

# Ensuring inclusive, sustainable recovery in the Greater Dublin Region

A proposal by South Dublin Chamber and Dún Laoghaire – Rathdown Chamber to the National Economic Plan to yield economic return and recovery



## From Crossroads to Communities

Regionalising Recovery for a greener Greater Dublin

- A Vision for Urban Sustainable Recovery
- Profiling Greater Dublin
- Profile: South County Dublin
- Profile: Dún Laoghaire-Rathdown
- Combatting the the impact of Covid-19 on the Greater Dublin Economy



**South Dublin  
Chamber**  
Advancing business together



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Rathdown  
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# Foreword

Having delivered Budget 2021 and a series of measures to assist recovery in the immediate terms, the Government has now invited stakeholders to contribute to the forthcoming National Economic Plan.

On behalf of businesses employing over 50,000 people and serving the needs of a half a million citizens – one-tenth of the Republic's population – we are delighted to answer the call. In this report "Ensuring inclusive, sustainable recovery in the Greater Dublin Region", South Dublin Chamber of Commerce and Dún Laoghaire – Rathdown County Chamber of Commerce are joining forces to make a constructive proposal to deliver economic returns and recovery for the Greater Dublin region and the nation as a whole".

Ireland is eager to get back to work and back to business after a costly lockdown. The Covid-19 crisis has forced us to think about our future like never before. Do we want to work and do business in high priced, high density and traffic congested urban centres with all the stresses and strains that go with that or do we want a different future, one where the workplaces we return to are more accessible, carbon-neutral and with a work-life balance? Having implemented a July Stimulus package and announced Budget 2021, the government is now preparing a National Economic Plan. A plan that, building on the Stimulus and Budget 2021, can set a course for future resilient to current and future pandemics.

As it does so, we in South Dublin and Dún Laoghaire Rathdown County Chambers of Commerce are working together to put a vision before the people and businesses in one of Ireland's most crucial regions: Greater Dublin region. In this vision, we call on government – at local and national levels - to grasp this unprecedented opportunity to create safe, sustainable futures for our citizens. In the Programme for Government, there is a clear commitment to developing a balanced scorecard approach to improving our lives including not just economic indicators, but ones based on well-being. This now needs to be reflected in how Budget 2021 Implements Project 2040 for areas that, like other parts of Dublin, contribute generously to our economy and exchequer but also have their own unmet needs: South Dublin and Dún Laoghaire-Rathdown. This means a town centred focus on recovery, clean air, a better work-life balance and the provision of proper housing, community infrastructure, greenways, and public transport. We see the potential of our respective County Towns Dún Laoghaire and Tallaght and the other towns and villages playing a vital role in our growth and prosperity.

What does this mean for the Greater Dublin area? Firstly, proportionality it means that in allocating investment in sustainable recovery, Budget 2021 and the National Development Plan must recognise in its allocation of resources that South Dublin County and Dún Laoghaire Rathdown County areas represent a very significant share of Ireland's GDP.

Secondly, these areas are a vital crossroads from central Dublin to the West, South West, South East, Midlands, Mid-West, Mid-East, and North-West regions. They must be more than a crossroads and they must be empowered to reach their community and economic potential. They are, above all, communities making up one-tenth of our population.

They have seen massive investment in roads and rail. Greater investment will unlock these counties potential in human investment - local town and village infrastructure, localised transport systems and community-connecting infrastructure – all of which will provide community and economic benefits to the whole of Ireland. It cannot be right that it takes less time to drive from Dublin to Athlone than it does to take public transport from Lucan to Loughlinstown. By greater investment in public transport in Greater Dublin, we can create a virtuous circle by attracting employment to where people live, shortening commutes, raising the quality of life, and beating the virus.

We are neither the city nor rural Ireland, the Greater Dublin area must become a network of thriving communities that are connected not by motorways going through them, but by affordable housing, high-quality amenities, accessible public transport and a common future. By creating more affordable desirable communities in spacious areas near green amenities, this vision will benefit all by preventing a return to the congestion and price pressures of the pre-Covid era. It is in spirit with the Programme for Government's commitment to renew town centres and Project 2040 to create strengthen communities, developing sustainable mobility and spread recovery more evenly around the country.

We hope it inspires similar thinking across the country We look forward to government investing in a common recovery that benefits all parts of the country equally, in a sustainable, community-based manner.

## **Brian Kirwan**

President,  
Dún Laoghaire Rathdown  
County Chamber of Commerce

## **Eamonn P. Egan**

President,  
South Dublin Chamber

# 7 Key Take-Aways



## 1. (Greater) Dublin Deserves Better

With one-third of the State's population and less than 4 per cent of its land area, the Greater Dublin region generates nearly half of economic output and three-fifths of its tax revenue. South Dublin County and Dún Laoghaire-Rathdown together account for over half a million people, or 10 per cent of the State's population. Greater Dublin is not just a cash cow or a crossroads for Ireland: Its citizens deserve affordable housing, good quality of life and accessible amenities. And investment in jobs to offset tens of thousands of jobs already lost



## 2. Towards an inclusive, sustainable Recovery

Despite leading the last recovery, the greater Dublin region has witnessed higher house prices, congestion, long commutes, and a deteriorating quality of life. This time recovery must be different, leading to a restoration of quality of life in sustainable communities. In addition, recovery must be more diffuse than the previous recovery and more evenly spread across different sectors, income groups and age groups.



## 3. A Fair Share for Greater Dublin

At a conservative estimate – based on population share – the Greater

Dublin region should receive in Budget 2021 the following share of Programme for Government targets:

- At least €3.3 billion in investment forecast in the April "Stability Programme"
- At least 70,000 of 200,000 new jobs targeted in the Programme for Government
- At least 17,000 of 50,000 new houses targeted in the Programme for Government



## 4. South Dublin County

Home to nearly 6 per cent of the State's population, South Dublin County houses nationally vital transport arteries, business parks, industrial estates and logistics and commercial services. Due to the employment base, the county faces higher Covid related job losses. South Dublin County must in Budget receive at least:

- Approximately €590 million in investment in Budget 2021,
- At least 3,000 new houses and 12,000 new jobs targeted in the Programme for Government
- Increased investment in more public transport, village amenities and tourism facilities
- The targeted creation of jobs in Office facilities, Pharma, Big Data and Green energy

We must invest in providing more third-level education and high-quality job opportunities for residents of this area in order to reduce the risk of recreating enduring pockets of youth and long-term unemployment. Given its relatively lower land costs and population density, South County Dublin should be targeted for the strategic residential, business and village and retail development along the Strategic Development Zones identified and other areas such as the N7 corridor.





## 5. Dún Laoghaire-Rathdown

Home to nearly 5 per cent of the State's population, Dún Laoghaire-Rathdown's citizens face unaffordable accommodation. Its housing, retail and tourism potential are also underdeveloped relative to its stunning potential and low population density. This area must receive:

- Approximately €465 million in investment in Budget 2021,
- At least 2,500 new houses and 9,000 new jobs targeted in the Programme for Government
- Investment in tourism and connecting (coastal to mountain) infrastructure/transport
- Investment to create clusters in growth sectors (Finance, ICT, etc).

The risk of condemning to long-term unemployment many small businesses in the area – businesses who helped drive national recovery – must be averted as a matter of natural justice. Pockets of underprivilege must be targeted by providing education to equalise life chances. The area's potential to create high-quality jobs in tourism, retail, Finance and ICT should be fully exploited and supported by investment in public transport



## 6. A voice for Greater Dublin

An integrated voice is needed for Greater Dublin to ensure that its predicted rise in population – a quarter-million by 2040 – is well planned and resourced.



## 7. A stronger voice for Small Business & Entrepreneurs

The small business sector has finally been listened to but only because it is so vital for recovery. We should not have had to wait so long. Past neglect and underrepresentation must be replaced by a greater and permanent representation and consultation at a national and local level. With less and less business people going forward for election they now form a small minority in elected forums. In some local authorities elected councillors from business backgrounds are a very small minority or non-existent.

# Introduction

## From Lockdown to Local Recovery

### The Vision

Communities, like the people that live in them, need a heart as well as a backbone. South Dublin and Dún Laoghaire Rathdown are not short of the latter: They are vital channels for commercial and commuter traffic from central Dublin to the middle, mid-east, west and south of Ireland via some of Ireland's most important infrastructure – the M50, Dún Laoghaire Harbour, N7/M7, N4/M4 and M11 to name a few. The question is are they crossroads, or communities? Gateway/dormer towns, or homes?

The Greater Dublin region is not just an economic engine and crossroads for the rest of Ireland: It is home to 1.6 million (including Kildare) – people – a third of the state's population – who are as much entitled to investment in their communities and futures as any other part of Ireland. These areas generate a disproportionately high share of economic output and taxation – one half and two-thirds, respectively. This is despite having one third of the state's population. So, investment in these regions amounts to investing in a region that is a net contributor to the economy and exchequer.

Even within the Greater Dublin Region, the local authority areas of South Dublin and Dún Laoghaire combined have over half a million people<sup>1</sup>. This is comparable to Dublin city centre and both exceed the urban populations of Cork, Galway and Limerick and almost matches their combined populations.

