tallaght-Fettercairn, Clondalkin-Cappaghmore, Clondalkin-Moorfield, Terenure-St James, Tallaght-Tymon & Tallaght-Springfield;
- these areas are characterised by:
 - high proportions of single parent families;
 - low educational attainment;
 - high unemployment, low employment and low occupational ‘class’ profile;
 - high concentrations of local authority housing.

5.4 Business & Business Infrastructure

- estimated 6,377 companies in the County with 39 industrial estates and 46 business parks where 2,241 firms are located;

- high profile employers committed to the County e.g. Xilinx, Johnson & Johnson) in growth, knowledge sectors and prestigious business parks (e.g. Grange Castle, Citywest (home to the National Digital Park));
- approximately 362 hectares (894 acres) of zoned, undeveloped industrial land in South Dublin County in 2007⁹;
- however, consultees suggested that as much as two thirds of such zoned land may not be 'available'¹⁰. This includes Grange Castle – reserved for large inward investment opportunities, Citywest – which has user restrictions, and various locations with undeveloped expansion land;
- most developed industrial land is in the east of the County – Tallaght, Clondalkin, Ballymount & Bluebell; much of the undeveloped land lies in the west of the County – Grange Castle, Citywest, Greenogue and Baldonnell;
- industrial land use traditionally dominated by warehousing¹¹ (44%) – with industrial (35%), office (10%) and retail/ retail warehouses (4%);
- trend of slightly more office development in the County since the mid 1990s, reflecting growth of services over manufacturing activities, albeit from a very low original office base.

5.5 Transport Infrastructure

- ongoing improvements to the roads network, including M50 widening, improvements to the N4 & N7 and intersection enhancements;
- LUAS light rail linking Tallaght to the centre of Dublin and due to extend to Citywest;
- Metro West proposals – to link Tallaght to Dublin airport via Clondalkin and Lucan – advancing;
- Quality Bus Corridors, park & ride and cycle route initiatives progressing.

5.6 Community Infrastructure

- ongoing need for new housing of all types including social and affordable, to meet needs of growing and changing population;
- approximate 11 year supply of land zoned for residential development currently, based upon a current average rate of development of 29 hectares per year;
- over €700 million of development projects underway or completed under the Tallaght and Clondalkin Integrated Area Plans, including a high proportion of the almost 4,000 new residential units anticipated; over €15 million invested in

⁹ draft (unpublished) Land Use Survey – South Dublin County Council Planning Dept, 2007

¹⁰ consultees suggested 'available' land may be of the order of 250 acres (100 hectares) after subtracting these areas

¹¹ Land Use Survey – South Dublin County Council Planning Dept, 2001

community infrastructure/ projects in addition to new Arts Centre for Tallaght¹²;

- Adamstown Strategic Development Zone – over 1,300 units under construction and almost 800 units occupied; development of train station, road, school and other community infrastructure ongoing¹³;
- ITT Dublin – approximately 2,200 undergraduates & 80 postgraduates (50% from within County), 350 employees, rapidly expanding activities, strong industry links & wide industrial training programme, range of enterprise services and performing well, increasing research income;
- Tallaght Hospital – incorporating the National Children’s Hospital was Ireland’s biggest healthcare project, approx 2,600 fte employees, delivers wide range of services across most specialisms to residents of south-west Dublin and beyond, plans for further on-site infrastructure development. Other healthcare assets in the County include Peamount Hospital near Adamstown, a centre of excellence for health and social care, and the private Hermitage Medical Clinic, Lucan.

5.7 Strengths & Weaknesses

Consultations conducted to inform the strategy and discussions at the strategy workshop suggest strengths and weaknesses of South Dublin County as described below. These reflect the economic data in describing the County as a completely changed place today from that of two decades ago which has a range of assets on which to build prosperity over the next two decades.

5.7.1 Strengths

Strength	Comment
1. Location	South Dublin County has an excellent location next to the city of Dublin - the driver of the Irish economy - and gateway to the west and south of Ireland. There is therefore a large amount of economic activity happening in, next to and passing through, South Dublin (facilitated by the N4, N7, N81 and M50). This brings significant opportunity for businesses and residents in South Dublin and encourages investment into the County.
2. Transport infrastructure	Transport infrastructure is improving steadily, serving to better connect the County’s businesses and residents to opportunities, and improving its relative competitiveness as a location for business. Improvements include: <ul style="list-style-type: none"> - LUAS light rail from Dublin centre to Tallaght, set for extension to Citywest; - M50 widening, improving connections to Dublin Airport; - proposed MetroWest Tallaght – Clondalkin – Lucan airport link; - Kildare route (electrification of commuter train route); - ‘A’ road improvements within the County, quality bus corridors, park and rides and cycle routes developing.

