An Economic Audit of South Dublin County 2004

Prepared for

South Dublin County Development Board

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This economic audit of South Dublin County is an objective in the County Strategy 2002-2012 of South Dublin County Development Board,
South Dublin: A Place for People.

South Dublin County Council is the lead agency on the development of this action. The objective stated in the County Strategy is to:

"Conduct an audit of the assets of the county to develop an economic profile"

The partner agencies identified in the County Strategy were Enterprise Ireland, Forfás, IDA Ireland, and South Dublin Chamber of Commerce. South Dublin County Council would like to express appreciation for their valuable contributions.

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List of Acronyms and Abbreviations

ADM	Area Development Management Ltd
AITs	Area Implementation Teams
CDB	County Development Board
CEB	County Enterprise Board
CER	Commission for Energy Regulation
CIP	Census of Industrial Production
CPG	Corporate Policy Group
CSF	Community Support Framework
CSO	Central Statistics Office
DBIP	Dublin Bioscience and Innovation Partnership
DCU	Dublin City University
DMR	Dublin Metropolitan Region
DSL	Digital Subscriber Line
DTO	Dublin Transportation Office
EA	Enterprise Action
ED	Electoral Division
EEA	European Economic Area
EFTA	European Free Trade Association
ESB	Electricity Supply Board
ESDP	European Spatial Development Perspective
ESRI	Economic and Social Research Institute
EU	European Union
FDI	Foreign direct investment
FMCG	Fast moving consumer goods
HPSU	High potential knowledge-based start-up
IAPs	Integrated Area Plans
ICT	Information and Communication Technology
IMD	Institute for Management Development
ITT	Institute of Technology, Tallaght

List of Acronyms and Abbreviations

LMS	Logistics management services
LO/LO	Load On/Load Off
MANs	Metropolitan Area Networks
MNCs	Multinational Companies
NACE	NACE Rev.1.1 is a statistical classification of economic activities. NACE is an acronym for 'Nomenclature générale des activités économiques dans les communautés européennes' (General Industrial Classification of Economic Activities within the European Communities).
NDP	National Development Plan
NSS	National Spatial Strategy
OECD	Organisation for Economic Co-operation and Development
ORR	Outer Ring Road
POP	Point of Presence
PURs	Polycentric Urban Regions
R&D	Research and development
RAPID	Revitalising Areas by Planning, Investment and Development
RED	Rural Enterprise Development
RO/RO	Roll On/Roll Off
SAPS	Small area population statistics
SDC	South Dublin County
SDCC	South Dublin County Council
SDZ	Strategic Development Zone
SPC	Strategic Policy Committee
UCD	University College Dublin

Introduction

The main objective of this report is to provide an audit of the assets of South Dublin County so as to develop an economic profile of the county. The recommendation to undertake such an audit was outlined as a key priority in *South Dublin: A Place for People - An Integrated Strategy for the Economic, Social and Cultural Development of South Dublin County 2002-2012*, the county strategy of South Dublin County Development Board.

The report is divided into seven main parts. Part 1 provides a contextual overview of the county, with particular attention to the underlying dynamics and impacts of the restructuring that has occurred since the 1990s. Issues of land use and zoning, demographic changes and the emergence of new centres of population growth are addressed in this opening part of the report. Part 2 focuses on the socio-economy, using small area census data to illustrate and analyse patterns of unemployment. This is followed by an overview of recent initiatives aimed at urban renewal and the re-development of disadvantaged areas. Part 3 examines the critical infrastructure within the county, focusing on the transport and telecommunications infrastructure, water supply and waste management systems, and the gas and electricity distribution and transmission networks. The characteristics of the local labour market and the educational infrastructure are examined in Part 4. Part 5 provides a profile of the local economy. This part of the report examines the sectoral breakdown of economic activities and employment within the county, the geographical distribution of industry, the role of FDI, and job creation and enterprise development. Part 6 addresses the issue of local governance and the final conclusion is presented in Part 7.