This report has a simple message: The forthcoming budget must now provide for putting into the Greater Dublin region the same investment in people friendly amenities, community and village infrastructure, housing and job opportunities as it needs to grow to reach its community and economic potential. A potential that enriches not just its own county population but increases its net contribution to national budgets.

It must allocate them a fair share of resources to enable these areas to overcome the profound impacts of the Covid-19 recession. Like other areas of the country, South Dublin and Dún Laoghaire Rathdown have been impacted by Covid-19. Relative to other areas, they have positive and negative aspects that justify particular attention: Both have the capacity to help lead recovery in areas of employment – Financial Services, Pharmaceuticals and professional services – which are growing despite Covid-19. But they also, if left unattended, present the risk of rendering unemployed many small business owners whose risk taking and hard work created the last recovery, a recovery from which many of them have been weakened. In addition, and in certain parts of

the Greater Dublin region, we could see the emergence of a blight we thought we had seen the back of: A resumption of geographically concentrated youth unemployment that risks creating intergenerational poverty traps.

Through localised investment in social and human oriented infrastructure and transport (as envisaged in the Programme for Government) we can help these regions to help Ireland. Key priorities should be:

- Increase public health by moving centralised and dense to safe, well-spaced environments
- Investing in natural amenities/green spaces. Making the most of sustainable planning potential
- Creating local transport services to shift road transport from car to light rail and bus alternatives.
- Reduce carbon impact of long commutes from South Dublin / DLR to central Dublin
- 1 Applying 2016 Census data (CSO) for County level population to subsequent regional population growth trends.
- Draw inward investment/jobs by developing international connectivity and local transport.
- Create green transport arteries – cycling lanes, walkways, and amenities to enrich community life
- Bring jobs and people closer together. Shift from a high to low levels of stress cost and commutes
- Bringing higher education and training and students closer together. Current provision strongly centres on central Dublin leaves a majority of Dublin's students facing long and expensive commutes or high rents to access education: Good social capital development localises learning and working opportunities.

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1) Applying 2016 Census data (CSO) for County level population to subsequent regional population growth trends.



## Project 2040

These objectives are in line with the vision of Project 2040, namely creating climate resilient societies, sustainable housing – social and private – in well-designed green urban spaces that are internally connected in ways that strengthen communities. Also strengthening economies, innovation and skills with international connectivity and access to quality education, childcare and Health Services.

To make all this a reality we need to renew Project 2040 for the Greater Dublin region. Facing already the daunting challenge of an expected quarter of a million rise in population by 2040, this engine of national recovery requires planning and investment to meet the following challenges:

- Allocating housing provision, schools, public transport and amenities to meet this growing population
- Devising economic strategies to create localised employment, education and skills provision
- Ensuring County Development Plans are sustainable and robust to the challenges of Covid-19 and Brexit.

## County Development Plans

We are now two thirds of the way into the 2016-2022 County Development Plans and consultations on the next phase of plans is beginning. As the government implements Budget 2021 and the National Economic Plan, the rising risk of a No-Deal Brexit<sup>2</sup> adds urgency to the challenge of re-evaluating priorities from the full employment situation prevailing during the initial phase of these plans to the current situation: Zoning, infrastructure provision and the sustainable provision of housing, transportation and amenities need to be re-aligned.

In addition, and on a tactical basis, we must

- Fast track consultation on County Development Plan amendments to align as closely as possible with the need to contribute to recovery, targeting final adoption by end Q1 2021.
- Acknowledging partnership dialogue to ensure that the sector bearing the brunt of the crisis – the SME sector – is given a proportionately adequate voice.

## Programme for Government and Budget 2021

- The Stimulus Package of July was broadly welcomed and was – quite correctly – nationally rather than regionally targeted. With Budget 2021 committing €10 billion to investment, the priority is to pursue the planned localised investment strategies that will complement the Stimulus Package and turn national stimulus into local recovery. Programme for Government's (PFG) focus on Town centres in its recovery strategy is most welcome.
- Ensuring adequate accessible seed funding for developing serviced sites for town centre development
- Aligning county development plans with the envisaged Long-Term National Economic Plan
- Ensuring SME-MNC & sectoral groups envisaged in the PFG target/collaborate with local stakeholders
- Ensure that sustainability and climate compliance requirements for investment are sensitively constructed to enable ease of compliance for SMEs.

# Introducing “Greater Dublin”



## GREATER DUBLIN\* MAKES UP ....

*Figure 1 Greater Dublin's share of population, economic value added and tax revenue\**



**33%** of the State's Population      **1.6 million**



**Less than 4%**  
of State's land

**€141 bn** GVA\*



**46.6%** of State's Economy



**59.7%** of Tax Revenue

**€27.9 bn\***

\* See Annex "Sources and Methodology"



# Introduction

Accounting for one-third of the State's population, almost half of Gross Value Added and three out of every five euro received in tax revenue, investment in this region is not only warranted by population levels but is – de facto – investment without having to borrow: The region is clearly a net contributor to the State. The ensuing analysis will also show how, by relieving Dublin high house prices and Kildare's long commutes, the investment will pay social as well as economic dividends.

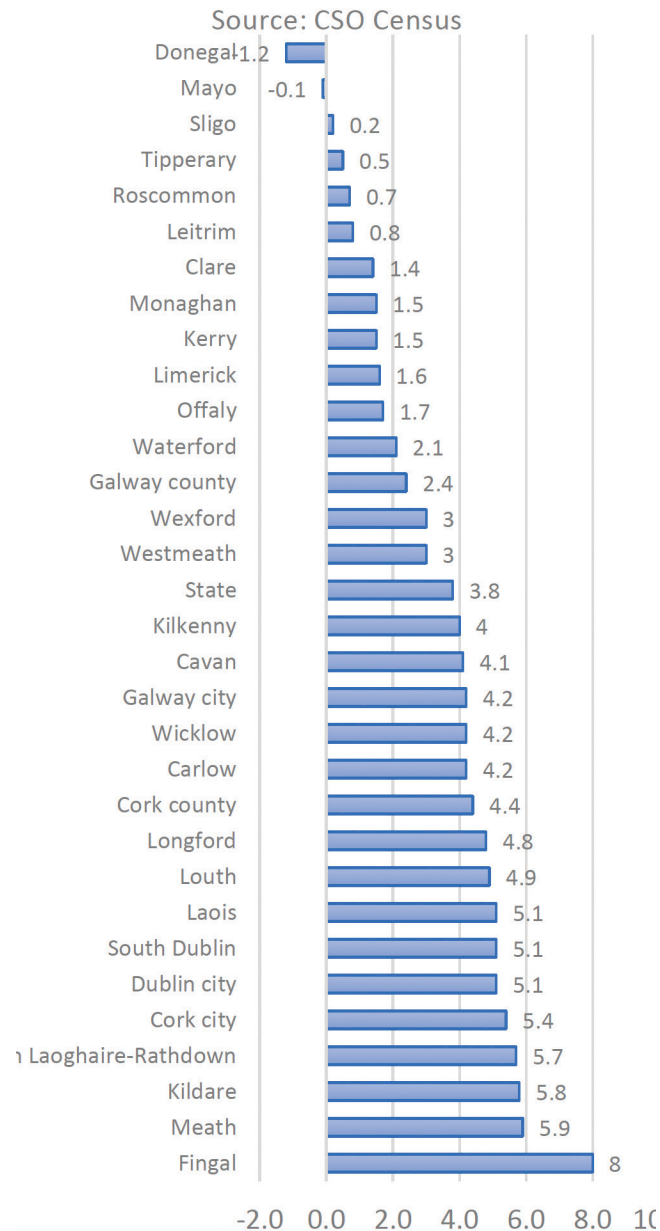
Project Ireland 2040 assumes that county Dublin will see population growth of between 235,000 and 290,000 by 2040.... adding the equivalent of the current population of South Dublin.

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South Dublin.



**Figure 2 Population growth\***

Fingal, Kildare, Dún Laoghaire Rathdown, South Dublin and Dublin City were 5 of the 7 fastest growing local authority areas between 2011 and 2016



\* See Annex "Sources and Methodology"

The reasons for this go beyond economic fair play:

As shown in Figure 2, the local authority areas of Fingal, Kildare, Dún Laoghaire-Rathdown, Dublin city and South Dublin (see dark bars on graph) experienced the most rapid rates of growth between 2011 and 2016.

And it must be remembered that this period - the last for which census data is available - was a period dominated by recession.

Despite this, population grew in just five years by 5.1 per cent in South Dublin and Dublin city, by 5.7 and 5.8 per cent in Dún Laoghaire-Rathdown and Kildare respectively and by 8 per cent in Fingal (over twice the national average rate of population growth for the period).

The combined area's growth over the 2016 to 2019 - a shorter period of 3 years - is expected to have been close to 4 per cent, implying a broad momentum of population growth.

Project Ireland 2040 assumes that county Dublin will see population growth of between 235,000 and 290,000 by 2040.

In other words, Dublin city and suburban populations will rise by approximately one fifth adding the equivalent of the current population of South Dublin.

On the conservative assumption that the Greater Dublin Area - as defined here - grows at broadly the same rate, there will be very close 2 million people in this region by 2040.