¹² Development Plan 2004-10 Two Year Progress Report – South Dublin County Council Planning Dept, 2006

¹³ <http://www.adamstown.ie/>

Strength	Comment
3. Young and growing population, high participation rate	A growing population and workforce can support greater investment in infrastructure and services including health, education, retail, leisure and cultural facilities, as well as providing workers for the County's businesses.
4. Large and skilled workforce	In addition to the resident labour force, the County's location enables its businesses to draw workers from a large, skilled labour pool covering Dublin and neighbouring counties.
5. Business infrastructure	The County is well supplied with business parks and industrial estates, including high profile ones such as Citywest and Grange Castle. There has been widespread office development to accommodate increasing demand from service businesses. Service infrastructure (power, ICT and water) throughout the County is good.
6. Prominent, committed companies	Major international companies such as CRH and Henkel Technologies have established large presences in the County, raising its profile as a good place to locate, and demonstrating commitment to the County.
7. Institute of Technology Tallaght Dublin	ITT has grown and developed rapidly, educating residents and developing strong links with employers. It is delivering graduates with the skills required of business, and is also growing its research activities and range of enterprise services.
8. Tallaght Hospital	The hospital delivers a wide range of services across most specialisms to residents of south-west Dublin and beyond, and has plans for further on-site infrastructure development.
9. Dublin Mountains	These provide an attractive backdrop and boundary to the County and are an under utilised tourism and recreation asset.
10. Good Business Location	Apart from becoming the transport and logistics hub of the Dublin city region, the County has developed as a good all-round location for business, rather than one that is concentrated on particular sectors. Its location, accessibility and lower costs (relative to Dublin City) have helped to attract in businesses which are increasingly involved in services.
11. Growth Sectors	The County has the facilities to enable growth in knowledge intensive sectors such as biotechnology and ICT, and potentially to establish itself further in alternative energies and tourism.
12. Sport infrastructure	The National Basketball Arena brings a national focus to the County and is a valuable events and recreation venue. Investment in the Tallaght Stadium and the proposed relocation of Shamrock Rovers there is another positive.
13. Common Agency Administrative Boundaries & Partnership Working	Delivery of initiatives to encourage/ facilitate economic development is assisted by the fact that major partners share the common County boundary and are used to working together.

5.7.2 Weaknesses

Weakness	Comment
1. Lack of identity, outdated image, low profile	Only formed in 1994 as an administrative area, South Dublin County has a lack of profile and identity. There may be a lack of awareness of where exactly it is – people may confuse it with neighbouring parts of southern Dublin. There may be an outdated and negative perception of Tallaght/Clondalkin, which has improved immensely over the last two decades, or of the area as a ‘backwater’. The County is not famous for anything in particular, and does not have a brand or marketing campaign that is raising its profile. Having ‘Dublin’ in its name could be a strength because it’s an internationally famous name or a weakness because it’s seen as an ‘adjunct’ to Dublin – a place without its own identity.
2. Areas of high socio-economic deprivation	There are several communities in the County which continue to struggle and do not appear to have shared in the benefits of the growth of the last two decades. They are characterised by high unemployment, low educational attainment, relative poverty and social problems.
3. Poor Public Transport services cross County	It is difficult to get around the County by public transport. Bus services are infrequent and many employment locations are not well served by them. This hinders the ability of those without cars to take advantage of job and other opportunities.
4. Availability of land for business	A good supply of land for business has been a strength of the County in recent decades which has helped make it attractive as a location for business. There is concern now that the County’s future development could be constrained if a long term supply of land for business is not provided – for FDI and indigenous businesses.
5. Lack of community identity and cohesion	The towns and communities of South Dublin may not have the sense of community or identity enjoyed by other parts of Ireland. This could be because much of the population does not have strong roots in the County – they or their families have moved there in current or recent generations, which can impact upon social cohesion.
6. In-commuting of higher occupational ‘classes’	The higher occupational ‘classes’ tend to live outside the County, narrowing the social mix of communities in the County and implying ‘leakage’ of worker spend out of the County.
7. Housing mix	There is a concern that the current housing mix may not be meeting housing needs – in particular that there is too high a proportion of apartments relative to family houses.
8. Retail underperformance	The County is ‘under-trading’ – formerly a net importer of retail spend, it is now a net exporter. This appears due to changing expenditure patterns rather than a shortage of retail space (which has continued to be developed). The Square is currently undergoing a €20 million refurbishment.
9. Limited ability to effect and implement change	There is recognition that many actions require to be taken at a national or regional level – the South Dublin County partners may have limited powers or resources to implement them.

APPENDIX A – WORKSHOP FEEDBACK

A workshop was held on the morning of 10th July 2008 at the Louis Fitzgerald Hotel with the aim of identifying and prioritising the main opportunities and challenges for the economy of South Dublin County. Members of the South Dublin County Development Board and its sub-committees were invited to attend, and the agenda for the workshop included:

- Introduction & Objectives for Workshop;
- Setting the Scene – Strategic & Economic Context;
- Strengths & Weaknesses of South Dublin County;
- Opportunities & Challenges;
- Prioritising Opportunities & Challenges;
- Actions for realising Opportunities & overcoming Challenges;
- A Vision or Theme for the Strategy.

A number of opportunities and challenges were identified and then prioritised. This was done by asking each workshop participant to vote five times for the most important opportunities and challenges (participants could give all five votes to one opportunity or challenge or one or more votes to up to five opportunities and challenges).