Executive Summary

Geographic Location: South Dublin County forms part of the Dublin metropolitan region. The county occupies a total land area of 22,301 hectares and has borders with the three other local authority areas in Dublin: Dublin City, Dun Laoghaire-Rathdown, and Fingal. It also has borders with County Wicklow, County Meath and County Kildare. Together these form the *Greater Dublin Area*.

Economic Growth and Development: The county has experienced remarkable economic expansion over the last decade. This growth reflects the strong performance of the Irish economy since the 1990s, and particularly the strong economic performance of the Greater Dublin Area.

Land Use and Zoning: At present there are 1,286 hectares of net industrial zoned lands in the county. Most of the developed industrial and office-based lands are located in the older industrial areas of Tallaght, Clondalkin, Ballymount and Bluebell in the east of the county. These areas are close to the city and strategically located along the Naas Road and the M50 motorway. Outside of this main cluster, there is significant development of industrial and office-based lands in the western part of the county – in the newer industrial areas of Greenogue, Grange Castle, Baldonnel and Citywest.

As of March 2003, three hundred and eighty-three hectares (29.8%) of lands zoned for industry remain undeveloped. When developed, these industrial lands have the potential to provide a major source of new employment within the county. Most of the undeveloped lands are in the newer industrial areas of Greenogue and Baldonnell, and in the two recently developed international business parks at Grange Castle and Citywest.

Demographic Change: The population of the county in 2002 was 238,835. This represents 6.1% of the total national population of 3.92 million. The population grew by 9.2% over the 1996-2002 period. Forty-one per cent of the population in South Dublin County is aged less than 25 years, compared with 36.9% for the whole of the Dublin area.

Lucan has the highest percentage of the population aged under 44 (82.44%), followed by Firhouse (77.92% aged <44), Clondalkin (77.1%) and Tallaght (74.65%).

Physical Infrastructure: The County has an excellent transport and telecommunications infrastructure. The M50 motorway links South Dublin County to Dublin Airport and to other national primary routes including the N7 (which connects South Dublin County to the southwest), the N81 which links south to Wexford, the N4 which connects to the West, and the M1 which links to Belfast. To meet the challenge of a growing economy and a rapidly increasing demand for travel within the region, significant investment has been made to improve the transport infrastructure. The improvements in the road network, the LUAS on-street light rail line, and the introduction of Quality Bus Corridors, are some indicators of the progress made during the past decade.

In the area of telecommunications, high levels of capacity and carriers (such as Eircom, Esat BT, ESB Telecom, NTL, and Cable & Wireless) have resulted in strong competition and competitive prices in the telecommunications sector. The National Digital Park is located in the Citywest Business Campus, and is the landing place for global crossings of fibre optic cable. It is the state's point of presence for transatlantic fibre, providing a direct fibre link to 24 cities in Europe, the US, South America and Asia Pacific. Apart from the transport and telecommunications infrastructures, the county has excellent gas and electricity distribution and transmission network infrastructures and efficient water supply and wastage management systems.

Labour Force: The size of the labour force and the labour participation rate both increased over the 1996-2002 period. In 2002 the labour force consisted of 119,632 persons. There were 110,101 employed, representing 92% of the labour force, and unemployment stood at 9,531 (8% of the labour force). The size of the labour force increased from 97,455 in 1996 to 119,632 in 2002, an increase of 23%. Over the same period, the rate of unemployment in the county decreased from 14.9% to 8%.

The labour force participation rate in South Dublin County is 3.4% higher than the average for the Dublin Metropolitan Area. Between 1996 and 2002 the labour force participation rate increased by 3.5%. The female participation rate increased by over seven percentage points during this period, from 46.9% in 1996 to 54.3% in 2002. The female participation rate is the second highest in the Dublin Metropolitan Region and is expected to increase further over the next decade. Along with immigration, it will be a main factor contributing to the increase in the labour force over the coming decade.