## The Dublin Region dominates employment

As shown in Figure 3 below, one third of Ireland's workforce commutes and works to work in the Greater Dublin region. Together, Dublin and Kildare account for just 3.7 per cent of the State's land mass. This implies, obviously, a far higher clustering and density of population than the rest of the country. As well as post Covid-19 risks of population clustering and obvious property price pressures, this should bring countervailing advantages of shortening commute times between workers and their place of work.



**Figure 3 Greater Dublin Employment levels\***

	Total*	Share of National Employment
Dublin	683,100	30.7%
Greater Dublin Region	790,500	35.5 %

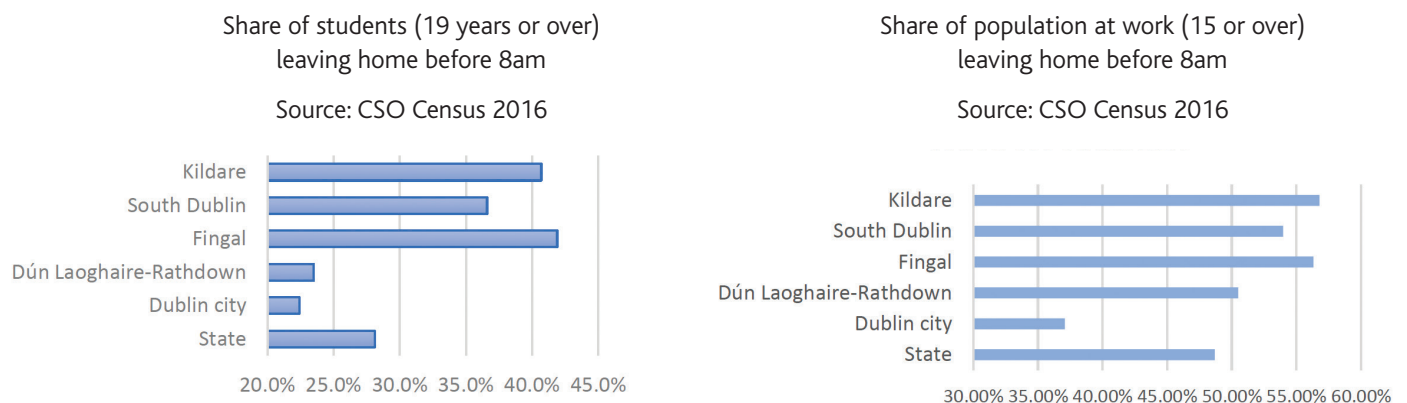
## Dublin's house price / commuting time trade-off is killing quality of life

In cities well designed and planned – Copenhagen for instance – this is the case. However, a perplexing paradox that has faced Ireland since the onset of the Celtic Tiger is that due to lack of coordinated planning commuting pressure is far greater despite greater proximity to work. As noted in sections further down, this is substantially more so in Kildare, South Dublin and Fingal – more outlying areas – than is the case in Dún Laoghaire-Rathdown and Dublin City, the latter being well served by rail (DART and Luas) and a good density of bus networks.

While these services do extend into more outlying areas of Dublin, they taper off as their radial spokes move out from the centre becoming more distant from one another and leaving too many students and workers too far from public transport and community amenities that those in urban centres around Ireland take for granted. The citizens of Dublin city and Dún Laoghaire-Rathdown endure a different challenge: the most expensive accommodation costs in Ireland. Growing up in such areas is, despite their amenities, there is little comfort knowing the unlikelihood of ever being able to afford to settle down near family and friends. Given its contribution to the nation, Greater Dublin deserves better. Its citizens are not just there to provide economic resources and transport routes for the rest of Ireland. They deserve a good, affordable quality of life and local jobs that do not demand draining commutes to and from work.

We next examine how imaginative investment can make this a reality and help Greater Dublin and Ireland as a whole recover from recession. As Chambers Ireland put it its Budget 2021 submission Putting Place First "we need to see better joined up thinking, linking in planning, local government, transport and housing policy. Urban centres must be good places to live, if they are going to be decent places to do business".

**Figure 4 Commuting pressure for students and workers\***



## The Dublin Region can drive a balanced recovery

Covid-19 has devastated the nation's economy. Unemployment and business closure as a result of the crisis are the most immediate challenges we face as a result. Longer-term re-directing business strategy and re-ordering our working lives towards safer, more sustainable models of doing business and working are the key priorities. Reducing the risk of Covid-19 spreading obviously over arches all of these. Thankfully, all these objectives are consistent with one another. Indeed, if properly implemented and directed properly, sustainable recovery investment will put more of our citizens in easier reach of commutable work with affordable housing in well-developed communities and, in doing so, create more infection proof and sustainable living.

\* See Annex "Sources and Methodology"

For both challenges, Greater Dublin will play a pivotal role. As regards the immediate – and daunting – challenge of tackling unemployment the Dublin economic region will be the key motor of jobs recovery as it was during the last crisis. The question is whether, as in the last crisis, the recovery in the labour market will be unevenly spread or whether proper investment will ensure a more balanced and evenly spread recovery.

Figure 5 shows how, by mid-year, the official unemployment rate more than quadrupled. Adjusted for Covid-19, the numbers unemployed exceeded half a million at end June and the “Covid-19” unemployment rate stood at 23.1 per cent, albeit on a declining trend as the lockdown wound down.

*Figure 5 “Covid-19” adjusted unemployment\**



**23.1%** of the work force      **531,412**

The Dublin region led recovery during the last crisis as shown in Figure 7 with 90.4 per cent of jobs lost between the start of the last recession and its peak being restored by the first quarter of 2017. A key policy issue during the last crisis was that the State as a whole lagged behind, recreating only 82.5 per cent of jobs lost. Another key feature of the last recession was its very uneven impact across different local authority areas in Greater Dublin (see Figure 6). Given the higher population growth (see Figure 2) this adds extra urgency to ensuring that high population growth areas that are also vulnerable to unemployment – South Dublin, Fingal and Kildare – receive the investment they need.

*Figure 6 Differences in Recovery by Local Authority area\*: Unemployment rates*

	2011	2016
State	19.0	12.9
Dublin City	18.5	12.9
Dún Laoghaire-Rathdown	11.2	7.4
South Dublin	19.6	13.3

*Figure 7 Differences in Recovery by Region\*: Employment loss & replacement*

	2008 Q1	2012 Q1	2017 Q1	Replacement
Dublin	649,400	543,500	648,800	99.4%
State	2,219,500	1,863,000	2,158,400	82.5%

All instruments of policy – National Economic Plan, Project 2040, and County Developments plans – now need to be aligned to these objectives in a manner consistent with the commitment to a sustainable, community based recovery as outlined in the Programme for Government.

\* See Annex “Sources and Methodology”

## Investment needs in Budget 2021, the National Economic Plan and future County Development Plans for 2022-2028

The Programme for Government unveiled in June will be followed by the publication of a National Economic Plan. Where the July Stimulus package introduced nation-wide measures to boost demand in the short to medium term, Budget 2021 has targeted more medium to long-term recovery. It will, at national level

- Set the direction of capital expenditure for economic recovery
- Enable a more regional approach in line with Project 2040
- Enable more time – between now and October (compared to the urgency of the stimulus package) to take an evidence-based approach to policy formation and a more detailed approach to implementation.

As Budget 2021 works at national level, it must resource Project 2040 and County Development Plans to operate at regional and local levels, respectively. Here we begin by looking at case for major regional investment in Greater Dublin before zooming in on the need to resource local recovery in South Dublin and Dún Laoghaire-Rathdown

### The needed magnitude of spending in Greater Dublin and its constituent areas

Budget 2021 forecasts imply a capital spend next year of €10.1 billion.

### Given the foregoing analysis several points should be clear:

- Generating as it does 3 out of every 5 euro in tax revenue, the Greater Dublin region could receive more than half of all capital spending before contributing to any capital spending deficit by government.
- Greater Dublin's higher population growth, house prices and (despite higher density population) challenging commuting environment points to a significantly high need for investment.
- Accounting for a third of the State's population, one half of its economic value added and three fifths of taxes – Greater Dublin should receive between a third and a half of capital spending in Budget 2021

Figure 8 Latest projections for Public Investment in 2021\*



**2.8% of GDP**      **€10.1 bn**

### The needed focus of spending in Greater Dublin and its constituent areas

Specific needs for investment are discussed on a local authority by local authority basis further below. In broad overview, however, the clear priorities for capital spending in Greater Dublin must be:

- At least a third of voted infrastructure spending for 2021 (3.3 billion based on a current forecast of €10.1 billion).
- A fair share of the 200,000 jobs (at least 70,000) to be created under the National Economic Plan
- A fair share of the 50,000 new housing units (at least 17,000) committed to the Programme for Government
- A revitalisation and linking of town centres in South Dublin, Dún Laoghaire-Rathdown, Kildare and Fingal
- A clear commitment to developing the SDZs, N7 corridor and Tallaght Local Area Plan to its full residential, economic, and green potential
- A clear commitment to develop the potential of clusters in the Green energy, Pharma, Big Data and Office sectors in South Dublin and Dún-Laoghaire.
- A clear commitment to develop Dún-Laoghaire-Rathdown and South Dublin's huge potential for tourism and retail as well as its potential to accelerate high tech jobs growth in professional services to compensate job loss elsewhere.