The most important opportunities identified (with numbers of votes in brackets) were:

- employment land availability and affordability (17)
- training for a changing economy (16)
- national knowledge economy priority (13)
- Baldonnel (13)
- energy sector (10)
- tourism sector (9)
- health sector (9)
- ICT sector (7)
- waste sector (6)
- gateway to County at Red Cow (6)
- traditional industry moving out from the city (5)
- aero-related sector (5)
- HQ and front office investment (4)
- profile of Ireland internationally (3)

- potential size of labour market (2)
- rural industry technology facilities (2)
- financial sector outsourcing (1)

The most important challenges identified (with numbers of votes in brackets) were:

- planning land use for the long term (32)
- educational levels and spread (14)
- Baldonnel (14)
- large numbers of lower skilled in workforce (10)
- cross-County transport (10)
- transport – if Transport 21 proposals not implemented (10)
- image and identity (9)
- retaining existing industries seeking new premises (8)
- recent population net out migration (7)
- availability of statistics and intelligence on economy (6)
- communication of key policies to the wider resident population and business community (6)

The workshop discussion then focused on actions that would be required to realise the opportunities and meet the challenges. During this discussion it was clear that there were some issues which were a matter for national policy (but which organisations in the County should seek to influence) and some issues that were largely within the spheres of control or influence of County based organisations.

Suggested actions included:

- ensuring that the County Development Plan takes a long term view on land and services
- ensuring good relations with utilities and service providers
- influencing national and regional strategies and priorities
- developing investment propositions (including for key sites such as City West and key sectors)
- engagement with transport authorities and operators
- ensuring availability of 3rd level education (e.g. by the development of outreach facilities)
- developing integrated education and skills plans, building on existing pilots
- ensuring wide housing mix
- action to develop brand and identity, well resourced

- identifying leisure tourism draw
- ensuring Dublin mountains access
- complete energy audit and take forward opportunities identified

In terms of the overall vision for the strategy, there was a high degree of consensus on what South Dublin County should be aiming for. Participants were asked to answer the question: what would you like South Dublin County to be known for in 10 years time? As shown below many of the answers had similar themes.

What would you like South Dublin County to be known for in 10 years time?

“The business and industrial engine of Dublin”

“A green industry County – high employment, schools looking ahead to industry, Green Industry Business Park”

“Sustainability with effective use of land for housing, jobs, food production, energy”

“Opportunities for new businesses – forward thinking attitude and proactive approaches”

“A sustainable, vibrant County which is attractive in terms of residential and economic opportunities and provides appropriate levels of access to quality infrastructure (including open space), jobs and communities”

“Full employment, excellent social integration, good public transport, good facilities for young and old, low local government costs and strong economic growth”

“Knowledge based local economy in Dublin city region with good transport and mobility links”

“South Dublin have won three-in-a-row (Sam Maguire Cup)”

“A County which provides good quality employment opportunities and where one can reside with a good quality of life”

“A good place to live, work and get around”

“A place where people can live and work with a high quality of life and excellent public transport links”

“Stronger identifiable image which centres on a combination of high tech and pharma business allied to a strong leisure, conference and tourism venue”

“As having the lowest unemployment and highest labour market participation rate in Ireland”

“A full employment County with above average GDP per capital, with no very disadvantaged areas”

“An attractive place in which to live and work”

“Dynamic, innovative economic hub”

“Good place to live, work and visit”

“High technology and innovation in the provision of goods and services”

“Dynamic regional economy that is seen as an interesting place to live, work and visit”

“The centre of excellence for biotechnology in the British Isles”

“Business innovation”

“A knowledge economy”

“Biggest convention centre in Ireland”

“Hotspot of technology based enterprise and entrepreneurship”

APPENDIX B – STRATEGIC CONTEXT

Strategy	Purpose	Priorities & Objectives
Ireland National Development Plan 2007 – 2014	€184 billion investment framework integrating strategic development frameworks for regional development, for rural communities, for all-island co-operation, and for protection of the environment with common economic and social goals.	<p>The five investment priorities identified are:</p> <ul style="list-style-type: none"> • economic infrastructure (€54.7 billion); • enterprise, science and innovation (€20.0 billion); • human capital (€25.8 billion); • social infrastructure (€33.6 billion); and • social inclusion (€49.6 billion).
Towards 2016; A Ten-Year Framework Social Partnership Agreement 2006 – 2015	Sets out a vision for Ireland focusing on social and economic policy.	<p>The key foundations of the vision are a dynamic, internationalised, and participatory society and economy with a strong commitment to social justice, where economic development is environmentally sustainable and is internationally competitive.</p> <p>This will be achieved by:</p> <ul style="list-style-type: none"> • nurturing the complementary relationship between social policy and economic prosperity • developing a vibrant, knowledge-based economy; • re-inventing and repositioning Ireland’s social policies; • integrating an island-of-Ireland economy; and • deepening capabilities, achieving higher participation rates and more successfully handling diversity, including immigration.
National Spatial Strategy, 2000 – 2020	Provides a framework for achieving more balanced social, economic, physical development and population growth between regions.	<p>It aims to achieve a strong balance of social, economic, physical development and population growth between regions to sustain:</p> <ul style="list-style-type: none"> • a better quality of life for people; • a strong, competitive economic position; and

Strategy	Purpose	Priorities & Objectives
		<ul style="list-style-type: none"> • an environment of the highest quality. <p>The approach focuses on five things:</p> <ul style="list-style-type: none"> • economic role of Dublin and other regions as much of Ireland's recent prosperity has been generated in Dublin; • improve the quality of life through building economic and residential opportunities to reduce the travel to work distance; • accommodate Ireland's growing population within existing settlements; • promote planning to renew, consolidate and develop existing cities, towns and villages; and • implement policies and programmes which are consistent with the NSS to enhance and build up economic and social activity within the national framework provided by the NSS.
<p>Forfás Enterprise Strategy Group - 'Ahead of the Curve', 2004</p>	<p>Provided an analysis of Ireland's recent and current enterprise performance and the global context in which it is operating, along with strategic priorities for the future of enterprise development in Ireland.</p>	<p>Three priorities emerge:</p> <ul style="list-style-type: none"> • increasing shift towards services as the driver of GDP growth; • greater role for knowledge in innovation and economic development; and • higher value-added manufacturing as a key component in the economy. <p>Objectives for achieving these priorities include:</p> <ul style="list-style-type: none"> • facilitating access to export markets; • encouraging R&D and technology application; • attracting foreign direct investment; • fostering entrepreneurship; and • training for the labour market.