Education and Skills: A breakdown of the labour force by occupational grouping showed that in 2002, 33% cent of people were employed in the two highest skilled categories (professional workers and managerial and technical workers) and only 14% in the two lowest skill groupings (the semi-skilled and unskilled categories). The percentage of the labour force in the high skilled category increased by 6% between 1996 and 2002, while the percentage of the labour force in the two lowest skill categories decreased by 5%. The changing skills profile within the county viz. the upgrading of the workforce, is mirrored in the increase in educational qualifications within the county over the same period.

The level of educational attainment of the population[1] of South Dublin County improved considerably over the period 1996-2002. In 1996, 23% of the county population had only a primary level education and 19% had obtained a third level qualification. By 2002, 22% of the population possessed a third-level qualification, and only 14% had a primary level of education. The county has an excellent education system with well-functioning links between industry, third level institutions, and government. There are 94 primary schools and 32 second-level schools. The provision of third level educational facilities is biased towards Dublin, with 42% of third level facilities and college places located within the region. There is also a vibrant human resource consultancy network operating in the county which may be used to identify and recruit skilled professionals in a range of sectors, including finance, ICT, engineering, and science.

[1] This is defined as persons aged 15 years and over.

Educational Specialisation: By comparison with the other local authority areas, South Dublin County has the highest percentage of graduates in the categories of (i) computing and information technology, (ii) education, physical sciences and chemistry, and (iii) engineering and architecture. One fifth of all third level qualifications in South Dublin County are in the 'social sciences, business and law' category. This reflects the importance of the business services sector as a source of employment in the county. The next most important category is engineering and architecture (with 10.6%), followed closely by medical related qualifications (9.9%) and computing and information technology (7.7%). The occupations that are predicted to experience the greatest growth over the coming years (to 2010) are those of computer professionals, health professionals, childcare, software engineers and business and science professionals.

The Economy: There are an estimated 6,377 businesses in the county. There are 39 industrial estates and 46 business parks and these industrial areas account for 2,241 firms. The *National Digital Park* is situated in the *Citywest* campus and is a hub for high-technology communications and electronic commerce companies in Europe. The second major international business park, *Grange Castle*, is situated in the north west of the county and is a major location for multinational activity. It is home to two of the worlds leading healthcare producers, Wyeth and Takeda.

Foreign Direct Investment: Foreign Direct Investment (FDI) is an important contributor to the local economy. Multinational corporations are the backbone of the internationally traded sectors (both services and manufacturing) and exert a strong multiplier effect on the rest of the local economy through their influence on local employment and the demand for non-traded services.

Growth Sectors: The growth sectors in the county are biotechnology, pharmaceuticals, metals and engineering, ICT, hospitality, transport and logistics, and internationally traded services. The biotechnology, pharmaceuticals, ICT and metals and engineering sectors are highly export-oriented; these advanced sectors account for more than 60% of manufacturing employment within the county.

Sectoral Specialisaton: Employment is concentrated in the internationally-traded services sector and the non-traded services sector. Agriculture accounts for less than 1% of employment and manufacturing industry for just over 13% of employment. Within the services sector, the *wholesale and retail trade* and the *real estate, renting and business activities categories*, are the most important. Other important service sector activities include transport, storage and communications; health and social work; public administration and defence; banking and financial services; and education. The county continues to be the logistics hub of the Dublin Metropolitan Region. Warehousing/logistics firms accounted for 34% of all rateable accounts in 2004 (1,937 out of a total of 5,697 rates). Warehousing and distribution facilities are concentrated in the Tallaght and Clondalkin areas. However, there is evidence of a shift of warehousing and logistics activities to the outer suburbs, to areas such as Newcastle and Rathcoole within the county, and further beyond to counties Fingal and Kildare. With continued economic growth and increasing pressures for space in prime locations, it is likely that warehousing and distribution activities will shift to more peripheral areas, leaving space for more labour-intensive, high-value added service activities in central locations.

Internationally-traded Services and Manufacturing: In 1996 manufacturing industry accounted for almost one fifth (19.47%) of employment within South Dublin County; however, by 2002 employment in manufacturing declined by 6.4% (from 16,157 in 1996 to 14,390 in 2002). The services sector increased over the same period. However, the manufacturing sector, which is highly export-oriented and highly sophisticated technologically, continues to be vitally important. Along with the internationally traded services sectors, the local economy is dependant upon the output and employment performance of the manufacturing sector. These internationally traded sectors (both manufacturing and services) provide the economic foundation for the development of the non-traded services sectors of the economy and without them employment growth in the public sector and local services will be unsustainable.