\* See Annex "Sources and Methodology"



# Profile: South Dublin County



## Introduction

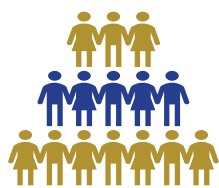
The population of South Dublin County was recorded at 278,767 in the 2016 Census, exceeding Cork city (125,657), Galway city (78,668) and Limerick city and county (194,899) and the combined city populations of Cork and Galway.

Its population – using April 2019 Population estimates (see Annex on Methodology and Sources) – is now estimated to exceed 290,000. On the assumption of a continuation of the growth in population seen between 2011 and 2016 South Dublin County's population is likely to break the 300,000 barrier within the 2016 to 2022 current County Development Plan cycle.

Given that almost 18 months have elapsed since the April 2019 benchmark for estimation, this benchmark may, however, already have been reached and it is not impossible that by 2025 the population of South Dublin County will reach one third of a million.

And here is the good news: As shown below in Figure 9, South Dublin County has the capacity to absorb population growth. With a population density at just a quarter of the level of Dublin City Councils area, it offers a safe, spaced, and sustainable environment for urban, economic and community development. In a future when many will need an office space at home to work from home, having such an area adjacent to central Dublin is significant strategic asset.

*Figure 9 Population & Population Density of South Dublin County (2019)\**



**288,259**  
(estimate)\*

**5.9% of State Pop.**  
(estimate)\*

**South Dublin County : 1,294** approx per square Km

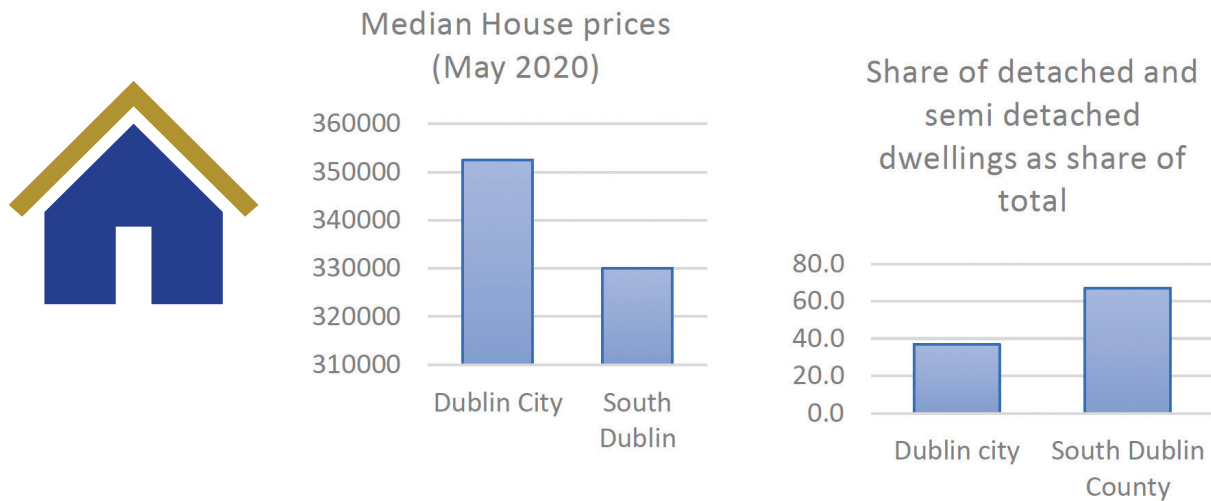
**Dublin City: 4,986** approx per square Km

An additional argument for greater investment in South Dublin County is the relatively lower level of house prices compared to Dublin city centre (see Figure 10).

There is also a far greater availability of detached and semi-detached houses. This combination of relative affordability and lower density - hence safer in a pandemic environment - while remaining proximate to Dublin city centre makes South Dublin County a logical choice to prioritise capital investment in the National Economic Plan. There should be two dimensions to this: Firstly, fully developing South Dublin Counties recovery potential.

\* See Annex "Sources and Methodology"

Figure 10 Housing: Prices and availability of detached and semidetached dwellings\*



## A strategic growth corridor: Maximising South Dublin Counties recovery potential

South Dublin County was hit badly by the last recession developing pockets of unemployment that could, had they become embedded, have recreated severe social problems we last saw in the 1980s. That risk is now with us again as sectors like retail, transport, logistics and business services industries – crucial jobs providers in the county – get hit hard. At the same time the area has vast potential in three aspects:

- Firstly, the area serves as a gateway from central Dublin to most of the rest of Ireland by rail and road
- Secondly, the SDZs in Clonburris and Adamstown the N7 development plan and the Tallaght Local Area Plan have great potential for residential commercial and community development. South Dublin has one of the largest industrial and commercial land zonings of any authority in Ireland. Some 1,351.4 hectares of land are allocated to Enterprise and Employment. 554 hectares are as yet undeveloped.
- Thirdly, its proximity to central Dublin and its connectivity to Dún Laoghaire, Kildare, Fingal, and Wicklow make it of pivotal importance and potential to Ireland's development. By taking pressure off the city centre it can provide a relatively lower cost environment for business, retail, office space and third level education.

Now the time has come to invest in that potential in the following ways:

- Revive, adapt (to the challenges of Brexit and Covid-19 recovery) N7 development plan and the Tallaght Local Area Plan to create a strategic artery between Kildare and central Dublin that is a community as well as a conduit
- Target at least 12,000 and up to 20,000 of 200,000 new jobs in the area under the National Economic Plan.
- Create an ambitious housing programme including the counties SDZs in Clonburris and Adamstown absorbing at least 3,000 and up to 10,000 of the 50,000 housing units committed to in the National Economic Plan.
- Further develop an emerging medical quarter in Tallaght with both a dynamic health benefit as well as economic and employment potential as part of the Tallaght Town Centre Local Area Plan

\* See Annex "Sources and Methodology"

## A Community Corridor – linking Lucan, Clondalkin and Tallaght

Inhabitants of central Dublin enjoy seamless connectivity between most of its different parts. The distance between Ballsbridge and Baldoyle and between Clontarf and Castleknock can be travelled either by DART, convenient bus route, cycling or – part of the way at least – even walking.

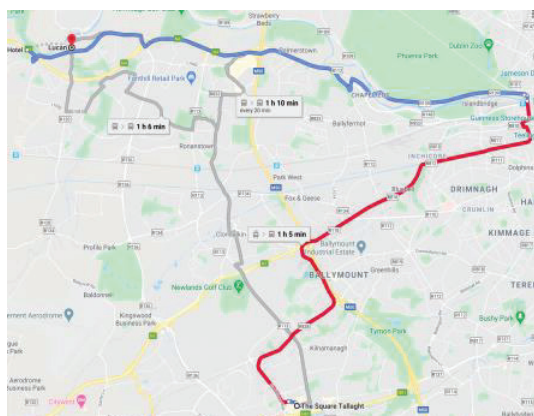
Inhabitants of South County Dublin enjoy no such advantage. Indeed, the extent to which this area bears the air pollution noise pollution, visual and other costs of bearing some of Ireland's most vital transport arteries is inversely proportionate to the lack of human connectivity and community infrastructure for those who live there. **This is what the Implementation of Budget 2021 must change.**

As shown in Figure 11 below (source: Google), transport in South County Dublin is such that travelling from Lucan to Tallaght town centre – the two “book end” town centres of the area – takes four times as long by public transport as by car. This results in the area having (through no fault of its residents) one of the worst carbon footprints in Dublin. Apart from the appalling carbon impact, this creates a dehumanising disconnect between Lucan, Clondalkin and Tallaght that must be corrected. Figure 11 is just one symptom of this disconnect.

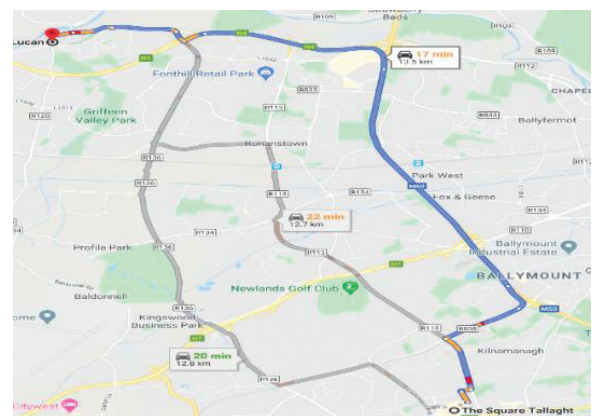
The failure to create a seamless walkable and cyclable green corridor between these three town centres contrasts with the speed facilitated to car traffic going through the area. An absolute priority must be given to creating a connecting arc of walkways, cycling lanes, and distributing public transport services.

This is also about urban equality: As Figure 4 above shows, residents of South Dublin County are significantly more likely to have to leave their residence for study (over 35 per cent) or work (over 50 per cent) before 8am compared to other areas of Dublin.

*Figure 11 Car versus Public Transport: Lucan to Tallaght town centre.*



(a) Public Transport: 1 hour 6 minutes minimum



(b) Car: 17 minutes.

### There is now and urgent need to invest in that potential in two ways:

- Prioritise the development of an “arc” of carbon friendly public transport services, walkways and greenways between Lucan Clondalkin and Tallaght and further on to Knocklyon and Rathfarnham (see inset)
- Further investment in public parks and village centres in the area to raise the quality of life and prevent the decline of community centres because of business closure.