Strategy	Purpose	Priorities & Objectives
Transforming Irish Industry 2008 – 2010, Enterprise Ireland Strategy	Strategy focusing on assisting the development of Irish firms to become globally competitive in order to impact on national and regional prosperity.	<p>The vision is to drive Irish industry to a new level of international performance and profile. It has four over-reaching strategic objectives:</p> <ul style="list-style-type: none"> • new export sales: achieve €4 billion new sales; • in-company R+D spend: increase companies meaningfully engaged in R+D (>€100,000 per annum) to 800 and increase companies engaged in significant R+D (>€2 million per annum) to 55; • new high potential start-ups (50% outwith Dublin): increase to 200 (by 100); and • growing companies of scale: 15% increase (635) in number of clients with annual global sales of €5 million and 20% increase (225) in clients achieving €20 million.
Tomorrow's Skills; Towards a National Skills Strategy Forfás 2007	Outlines a skills strategy for the future towards 2020.	<p>This outlines four priorities for future skills strategies:</p> <ul style="list-style-type: none"> • systematic identification of the needs of individuals and enterprises; • flexible and responsive training provision; • a high profile national media awareness campaign; and • an accreditation / quality assurance system. <p>It outlines three goals that by 2020:</p> <ul style="list-style-type: none"> • 48% of the labour force should have qualifications equal to NFQ levels 6 – 10; • 45% should have qualifications at NFQ levels 4 and 5; and • the remaining 7% will have qualifications at NFQ levels 1 to 3.
Strategy for Science, Technology and Innovation, 2006 - 2013	Provides a strategy so that "Ireland by 2013 will be internationally renowned for the excellence of its research, and will be to the forefront in generating and using new knowledge for economic and	<p>Central priorities are to:</p> <ul style="list-style-type: none"> • double the output of PhDs by 2013; and • build a sustainable system of world class research teams across all disciplines. <p>Objectives include:</p> <ul style="list-style-type: none"> • building critical mass in existing research teams;

Strategy	Purpose	Priorities & Objectives
	social progress, within an innovation driven culture.”	<ul style="list-style-type: none"> • maintaining world class standards in research; • upgrading of existing, and provision of new, research infrastructure; • more effective, development of high-quality, researchers e.g. through attractive funding opportunities, shorter PhD duration, increased completion rates; • multi-disciplinary environment where quality-led researcher training can take place; • transfer of knowledge from the research base to the market place; and • increase in trans-national collaboration in research, particularly on an ‘all-island’ basis.
Transport 21, 2006 - 2015	Capital investment framework for the transport system in Ireland to increase use, capacity, accessibility and sustainability.	<p>The main objectives are:</p> <ul style="list-style-type: none"> • to create a high quality, efficient national road and rail network consistent with the objectives of the National Spatial Strategy; • to provide for a significant increase in public transport use in provincial cities; • to strengthen national, regional and local public transport services; • to enhance safety and security facilities at the regional airports. <p>Main objectives for the Greater Dublin area include:</p> <ul style="list-style-type: none"> • to develop Metro North and Metro West; • to extend the LUAS network to the Docklands, Citywest, Bray and construct a new line from St Stephen’s Green to Liffey Junction and from Lucan to the City Centre; • to develop the bus network to create a meshed network of services and reorient it to take account of the rail developments described above; • to create a network of interchange points to allow ease of transfer; • to develop park and ride facilities at carefully chosen locations; • to complete the upgrade of the M50.

Strategy	Purpose	Priorities & Objectives
<p>South Dublin: A Place for People, 2002 - 2010</p>	<p>Ten-year economic, social and cultural development strategy for South Dublin County, whose vision is:</p> <p>A County confident in its sense of identity, creating social, economic and cultural inclusion for all and providing access to lifelong learning and health services to support self-sustaining development. The County we envision will be environmentally friendly and based on the values of equity, creativity, participation and inclusiveness</p>	<p>There are eight themes:</p> <ul style="list-style-type: none"> • a Cultural Place – concerned with building an inclusive cultural community taking pride in heritage; • an Economically Competitive Place – implementing a strategy to create greater economic opportunities and develop resources; • a Learning Place – developing an educational system which is inclusive and offers the best opportunities to children, recognising their contribution; • a Place to Protect – sets out to protect the environment and promote sustainable development; • a Healthier Place – promotes healthy lifestyles, families and communities; • a Place to Live – promotes a range of accommodation to meet needs, encouraging the adoption of well-maintained homes; • a Connected Place – providing excellent infrastructure to meet social and economic needs; and • a Safe Place – enhances and maintains safety and security of people. <p>And a further four cross-cutting themes:</p> <ul style="list-style-type: none"> • an Informed Place – this theme relates to information sharing to enable a coordinated approach (supported by two priority actions); • a Collaborative Place – this theme is concerned with developing networks and integrated approaches to County issues (supported by four priority actions); • a Place for Everyone – this theme seeks to raise living standards and promote social inclusion by ensuring investment is targeted in the most disadvantaged areas; and • an Equitable Place – the final theme is concerned with promoting equality (both this and “a place for everyone” are supported by four priority actions).