Innovation and Enterprise Development: The promotion of industry in the county is facilitated by a wide variety of institutions and training organisations, including IDA Ireland, which focuses on the promotion of foreign investment in the Irish economy and its counterpart, Enterprise Ireland, which seeks to foster the development and growth of the domestic industry base. South Dublin County Enterprise Board, the South Dublin Chamber of Commerce and a number of local enterprise centres in Neilstown, Brookfield, Bolbrook, Oldbawn, Killinarden, Bawnogue and Lucan, as well as the Institute of Technology, Tallaght, are also active in the promotion of enterprise. Over the period 2001-2003, local enterprise centres supported 647 start-ups in South Dublin County. The majority of these start-up enterprises were in the services sector and covered a broad spectrum of activities, including software and telecoms, business consultancy, advertising and market research, architectural design, engineering, childcare, transport, catering and recycling.

Regulatory Environment: The regulatory and institutional environment in South Dublin County (as in the rest of the Irish economy) is conducive to wealth and employment creation. The standard rate of corporation tax is 12.5%, which is the lowest rate of corporation tax in Europe. EU membership also allows for the free movement of goods, services, capital and labour within the EU. Recent changes in the 2004 Finance Bill are indicative of the economy's pro-business environment. In the 2004 Finance Bill, the 9% tax charged on the transfer of intellectual property was abolished, encouraging companies to carry out R&D and/or manage intellectual property in Ireland. The two state agencies, IDA Ireland and Enterprise Ireland, provide a variety of assistance to companies in the form of advice, financial support, management development programmes, and funding for research and development. High levels of government support and extensive linkages between innovative firms and institutions (including educational institutions) have brought considerable benefits to the region.

Local Governance: Local government is implemented through South Dublin County Council, which is the political forum of South Dublin County. The Council has responsibility for a wide number of services/functions, including planning and economic development; housing; transportation; sport, recreation and community development; arts and culture; the development and maintenance of parks; and water, drainage, waste mananagement and environmental services. Following the reorganisation of local authority areas in the Dublin Metropolitan Region in 1994,[2] South Dublin County Council has played a leading role in the development of the county, in the area of infrastructural development and in the economic, social and cultural spheres. From a governance perspective, the establishment of the *South Dublin County Development Board* in 2000 as part of local Government reform, was a critical development. The Board comprises members of local government, representatives of local development agencies, the social partners (employers, trade unions, farming and the community and voluntary sector), and representatives of the state agencies. It seeks to promote economic, social and cultural development within the county by co-ordinating and integrating the activities of the various institutions and organisations within the county, including the delivery of services by the individual agencies. By integrating the policy-making process and co-ordinating service provision, it provides a key focus for strategic development within the county. In 2002, the South Dublin County Development Board published the County strategy. The County Strategy was framed after an extensive consultation process involving all stakeholders and reflects the broad consensus as to the future development needs of the County over the period 2002-2012.

Urban Renewal and Re-development: While South Dublin County has benefited greatly from the continued economic boom, some areas of the county remain disadvantaged. The main communities experiencing social exclusion are in North Clondalkin and South-West Clondalkin (the electoral divisions of Moorfield, Rowlagh, Cappaghmore and Dunawley), as well as West Tallaght (including the areas of Killinarden, Jobstown and Fettercairn). A number of Government schemes aimed at urban renewal and the re-development of disadvantaged areas have been initiated and have achieved very positive results. The *Partnership Companies,* the *Integrated Area Plans (IAPs)* and the *RAPID* programmes, are among the main mechanisms designed to address the problems of social

[2] Refer to p.1.

exclusion within these areas. Social disadvantage is a multi-faceted phenomenon and a major challenge to all service providers in South Dublin County in the coming decade is the alleviation of social and educational disadvantage in some parts of the county. Economic growth, job creation, competitiveness, and social inclusion, may be regarded as four cornerstones of development.