As the following finding from a recently published academic paper shows, Ireland – and in particular, Greater Dublin's – commuting challenge is reaching a tipping point:

“If journey times for commuters continue to rise, this is likely to have negative monetary, health and environmental consequences. The cost of longer journeys will fall partly on individuals but also on government budgets, as many countries or cities subsidise particular transport modes. The existing challenges of developing appropriate decarbonised transport systems will be compounded. Long commutes can harm well-being and mental health, and commuters may be exposed to additional air pollution” (Lyons, 2020)



# Profile: Dún Laoghaire Rathdown



## Introduction

The population of Dún Laoghaire-Rathdown was recorded at 218,018 in the 2016 Census, exceeding Cork city (125,657), Galway city (78,668) and Limerick city and county (194,899) and the combined city populations of Cork and Galway.

Its population – using April 2019 Population estimates (see Annex on Methodology and Sources) – is estimated at just over 225,000. On the assumption of a continuation of the growth in population seen between 2011 and 2016 Dún Laoghaire-Rathdown's population is likely to break the quarter million barrier by 2030.

The joint populations of Dún Laoghaire-Rathdown and South County Dublin at the time of the last census was 496,785 but under reasonable assumptions is now significantly above half a million making it a significant urban agglomeration in its own right.

Like South County Dublin, as Figure 9, Dún Laoghaire Rathdown has the capacity to absorb population growth. With a population density at just over one third the level of Dublin city authority area, it offers a safe, spaced and sustainable environment for urban, economic and community development for a post Covid work environment.

*Figure 9 Population & Population Density of South Dublin County (2019)\**



**226,292**  
(estimate)\*

**4.6% of State Pop.**  
(estimate)\*

**Dún Laoghaire-Rathdown: 1,777** approx per square Km

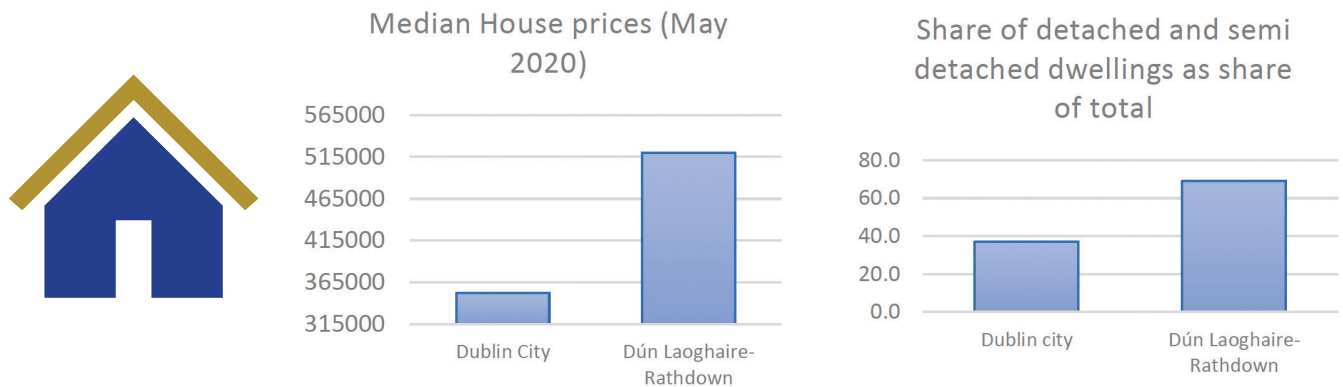
**Dublin city: 4,986** approx per square Km

A key issue, however, is affordability of housing in this area. As figure 13 shows, house prices in the area are very significantly (close to 50 per cent) higher than the national average. There is also a far greater availability of detached and semi-detached compared to the capital. This combination of lower density goes together with a relatively high provision of suburban and urban transport systems. Clearly, there is scope for considerable additional housing investment to take advantage of the availability of such good infrastructure, not to mention what is perhaps the wealthiest endowments of amenities and one of the most beautiful locations in the country.

Where South County Dublin offers potential for industrial commercial retail and office development, Dún Laoghaire's potential along the coastal area to develop niche shopping tourism and amenities offers a chance to unleash the wealth creating potential of one of Europe's most attractive capital city coastline areas.

\* See Annex "Sources and Methodology"

Figure 13 Housing: Prices and availability of detached and semidetached dwellings



## Investing in housing and opportunity

The above potential must be blended with creating more affordable housing so that those who provide services in the area can afford to live there. As a generous provider of tax revenue to the exchequer, Dún Laoghaire-Rathdown citizens deserve to see a return in the form of affordable housing for themselves and their children.

In a post Covid working environment, a clear strategy must exist of ensuring that every local authority area has within it a sufficient stock of housing at close to the national average house price to house a diversity of citizens and workers. Apart from reasons of social harmony, this is necessary to ensure the smooth provision of services – health education and retail – to citizens in a manner that avoids long commutes and a high carbon footprint.

- Investment in a greater variety of housing is a key priority to ensure a good social mix and also opportunities for those growing up in the area to be able to live in it.
- Furthermore, there is an imbalance between amenities available in the eastern, coastal area, of the area compared to its western half. Investment must rebalance this.
- Additionally, Dún Laoghaire-Rathdown houses some of the most affluent suburbs in Ireland. But it also has pockets of under-privilege and economic under-performance. So, another priority must be investment in skills to equalise opportunity by way of professional apprenticeships to diversity employment opportunities.

Now the time has come to invest in that potential in the following ways:

- As an area capable of absorbing more population and suffering high house prices, priorities housing investment in the area for a higher than proportionate level of new housing. With 4.6 per cent of the state's population but the potential to absorb more, more than 2,500 of the 50,000 housing units envisaged in the National Economic Plan should be allocated to Dún Laoghaire-Rathdown.
- A fair allocation, at least 9,000 of the 200,000 jobs committed to under the National Economic Plan.

## A seamless coastal experience from sea to mountains

This area is one of stunning tourist potential, a potential that is within reach provided it is invested in: With tourists increasing opting for a combined urban and rural “experience” over purely urban location holidays, Dún Laoghaire-Rathdown offers tourists one of Europe’s most stunning coastlines together with easy proximity to one of Europe’s most vibrant capital cities – a blend that few cities can boast. To harness this exciting potential, its infrastructure needs further development.

Road and rail commuters in Dún Laoghaire-Rathdown enjoy – at least along its eastern coast and relative to most other parts of the country – a relatively good selection of transport in a north-south direction. However, like other parts of suburban Dublin, connecting and distributing public transport between DART LUAS and between N11, M50 and other parts of Greater Dublin leave a lot to be desired. Access to public transport is relatively good in coastal areas but falls off as one goes inland.

Doing justice to the stunning scenic potential of the area – and giving its inhabitants an alternative to climate unfriendly modes of transport – must have top priority. The area’s relatively modest size should make walking and cycling to and from work or place of study feasible. This will create an integrated experience for tourist and inhabitant alike. Taking the above into account, the following investment priorities are suggested:

- Maximising the potential of the area by targeting it for a higher than proportionate share of housing investment and at least an equal share of new jobs under the National Economic Plan.
- Integrate and link together its impressive amenities through a comprehensive ribbon of walkways and cycling lanes that link Blackrock to Ballybrack and Killiney and Sandycove to Stepside. Use innovative ways to exploit the visual beauty of the area including examining the idea of a cable car from Killiney Hill to Dalkey
- Prioritise the development of an “arc” of carbon friendly public transport services from the coast to inland areas so that east-west transport options and availability approach current availability north-south. This will reduce the need to access the attractive coastal area by car and give commuters more freedom.
- Balance the rich availability of parks and amenities in the east of the area with more investment in its west, (e.g. balancing the investment in Dún Laoghaire library with similar amenities in Sandycove/Stillorgan)

“DLR County Council have actively engaged with the business community, leading, and facilitating numerous initiatives through the LEO office and its expanding Economic Unit. They work very closely with all the Business Associations, the Sandycove Business District and the Chamber to understand and support the needs of the business community in DLR. A significant element of the Government’s business COVID supports have been driven by the Council in DLR, including Trading Online Vouchers, Business Continuity Vouchers and Restart Grants as well as the normal pre-COVID supports. DLR County Council is on track to provide more than €17 million in funding to support businesses in this challenging year. Businesses can go to [www.localenterprise.ie/DLR](http://www.localenterprise.ie/DLR) for more information and to find details of future programs. The Council are committed to working with businesses to maintain DLR as a premier destination.”



# Profile: Fingal and Kildare



Fingal and Kildare, together with South County Dublin and Dún Laoghaire-Rathdown – comprise the current “Greater Dublin Area” and are equally significant in terms of their size and investment needs. Together, these areas constitute a contiguous area containing 1.1 million people, over one fifth of the State’s population, and a higher than proportionate (to population share) contribution to both the economy and exchequer.

## Fingal

Fingal’s population has grown from 273,991 in 2011 to an estimated 310,161 as estimated for 2019 and will approach one third of a million at this growth trajectory by before 2030.



**311,867**  
(estimate)\*

**6.2% of State Pop.**  
**696** approx per square Km  
(estimate)\*

*Figure 14 Population & Population Density of Fingal (2019)\**

Relatively low density, Fingal has a high capacity to absorb further housing investment. The area is a significant business and industrial centre and a pivotal link on the strategic Belfast-Dublin corridor.