Strategy	Purpose	Priorities & Objectives
South Dublin County Development Plan 2004 – 2010	Sets out South Dublin County Council policies and objectives for the period	<p>The main priority is to sustainably develop and improve the social, cultural, environmental and economic assets of the County.</p> <p>Objectives include:</p> <ul style="list-style-type: none"> • facilitate greater sustainable economic development and employment opportunities; • develop sustainable communities and a high quality built environment by reducing travel time, improving transport links and encouraging the efficient use of land; • develop and design high quality residential zones; • promote social inclusion; • build a stronger retailing sector; and • promote easy access to local infrastructure.
South Dublin County Council Corporate Plan 2004 – 2009	Outlines the strategic direction for South Dublin County Council for the period	<p>Its priorities are:</p> <ul style="list-style-type: none"> • connecting with communities; • a dynamic organisational structure; • an economically competitive place: attract major economic investment; promote the County as a centre of excellence for R+D; maximise opportunities for its citizens; assist in the development of telecommunications infrastructure; and • create a high quality and sustainable living environment: increase affordable housing; promote the 'polluter pays' principle. <p>Its cross cutting themes are:</p> <ul style="list-style-type: none"> • promote an equitable and inclusive County; social inclusion is the core issue to be addressed, especially with the pressure of society becoming more diverse; • develop a sustainable County; defined as “development that meets the needs of the present without compromising the ability of future generations to meet their own needs”;

Strategy	Purpose	Priorities & Objectives
		<ul style="list-style-type: none"> • work towards a collaborative County; have strategic alliances with organisations, agencies and the local community which share the same goals; and • a customer focused organisation; provide citizens and customers with the highest quality of service in an economic, efficient, effective and equitable manner.
South Dublin County Enterprise Board Strategy	Strategy to lead local enterprise development.	<p>The four priorities were:</p> <ul style="list-style-type: none"> • develop and support local entrepreneurship and enterprise and to stimulate the creation of employment within South Dublin County through: • training for new and existing entrepreneurs; • funding for new and existing businesses; and • technical support for new and existing businesses e.g. mentoring, incubation. <p>With objectives to achieve this:</p> <ul style="list-style-type: none"> • encourage sustainable employment creation in the micro-enterprise sector; • play an active role in the economic development of South Dublin County; • provide clear leadership and authority in the broader field of enterprise development field; • help integrate the activities of state and voluntary agencies with regards to micro-enterprise development in the County; and • help build the long-term capacity of local enterprise and development/ support groups.

APPENDIX C – ECONOMIC CONTEXT

This section sets out economic indicators for South Dublin County contrasted with those of the Dublin city region area (Dublin, Fingal, Dun Laoghaire-Rathdown and South Dublin) and Ireland.

Ireland had real GDP growth of 6 - 11% during 1994-2000, and 4 – 6% during 2001 – 06¹⁴. The Dublin area has the highest gross value added (GVA¹⁵) per head of all Irish regions. In 2005¹⁶ GVA per person at basic prices was €48,580 in the Dublin area compared to €34,468 nationally. In Dublin this was up from €16,962 in 1995.

Population, employment and educational attainment have all grown strongly in South Dublin County since 1991 while unemployment has fallen significantly. There remain a number of communities which exhibit multiple deprivation, however, which have not fully benefited from the years of growth.

Population

The current population of South Dublin County is 246,935 and it has increased by 3.4% since 2002. This represents 5.8% of total population in Ireland and places South Dublin County as the third most populous county after Dublin City and Cork County. By 2011 the population is expected to exceed 265,000. This population change since 2002 of 3.4% is below that of Dublin city region (5.7%) and Ireland (8.2%). Since 1991, the County's population has risen from under 210,000 by 18.3% compared to the Dublin city region (15.8%) and Ireland (20.3%).

There are large differences in population growth within the County - for instance Tallaght growth of 7.2% in contrast to Clondalkin growth of 42.4%. Some areas have experienced large growth (Firhouse Village 97.6%) while others have declined (Terenure-St. James -33.1%).

Population & change, 2002-06

	South Dublin County	Dublin	Ireland
Population (persons)	246,935	1,187,176	4,239,848
% change 2002 – 2006	3.4	5.7	8.2
% change 1991 – 2006	18.3	15.8	20.3
Average no. persons per private household	3.0	2.7	2.8

2006 census

South Dublin County has the fourth lowest age dependency rate in Ireland declining faster than the national average since 1991. There are significant disparities between individual areas - three have rates exceeding 40% while other areas have rates half of these.