## Kildare

Kildare’s population has grown from 210,312 in 2011 to an estimated 233,802 as estimated for 2019 and will approach one quarter of a million at this growth trajectory by before 2030.



**231,092**  
(estimate)\*

**4.6% of State Pop.**  
**136** approx per square Km  
(estimate)\*

*Figure 15 Population & Population Density of Kildare (2019)\**

The area contains some of the most strategically important high technology industries in Ireland. It is also part of a key corridor from central Dublin through South County Dublin to the Mid-East, West, Midlands and South of Ireland.

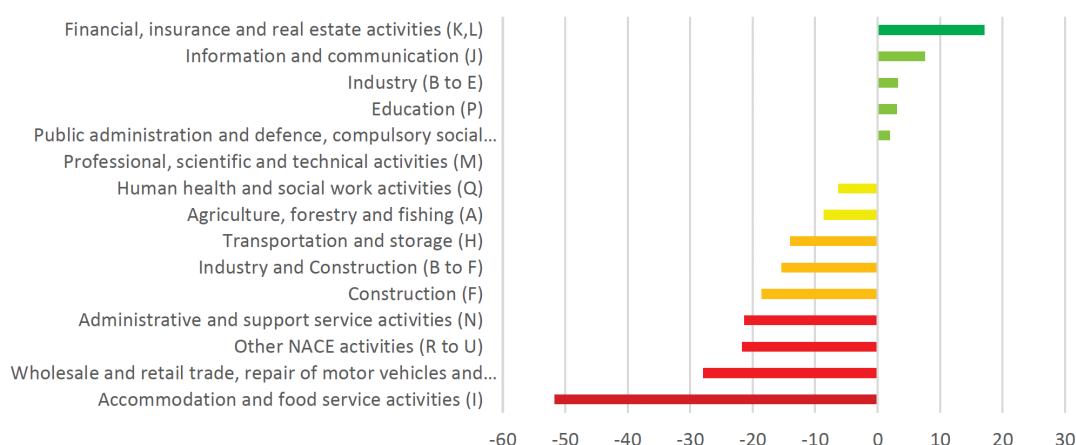
# Covid-19: Economic impact

The Covid-19 crisis has replicated in the space of 3 months a negative economic impact comparable to the first three years of the last recession. As shown by Box Figure 1 below, the economy is expected to shrink by one tenth and job losses to amount between 217,000 and 281,000 over the course of the year. Box Figure 2 further below gives more sectoral detail for 2020 so far. The Labour Force Survey (LFS) for second quarter of 2020 may understate the impact of Covid-19 on the total level of unemployment (see Annex 'Sources and Methodology'), but the changes in sectoral employment do give a fair picture of which sectors are most vulnerable.

	GDP*	Employment loss*
April Stability Programme Update	-10.5%	217,000 approx.
Central Bank of Ireland	-9.0%	281,000 approx.


\*Obtained as follows: For April Stability Programme by subtracting total employment forecast for 2020 from 2019 figure. For Central Bank of Ireland by applying forecast loss in percentage employment to Labour Force Survey total employment estimate for Q4 2019.

**Box Figure 1 Economic and employment forecasts\***



**Box Figure 2 Sectoral employment impact of Covid-19 (job losses/gains)\***

 **138,700**  
nationally

 **42,000**  
in Dublin

**Box Figure 3 Job losses so far in the Covid-19 crisis\*\*\***

\*See Annex 'Sources and Methodology'

\*\* This represents a conservative survey based estimate which regards as "employed" those who were working for at least one hour during the week of the survey. It is used because the more accurate "Covid-19 adjusted" measure is not available for Q4 2019, thus preventing any meaningful comparison

# Covid-19 impact & Needed response:

## South Dublin County

Although comprising one fifth (20.5 per cent) Dublin's population, a comparison of the 2006 and 2011 Census data<sup>3</sup> suggests that of the four local authority areas making up the county, South Dublin is the most vulnerable to unemployment, accounting as it did for over one in four (25.8 per cent) of jobs lost in the last crisis (as measured by comparing 2006 and 2011 census period employment figures). Assuming similar trends in the current recession would imply a loss of at least 10,800 jobs so far as estimated by Labour Force Survey data, but with thousands more, yet uncounted, due to reduced hours or job loss once pandemic payments end.

The figure below (Box Figure 4) shows that, with the exception of Accommodation and Food services, the share of employment in the five next most adversely affected sectors of the economy (see Box Figure 2) in South Dublin is higher than the national average. However, as the chart above also shows, some sectors are experiencing employment growth despite Covid-19 (and to some extent because of it).

Key challenges therefore must be to

- Channel jobs growth into new and emerging growth sectors of the economy.
- Provide joined up public transport and community infrastructure to facilitate labour mobility within and across the area so that workers losing their jobs can more easily find commutable alternative employment close to where they live.
- Retrain and re-skill workers in adversely affected sectors to switch employment.

These challenges are elaborated further below.

**"of the four local authority areas making up the county, South Dublin is the most vulnerable to unemployment"**

*Box Figure 4 Higher shares of employment in vulnerable sectors\**

	National % share	% Share in South County Dublin
Wholesale & Retail, Motor trade	11.6	13.3
Transportation & Storage	3.5	4.5
Admin and support services	3.1	3.8
Other Services	1.8	2.1
Construction	4.4	4.4

## South Dublin Counties fair share of investment, jobs and housing

South Dublin should see the following commitments from Government in the Implementation of Budget 2021 and National Economic Plan and in any reviews of Project 2040 for the Dublin and Mid-East regions:

- Approximately €590 million, based on a Budget 2021 forecast of a total of €10.1 billion in public investment and a 5.8 per cent share of national population (higher if total public investment is higher).
- At least 12,000 of 200,000 new jobs promised in the Programme for Government based on area's job losses to date. A higher share (15,000) is warranted by the area's higher propensity to unemployment during a recession (see above), lower population density, strategic location, and strategic capacity (N7)
- A higher (than population) share of 50,000 targeted new homes given relatively lower property prices and density

3) Census data for employment is available on a county by county basis. \* See Annex 'Sources and Methodology'



# Specific investments

South Dublin County should see targeted investment in the following key areas, both to maximise its existing advantages and to create alternative employment:

**Pharma Clusters** With many of Ireland's leading pharma companies having manufacturing, head office, R&D and logistical operations based in South Dublin County (primarily in Grange Castle and Citywest Business Campuses) we must encourage greater investment to create a critical mass of investment and jobs growth in this growing sector

**Medical Quarter** Further develop the emerging medical quarter in Tallaght which has both a dynamic health element as well as an economic and employment component.

**Retail and Accommodation & Food Services** South Dublin County has great potential to continue to expand its offering in this area with some of Ireland's leading hotels providing business and tourism accommodation and facilities. The Square and Liffey Valley Shopping Centres are key retail and food service anchors in the county and vital amenity hubs for the community. With a strong retail and accommodation offering the county is well placed to grow these industry sectors.

**Tourism** South Dublin County is both a destination with a strong offering and the area's proximity to the city centre and surrounding countryside offers it an added attraction as a connected place to base your visit. Local attractions are being enhanced by investment in the Clondalkin Round Tower visitor centre, Grand Canal Greenway, proposed Hell Fire Club Interpretive Centre, Rathfarnham Castle and investment in public parks and open spaces. Business Tourism and Events Tourism is also attracted to the county by having a convention centre in CityWest and a range of accommodation offerings throughout the county. The county has a number of villages that offer both a visitor attraction and service but also a place to meet and engage with the local community.

## Tallaght Town Centre

The county town offers an ideal environment to further connect business growth, third level learning via TU Dublin (Tallaght Campus), strong community identity, excellent retail and food offering via The Square Shopping Centre. Further investment in the county town to enable more development of office and IT based industries will greatly assist in achieving the growth in employment.

**Data Centres and Technological manufacturing** Data centres and technological manufacturing plants in the area must be intelligently clustered with supporting technological infrastructure, local skills provision combine to make investing in the county a viable and profitable proposition. Programme for Government commitments to providing community based sustainable energy should be applied to the energy needs of data centres. The current strong support by the data centres in the county to support utilising alternative energy sources can be built to support the generation of green energy in the county.

**2nd Generation Logistics hubs and Office Campuses** are attracted to the county by the interconnection and access to key stretches of the M50, N4 and N7, being close to Dublin Port and Airport – not to mention Casement Aerodrome – this gives the county significant advanced logistical potential and the ability to provide the supports for 2nd generation office based logistical supports. Tallaght town centre and the key business parks offer ideal locations for office space, with reduced journey times compared to the city centre and a skilled, growing local labour force locally available.

## The Green Economy

**District Heating Systems** Foreshadowing the Programme for Government's commitment to local sustainable energy supply, South Dublin County Council is in conjunction with private and public partners, championing the use of district heating systems in Tallaght Town Centre. This system can provide heat at a competitive price and a very low carbon impact. Public private partnership investment can be economically and environmentally advantageous for the county. Further investment in the Council's work in this area will have major economic and environmental benefits.

**Public Transport including cycle paths.** Everyone agrees that environmentally friendly transport systems are needed. But we must also look at where they go to and how business and public alike are served by them. The county is challenged in this regard, servicing transport to the city centre and to the rest of Ireland, with increased transport investment for residents within their area or to adjoining counties in Dun Laoghaire, Fingal and Kildare a dynamic and environmentally friendly inter-county transport service can be developed. We must ensure all three areas develop more quickly with more equal availability of public transport, cycle lanes and walkways.

**Solar Energy Park and Geothermal Energy.** South Dublin County has large areas of land that are suitable for large scale solar parks suitable for heating housing, public buildings or business parks and data centres. Solar parks can also contribute to biodiversity enhancing our climate change programme. Consideration could be given to a public private partnership in this area. South Dublin County is geologically positioned to access geothermal energy that could be mined for both business, public buildings and district heating systems if developed.

# Covid-19 impact & Needed response:

## Dún Laoghaire-Rathdown

Dún Laoghaire-Rathdown comprises one sixth of the population and workforce of county Dublin.

A comparison of the 2006 and 2011 Census data<sup>4</sup> suggests that Dun Laoghaire-Rathdown accounted for one in ten of the jobs lost during the crisis. Assuming similar trends in the current recession would imply a loss of approximately 4,200 jobs as estimated by Labour Force Survey data, but with thousands more, yet uncounted, due to reduced hours or job loss once pandemic payments end.

The figure below (Box Figure 5) shows that Dún Laoghaire-Rathdown's share of employment is significantly higher in several sectors including three where employment is actually growing - Information and Communications; Financial and Insurance and Education – and one where it is falling, namely Professional, scientific and technical activities.

The share of employment in both the Accommodation and Food Services and Wholesale and Retail sectors is, surprisingly, below the national average. Dún Laoghaire-Rathdown has the potential to become a major tourism and retail centre and to provide a high tech and lower cost hub for financial service and information and technology sectors that are continuing to grow.

Key challenges therefore must be to

- Exploit the area's obvious potential to generate jobs growth in the provision of high-quality tourism, food services and retail experiences, utilising the area's coastal and mountain assets
- Target the three related sectors of Information and Technology, Financial and Insurance and Education as strategic growth clusters for the area: Dublin's post Brexit status as the only common law financial centre in the EU in which English is the language of business is – together with the region's hard won status as a global hi tech hub- has made growth in the financial services and information and technology sectors so far resilient to recession. This must be exploited by targeting Dún Laoghaire-Rathdown as a potentially relatively lower cost location.
- Use training and Apprenticeship to channel workers from related areas where jobs have been lost (Professional, Scientific and technical activities) into these growth sectors.

*Box Figure 5 Higher shares of employment in growing\**

	National % share	% Share in Dun Laoghaire
Information and Communications	3.9	8.9
Financial and insurance activities	3.9	5.5
Education	7.7	9.7
Professional, scientific and technical activities	4.9	10.8
Accommodation and Food Services	5.1	3.7
Wholesale and Retail	11.6	9.9

\* See Annex 'Sources and Methodology'

# Dún Laoghaire's share of investment, jobs and housing

Dún Laoghaire should see the following commitments from Government in the Implementation of Budget 2021 and National Economic Plan and in any reviews of Project 2040 for the Dublin and Mid-East regions:

- Approximately €465 million of public investment, based on an April 2021 forecast of a total of €10.1 billion. (Stability Update) forecast of a total of €9.1 billion in voted public investment and a 4.6 per cent share of national population - more if public investment is higher.
- At least 9,000 of 200,000 new jobs promised in the Programme for Government based on the area's population share.
- A higher than proportionate (by population) share of the 50,000 targeted new homes given the area's lower population density and relatively high prices indicating, respectively, the capacity and need for new housing.

## Specific investments

Dún Laoghaire-Rathdown should see targeted investment in four key areas, both to maximise its existing advantages and to compensate for heavy losses in retail and below potential employment in tourism:

**Retail** Despite being a natural venue for providing high quality retail experience – and the employment potential that goes with this – retail employment in the area is lower than the national average. Many retail outlets have closed, and many jobs lost like many other parts of Ireland. Like other parts of Ireland, Dún Laoghaire-Rathdown needs a policy of rejuvenating its retail sector that focuses on the village / town centre and on creating or recreating the richness and added value of a shopping experience that blends access – within walking or cycling distance – to multiple retail outlets, leisure facilities and amenities. This type of localised high quality retail environment – if supported by public transport – will enable more carefree shopping and raise the business - and repeat business - potential from tourists who want not just a shopping trip, but a full community experience.

**Green Tourism** As well as one of Europe's most beautiful coastal locations, most impressive suburban architecture and a rich combination of water sports (including sailing, swimming, diving, kayaking and fishing) and mountain activities (climbing, hiking, hill walking and picnicking), Dún Laoghaire-Rathdown has massive potential to become an internationally renowned tourist attraction once tourism resumes. Given the underdevelopment of tourism in the area – relative to potential – there is an exciting chance to start anew with an environmentally sustainable brand of "green tourism". Accordingly, the "Tourism priorities for 2020" outlined in the DLR county Council Tourism Development proposals – including the implementation of the "Destination Towns" projects, the "Tourism Friendly Cities" project, a new Food Trail, a Coastal Trail and better signage and tourism networks – should all be prioritised. Money spent in this area will generate a handsome return from both employment and tax revenues.

**East-West public transport, cycling lanes and walkways** As in South Dublin, Dún Laoghaire-Rathdown carries much commuter and commercial traffic, mainly in a north-south direction, but this needs to be complemented by human friendly transport arteries that link the mountains, sea and parklands together into a more seamless experience for its residents, attract tourists and link it more with the adjacent area of South County Dublin.

**High technology and Professional Services** Given the area's significantly higher than average employment share in sectors that are growing despite Covid-19, Dún Laoghaire-Rathdown has the potential to grow clusters in these sectors using as a base areas like Sandyford, Central Park and Blackrock. Given social stratification in the area – high levels of upper and middle income groups but pockets of poverty – there should be an active effort, using Apprenticeship and social inclusion strategies – to make the area's potential for growth accessible across the social spectrum. It can provide lower cost, lower density (and hence safer from infection) alternative locations for growth in high tech sectors and needs to do so: Despite a lower rate of unemployment than the rest of Dublin, the area will still suffer thousands of job losses – particularly in retail – and needs to compensate for this.

**Exploiting potential but also improving focus of Education and Public transport** The area is well served by primary, by second level and by proximity to third level institutions as well as by vocational (IADT, RCSI, etc) institutions. It is also relatively well served by public transport arteries such as the DART, Luas and bus routes. This enhances the argument for selecting the area as a hub for growth in high tech and professional services employment. However, an improved connectivity of education to job opportunities – particularly for lower income residents – remains a priority. Also, while operating well in a north-south dimension, public transport must (see also above) make east-west car free transport more accessible and open up shopping centres like Dundrum and Cabinteely to car free as well as car using customers.



# Concluding Summary

## From Lockdown to Local recovery

- Instead of just recovering from recession as we did after the last crisis, there is now a need and national desire to use this transition to not recreate a rerun of past recoveries, but a different kind of future: One with safe environments, affordable and sustainable housing, local employment opportunities and education and training, all within easier reach of where we live. By using National Economic Plan properly, that future can be ours.
- With half a million people between them South County Dublin and Dún Laoghaire Rathdown account for one tenth of Ireland's population
- Joining together, South County Dublin and Dún Laoghaire Rathdown are proposing an exciting and imaginative new model for localised recovery – following the lead of the Programme for Government – as a template for other areas around Ireland to follow.
- Drawing on the long-term objectives contained in both Project 2040 and local Community Development Plans this report sets out how we move from Lockdown to local recovery.
- Through town centre led recovery and by investing in well serviced housing sites, public transport (including walkway and cycle lanes) and in strategically selected sectors, Budget 2021 and the National Economic Plan can turn vision into reality. Our analysis clearly shows, even if we did not have an economic crisis, we would still need to take this approach:

### Introducing Greater Dublin: An idea whose time has come

- By adding counties Fingal and Kildare, a strategic, connected zone of 1.6 million people is created.
- This region accounts for one third of the State's population, almost one half of its economic Gross Value Added and three fifths of all tax revenue collected in the state.
- This region already has the fastest growing (in terms of population) local authority areas in Ireland and, according to Project Ireland 2040, the population of county Dublin alone will rise by over one quarter of a million to reach 2 million in the next twenty years.
- We must act now to ensure that the future is not an unsafe, congested, and unaffordable one, but a green, healthy, low cost one based on sustainable local communities.
- This is not the case at present: In South County Dublin, Fingal and Kildare for instance, workers and commuters face far longer commutes than the average citizen.

- As the nation's economic motor, Dublin must and will drive the recovery: With official figures showing hundreds of thousands of unemployed nationally, that task is daunting.
- Equally daunting is the challenge of avoiding socially destructive imbalances in different parts of Dublin that could create a lasting wound of pockets of intergenerational poverty, division, crime and political discord.