¹⁴ ESRI data

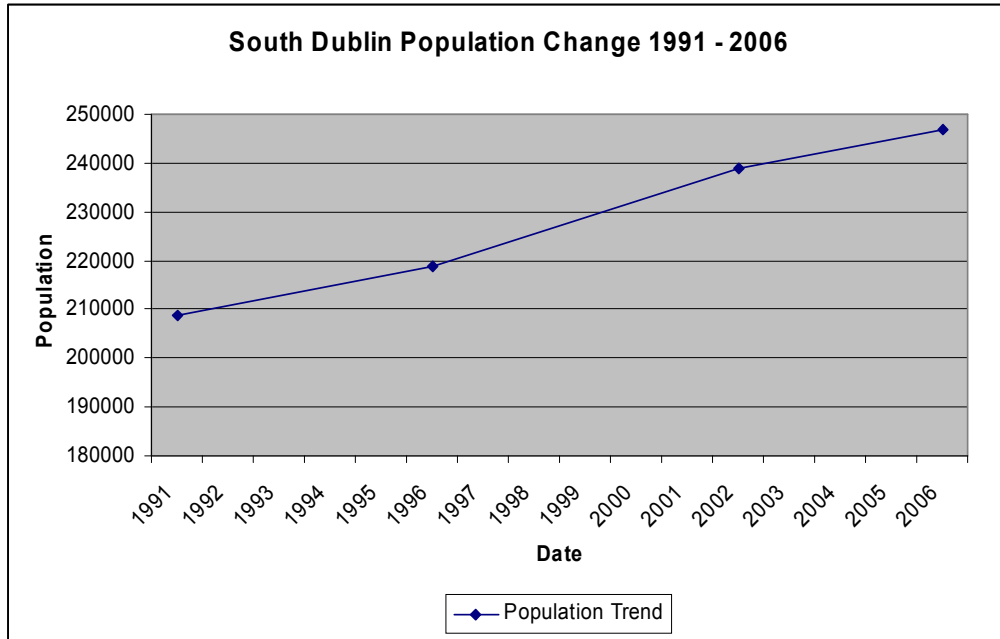
¹⁵ GVA is a measure of the wealth created by an economy and is equivalent to the value of outputs minus the cost of inputs – i.e. the value that has been added to the inputs purchased

¹⁶ CSO data for 2005

South Dublin County has the sixth highest proportion of single parents of any County in Ireland. Again disparities exist within the County, with rates exceeding 50% in four areas.

Presently 22% of the population is aged 0-14, 49% is aged 14-45 and 29% is aged 45+. The County population is young compared to Dublin city region and Ireland.

South Dublin population change 1991 to 2006



Population by age, 2006

	South Dublin County	South Dublin County	Dublin	Ireland
Total	246,935	246,935	1,187,176	4,239,848
0 – 14 y/olds	53,580	21.7%	18.3%	20.4%
15 – 34 y/olds	86,843	35.2%	36.3%	32.0%
35 – 64 y/olds	88,651	35.9%	35.0%	36.6%
65+ y/olds	17,861	7.2%	10.3%	11.0%

2006 census

Education

Currently 15.6% of the South Dublin County working population have a degree or higher which is in line with the national average but short of the 21.3% Dublin city region level. Furthermore, 13.1% of the population is educated to primary level (falling from 23% in 1996) which is lower than the national number and equal to the Dublin city region level. The number of workers educated only to primary level has fallen by 1% since 1992 as a share of the total workforce and that of those educated to degree level or higher has decreased by 4%.

Highest level of Education completed of over 15 y/olds, 2006

	South Dublin County	South Dublin County	Dublin	Ireland
Total	193,355	193,355	969,524	3,375,399
Total F/T education ceased	161,366	83.5%	82.4%	84.4%
Primary	25,320	13.1%	13.0%	15.2%
Lower Secondary	32,071	16.6%	13.5%	17.0%
Upper Secondary	48,957	25.3%	21.8%	23.8%
Non-degree	17,254	8.9%	8.3%	8.9%
Degree or Higher	30,159	15.6%	21.3%	15.6%
Not stated	7,605	3.9%	4.5%	3.9%
Total F/T education not ceased	31,989	16.5%	17.6%	15.5%
Total at place of learning	19,966	10.3%	11.1%	10.4%
Other	12,023	6.2%	6.5%	5.2%

2006 census

Nearly a quarter of degrees (24.5%) of County residents are obtained in social science, business & law which is slightly less than in Dublin but more than across Ireland; 12.8% are qualified in engineering, manufacturing and construction which is marginally above the national average.

Qualified 15+ y/olds with a third level qualification attained after completing 2 or more years of study classified by main subject area, 2006

	South Dublin County	South Dublin County	Dublin	Ireland
Total	47,193	47,193	290,997	820,760
Education	3,125	6.6%	5.7%	7.5%
Humanities & Arts	4,314	9.1%	12.3%	10%
Soc science, business, law	11,574	24.5%	26.5%	21%
Life science, physical science, maths & stats	2,388	5.1%	5.2%	5.1%
Computing	3,746	7.9%	7.4%	6.7%
Engineering, manuf & construction	6,054	12.8%	10.8%	12.3%
Agriculture & veterinary	498	1.0%	1.0%	2.6%
Health	4,839	10.2%	10.1%	12.1%
Social services	1,564	3.3%	2.5%	3.2%
Services	2,796	5.9%	4.8%	6.1%
Not stated	609	1.3%	1.0%	1.2%
Multiple subjects	5,686	12.0%	12.5%	12.2%

2006 census

Employment and Unemployment

South Dublin County has a significantly higher participation rate (68%) than Dublin city region (65%) or Ireland as a whole (62.5%). It has a higher percentage of its working age population at work - 63% - than Dublin (59%) and Ireland (57%). However, it also has a slightly higher proportion of its working age population unemployed - 5.2% compared to 4.8% in Dublin and 4.4% nationally. These translate into unemployment rates¹⁷ in South Dublin County in 2006 higher than Ireland averages for men (7.9% compared to 7.5%) and women (7.5% compared to 6.7%) and overall (7.7% compared to 7.2%).