### South County Dublin

- At 278,767 as measured in the 2016 Census, South Dublin's population is now approaching 300,000, 6 per cent of the State's population, comparing with combined populations of Cork, Galway and Limerick cities
- The area has lost at least an estimated 10,800 jobs so far in the crisis with the potential loss of thousands more once pandemic payments end and/or of a second lockdown ensues.
- The full implementation of the Tallaght Local Area Plan will unlock further economic and social development.
- Although strategically located connecting central Dublin with the South, West and Midlands of Ireland its' strategic potential – contributed to by relatively lower (compared to central Dublin) house prices and office rents and the latent asset of the SDZs and N7 corridor – provide both social and economic opportunities.
- Increased investment in community infrastructure and distributor public transport systems enjoyed by residents of the city would unlock further growth potential of the county. The heavy investment in making this part of Ireland a gateway is of national benefit and need to be complemented by cross county investment in public transport.
- Increased investment in local third level educational opportunities and increased and diversified job opportunities locally will provide for strong community and economic growth, but the current long-commutes with an adverse carbon impact to education and employment is undermining both of these initiators of economic growth.
- As a matter of economic fairness, but also to use the opportunity to create an exciting new model of localised, green recovery that the rest of Ireland can follow, investment in the area must now be prioritised as follows:
  - The area must receive at least €590 million in public investment
  - An "arc" of public transport from Lucan through Clondalkin and Tallaght and on to Knocklyon and

Rathfarnham must be created to bind the area in the same way the DART binds eastern Dublin.

- The continued development of SDZs and other areas including the N7 corridor must be developed for housing, retail, community and strategic commercial use.
- There should be continued investment in parks and village centres capitalising on their success and exploring further the potential to maximise their community and economic contribution to the county.
- The counties exposure to unemployment – caused by relatively high shares of employment in sectors most vulnerable to the current recession – must be recognised and rectified as follows:
  - Earmarking 12,000 to 20,000 of the 200,000 jobs promised in the Programme for Recovery for the area.
  - Earmarking 3,000 to 5,000 of 50,000 new houses targeted for completion in the Programme for Government. This can be done in the following strategic sectors:
- Pharma Clusters With many of Irelands leading pharma companies having manufacturing, head office , R&D and logistical operations based in South Dublin County (primarily in Grange Castle and Citywest Business Campuses) we must encourage greater investment to create a critical mass of investment and jobs growth in this growing sector
- Medical Quarter Further develop the emerging medical quarter in Tallaght which has both a dynamic health element as well as an economic and employment component.
- Retail and Accommodation & Food Services South Dublin County has great potential to continue to expand its offering in this area with some of Irelands leading hotels providing business and tourism accommodation and facilities. With a strong retail and accommodation offering the county is well placed to grow these industry sectors.
- Tourism South Dublin County is both a destination with a strong offering and the area's proximity to the city centre and surrounding countryside offers it an added attraction as a connected place to base your visit. Local attractions are being enhanced by investment in the Clondalkin Round Tower visitor centre, Grand Canal Greenway, proposed Hell Fire Club Interpretive Centre, Rathfarnham Castle and investment in public parks and open spaces. Business Tourism and Events Tourism is also attracted to the county by having a convention centre in CityWest and a range of accommodation offerings throughout the county. The county has several villages that offer both a visitor attraction and service but also a place to meet and engage with the local community.
- Tallaght Town Centre The county town offers an ideal environment to further connect business growth, third level learning via TU Dublin (Tallaght Campus), strong community identity, excellent retail and food offering via The Square

Shopping Centre. Further investment in the county town to enable more development of office and IT based industries will greatly assist in achieving the growth in employment.

- Developing clusters of Data centres and associated community sustainable community energy networks such as the District heating System being rolled out in Tallaght and exploring the potential of solar and geothermal energy dimensions.

## Dún Laoghaire-Rathdown

- At 218,018 as measured in the 2016 Census, Dún Laoghaire-Rathdown's population is now approaching 250,000, approximately 5 per cent of the State's population, exceeding the urban population of Cork city and matching that of Galway and Limerick cities combined.
- The area has lost an estimated 4,200 jobs with thousands more losses likely once pandemic payment supports end and/or a lockdown is resumed.
- The area is well served by public transport with huge potential as a tourist and retail hub. However, underinvestment in housing has created the highest house prices in Ireland combined with pockets of under privilege and poverty. It is also increasingly difficult for service workers to afford to live in the area.
- There is a chronic need to invest in affordable housing in the area.
- While there has been much investment in car traffic and in public transport, the area's huge potential for tourism requires a much strong integration of its amenities – to create a seamless experience of the area for visitors to its seaside, mountain and public park attractions via well connected walkways, cycling paths, signage and promotion.
- The retail sector in the area has been very hard hit with UK owned shops exiting the market. This lost capacity and employment must be rectified by developing high quality locally owned retail clusters that not dependent on car transport and which support, and are supported by, local community settings linked by good public transport options that link Dún Laoghaire Dundrum, Cabinteely and other areas together.
- The area has higher than average shares of employment in economic sectors that continue to grow, such as financial services and information and communications. Together with its low density relative to central Dublin and its good provision of transport infrastructure, lower office rents and desirable location, this makes it a good location to create clusters of jobs growth compensating for losses in other sectors.
- The area possesses good access to third level educational opportunities but retains pockets of under privilege out of kilter with its status as Ireland's wealthiest local authority area. This points to the need to develop Apprenticeship in the area to promote greater equality of access to employment.

- The area must receive approximately €465 million in public investment, its fair share by population size
- At least 9,000 of the 200,000 jobs promised in the Programme for Government should be targeted for this area, in the aforementioned sectors of Tourism, Retail, Financial Services & Information and Communication.
- The strong "north-south" orientation of its transport infrastructure and public transport provision must be complemented by an "east-west" orientation that connects its coastal to its western side, providing a more seamless mobility both internally for its residents and externally to adjacent areas.



# Annex Sources & Methodology

The Greater Dublin Area, defined for the purposes of this report, comprises of counties Dublin and Kildare. The Mid-East region (NUTS Level 3) comprises Wicklow, Kildare, Meath and Louth.

The definition used in this report reflects the formation of the "Greater Dublin Region Chamber" area by South Dublin Chamber, Dún Laoghaire Rathdown County Chamber, Fingal Chamber and Kildare chamber. For completeness and as is relevant data is also included for Dublin city council area.

- Figure 1 The share of the Irish economy accounted for by the Greater Dublin Area is calculated using 2018 Gross Value Added (GVA) for Dublin and adding a proportion of GVA the Mid-East region based on Kildare's share of the Mid-East region's tax revenue (Revenue Commissioner Exchequer revenue by County, 2019).
- Figure 1 The population figure given for the Greater Dublin Area is based on applying the national rate of population growth between 2016 and 2019 based on CSO national level population estimates (April 2019) and scaling it before applying to population levels for the four Dublin local authority areas and Kildare. The scaling factor is derived by dividing the population growth for each local authority area between 2011-2016 by the national population growth for the same period (assuming relative growth rates are stable in the ensuing 3-year period).
- Figure 1 The share of tax revenue accounted for by the Greater Dublin Area is calculated using Revenue Commissioner net receipts on a county by county basis for 2019.
- Figure 2 Data is CSO Census (2016 and 2011)
- Figure 3 Data is CSO Labour Force Q2 2020. Employment for the Greater Dublin Area is calculated by applying Kildare's share of employment in the Mid-East region as measured in the 2016 Census (the latest county data available); 33.2%, applying this factor to the latest Labour Force figures for the Mid-Eastern region and adding the result to the Labour Force Dublin total.
- Figure 4 CSO Census (2016)
- Figure 5 CSO Q2 2020 Labour Force Survey
- Figure 6 CSO Labour Force survey
- Figure 7 CSO Labour Force survey
- Figure 8 Budget 2021 forecast for Gross Voted Capital Expenditure
- Figure 9 CSO Census data (at county level) and 2019 Population projections (at regional level). Estimates for 2019 populations use relevant regional growth rates for 2016 to 2019 and estimate the rate of growth in each county for that period by calculating scaling factors based on country population growth data for the 2011 to 2016 period compared to the growth rate at regional level. So, for instance the population for South Dublin is obtained by examining the rate at which its population grew in the 2011 to 2016 period (for which data is available at a county level) compared to growth rate for Dublin county (including city) for the same period. The resultant factor is then used to scale the growth rate for Dublin for 2016 to 2019 to produce an estimated growth for South Dublin in that period and, by applying it to the 2016 county totals, an estimated 2019 population level. Population density are calculated from above calculations and Ordinance Survey data.
- Figure 10 CSO Residential Property Price index, May 2020
- Box Figure 1 Sources: Central Bank of Ireland Q3 Bulletin scenario,
- Box Figure 2 The Labour Force Survey is likely to understate the full unemployment impact of Covid-19 for several reasons:
- Firstly, it is a sample-based survey rather than a complete coverage of the working population
  - Secondly, it counts as "employed" those who have worked one hour or more during the survey period.
  - Thirdly, the methodology in the Labour Force Survey will count as "employed" those workers on pandemic support payments that will, from early next year, be phased out leading to a likely increase in unemployment.
- Nonetheless changes in Labour Force Survey totals over the period provide good guidance as to the relative impact of Covid-19 on different areas compared to other regular indicators of unemployment which are not available on a county basis
- Box Figure 3 Data from Labour Force Survey for Q2 2020 compared to Q4 2019.
- Box Figure 4 Data from 2016 Census
- Box Figure 5 Data from 2016 Census



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