Unemployment rates have fallen dramatically in South Dublin, Dublin city region and Ireland since 1991. South Dublin has tended to have marginally higher unemployment than Dublin city region and Ireland.

However, unemployment has risen significantly during 2008. There were approximately 11,237 claimants in Tallaght & Clondalkin offices in October 2008, representing an increase of 60% on the 7,039 claimants in October 2007¹⁸.

¹⁷ the unemployed as a proportion of those aged 15 and over at work or unemployed, Census of Population, 2006

¹⁸ CSO Live Register Analysis October 2008

Economic status, 2006

	South Dublin County	South Dublin County	Dublin	Ireland
Total	193,355	193,355	969,524	3,375,399
1: At work	119,280	62.7%	59.1%	57.2%
2: Looking for first regular job	1,771	0.9%	1.0%	0.9%
3: Unemployed	9,988	5.2%	4.8%	4.4%
4: Student	19,966	10.3%	11.1%	10.4%
5: Looking after home/ family	19,287	10.0%	9.5%	11.5%
6: Retired	15,208	7.9%	10.7%	11.2%
7: Unable to work	7,273	3.8%	3.5%	4.1%
8: Other	582	0.3%	0.4%	0.4%
9: Total in labour force	131,039	67.8%	64.9%	62.5%
10: Total not in labour force	62,316	32.2%	35.0%	37.5%
Participation rate	67.8	67.8%	64.9%	62.5%

2006 Census

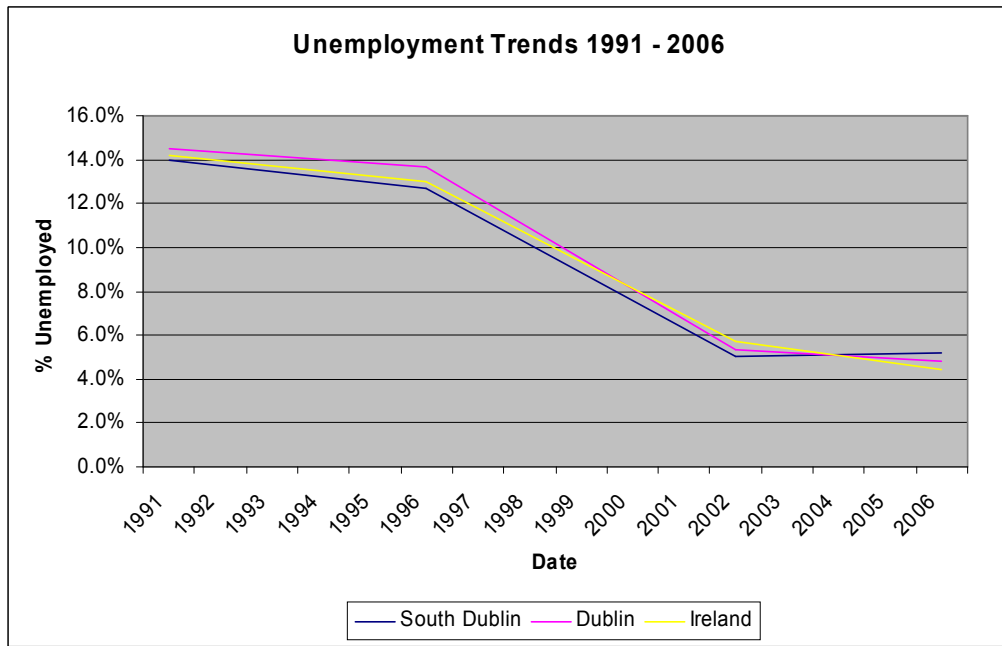
South Dublin County has 43% of its population employed as higher & lower professionals, skilled workers, managers and employers, compared to 44% in the Dublin city region and 42% in Ireland. The proportion of unskilled workers is 3%, compared to 3.3% in Dublin city region and 3.8% in Ireland.

Occupational Distribution of Employment, 2006

	South Dublin County	South Dublin County	Dublin	Ireland
Total	246,935	246,935	1,187,176	4,239,848
Employers & managers	42,137	17.1%	17.2%	15.3%
Higher professional	14,275	5.8%	7.9%	5.8%
Lower professional	24,395	9.9%	11%	10.7%
Non-manual	56,752	23%	21.4%	19.3%
Manual skilled	25,323	10.2%	8.2%	10.1%
Semi-skilled	19,319	7.8%	6.9%	8.4%
Unskilled	7,413	3%	3.3%	3.8%
Own account workers	10,687	4.3%	3.6%	4.3%
Farmers	318	0.1%	0.2%	3.9%
Agricultural workers	133	0.05%	0.1%	0.6%
Other employed	46,183	18.7%	20.1%	17.8%

2006 census

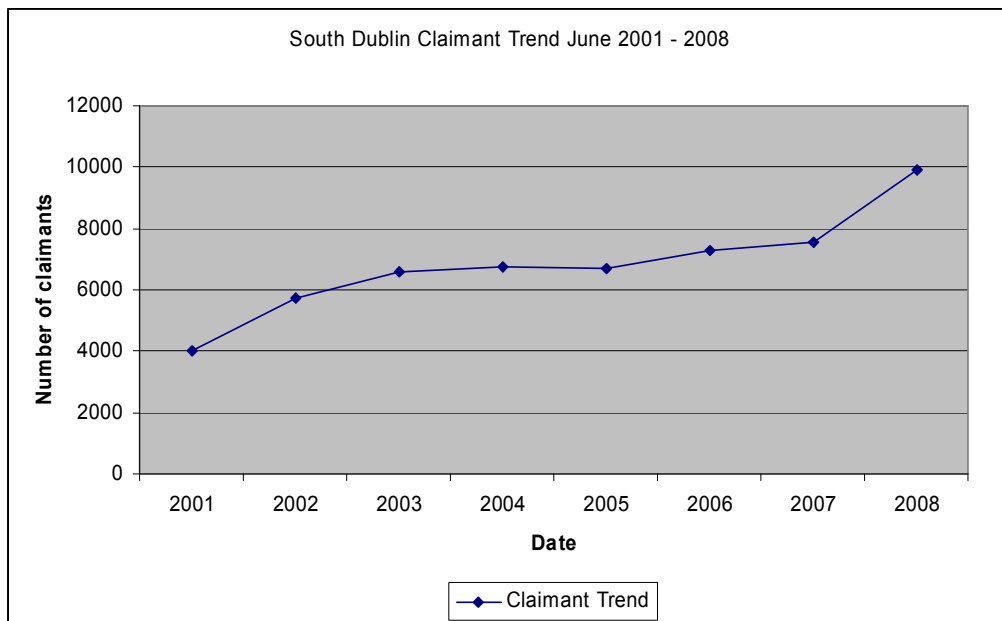
Unemployment from 1991 to 2006 in South Dublin, Dublin and Ireland



2006 census

Claimant numbers in South Dublin County have been trending upwards, and the latest figures for October 2008 indicate that they have climbed to above 11,300.

South Dublin claimant figures, June 2001 to June 2008



CSO – Tallaght & Clondalkin offices

Employment in the County is focused mainly in the services sector including locally and internationally traded services in particular in areas of wholesale & retail and real estate, rented & business activities.

Employment by broad industry group, 2006

	South Dublin County	South Dublin County	Dublin	Ireland
Total	119,280	119,280	572,896	1,930,042
Agriculture, forestry & fishing	483	0.4%	0.5%	4.6%
Mining & quarrying	131	0.1%	0.1%	0.4%
Manufacturing	12,640	10.6%	8.6%	12.6%
Electricity, gas, water supply	679	0.6%	0.6%	0.6%
Construction	11,191	9.4%	7.3%	11.1%
Wholesale & retail trade	19,712	16.5%	13.1%	13.3%
Hotels & restaurants	4,863	4.1%	4.9%	5.2%
Transport & communications	8,531	7.1%	7.2%	5.5%
Banking & financial services	7,396	6.2%	7.8%	4.4%
Retail estate, renting & business activities	12,833	10.8%	14.3%	9.4%
Public administration & defence	7,407	6.2%	5.9%	5.2%
Education	6,871	5.8%	6.4%	6.6%
Health & social work	10,721	9%	9.6%	9.9%
Other community activities	5,233	4.4%	4.8%	4.2%
Industry not stated	10,589	8.9%	8.9%	6.9%

2006 census

Deprivation/ Occupational Class

South Dublin County is the tenth most affluent County in Ireland, but in Dublin city region, the second most relatively deprived County. Deprivation is concentrated in a few areas - 3 areas in South Dublin County are 'very disadvantaged' (Tallaght-Killinarden, Clondalkin-Rowlagh and Tallaght-Fettercairn). Six more areas are 'disadvantaged' primarily in the Clondalkin and Tallaght areas.

The social class composition has changed throughout Ireland to roughly match the changes in educational achievement with a gradual increase in the number of professionals while the number of low-skilled and unskilled manual workers has declined. 32% of the County's population is in the two highest social 'classes' by employment, albeit this proportion is below that of Dublin (3.7% lower) and Ireland (0.9% lower). 13.4% are in the lowest social 'classes', compared to 12.9% in the Dublin city region and 15.3% across Ireland.

Occupational 'Class', 2006

	South Dublin County	South Dublin County	Dublin	Ireland
Total	246,935	246,935	1,187,176	4,239,848
1 Professional workers	15,211	6.2%	8.4	6.5%
2 Managerial and technical	63,806	25.8%	27.3%	26.4%
3 Non-manual	47,677	19.3%	17.6%	17.0%
4 Skilled manual	42,099	17.0%	14.0%	17.1%
5 Semi-skilled	25,374	10.3%	9.3%	11.1%
6 Unskilled	7,561	3.1%	3.4%	4.2%
7 All others gainfully occupied and unknown	45,207	18.0%	19.8%	17.6%

2006 census

In South Dublin there is a higher proportion who have at least one car (84.4%) than in Dublin city region (73.4%) or Ireland (80.2%).

Motor car availability, 2006

	South Dublin County	South Dublin County (%)	Dublin	Ireland
Total	80,358	80,358	419,529	1,462,296
One car ownership	32,924	41%	39.8%	38.6%
Two car ownership	27,942	34.8%	27.4%	32.9%
Three car ownership	5,471	6.8%	4.9%	6.4%
Four+ car ownership	1,501	1.9%	1.3%	2.4%
Total having at least one car	67,838	84.4%	73.4%	80.2%
Total having none	12,520	15.6%	26.5%	19.7%

2006 census