Part 1. South Dublin County: An Overview

1.1 Introduction

South Dublin County forms part of the Dublin metropolitan region. Located to the west and southwest of the country's capital city, it occupies a strategic position, regionally, nationally and internationally. The County, which includes 49 Electoral Divisions (EDs),[3] was established in 1994. The Local Government Act of 1993 made provision for the establishment of three new County Councils in Dublin – Fingal, Dun Laoghaire-Rathdown and South Dublin. Along with Dublin City Council, which caters for the city, the three new counties form the Dublin Metropolitan Region. After Fingal, South Dublin County is the second largest county in the Dublin metropolitan area (in geographical terms) and the third largest local authority in the State. The County Council headquarters is located in Tallaght Town Centre, which is the administrative capital of South Dublin County.

1.2 The South Dublin County Landscape

The county occupies a total land area of 22,301 hectares and has borders with the three other local authority areas: Dublin City, Dun Laoghaire-Rathdown, and Fingal. It also has borders with County Wicklow, County Meath and County Kildare. Together these form the *Greater Dublin Area.*[4] Figure 1.1 shows the main built up areas of the county and the landscape character areas.

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[3] Appendix A provides a list of the 49 EDs in South Dublin County. An Electoral Division (ED) is a division of territory made for administrative, electoral, or other purposes. A map of the EDs is also included in Appendix A.
[4] The Greater Dublin area incorporates the geographical area of Dublin City, Fingal, Dun Laoghaire-Rathdown, South Dublin County, and Counties Kilare, Meath and Wicklow.

Figure 1.1 South Dublin County

The main built-up areas are Tallaght, Clondalkin, Lucan, Palmerstown, Terenure, Rathfarnham and Templeogue. The rural area includes the EDs of Bohernareena, Ballinascorney, and Newcastle in the south and south western edge of the county. Although the rural area of the county, which includes the mountains, occupies almost 60% of the total land area of the county, only a very small percentage of the population (2.9%) reside there.[5] This part of the county is quite fertile; it is characterized by lush green pasturelands, woodlands, forests and valleys, with the Dublin and Wicklow mountains dominating the scenery to the South East.

The main landscape areas are dispersed throughout the county and include the four large regional parks at Tymon Park (Tallaght), Corkagh Park (Clondalkin), Griffeen Valley Park (Lucan) and Dodder Valley Park (Tallaght/Rathfarnham). There are 30 regional and neighbourhood parks and the remaining expanse of open space, especially to the South and South west of the county, along with the major amenities of the Dublin and Wicklow mountains, represent a major environmental resource. The county also contains a large number of buildings, structures and sites of historical and artistic importance. It has an important built heritage with 391 Protected Structures, including a number of recorded monuments, as well as numerous archaeological sites. This rich archaeological and architectural heritage is a valuable resource that contributes to the historical character and cultural heritage of the county.

1.3 Growth and Development within the County

The recent expansion of South Dublin County reflects developments within the larger Dublin region and within the Irish economy generally. Ireland is a small, open, trade-dependent economy. In 2002, more than 90 per cent of goods and services produced in the economy were exported. The main areas of growth in Irish exports are in the

[5] The population of the rural area of the County in 2002 was 6,948 people.
The mountains occupy a large amount of land area to the south east of the county and they reduce the amount of land available for future development.

computers/electrical machinery and chemicals/pharmaceuticals industries. South Dublin County has played a major role in these growth sectors. As part of the Greater Dublin Area it has been a key engine of Ireland's economic growth.

The strong performance of the Irish economy over the past decade has accelerated the growth process in the Dublin region and placed increased demands on the region's infrastructure. With increased levels of traffic congestion in Dublin City along with environmental pollution, higher house prices and increased pressure on the physical infrastructure, recent years have witnessed a growing shift away from the city into the surrounding county areas. In South Dublin County, the main objective of the County Council is to contain the process of urban sprawl through the preservation of green belt areas and proper planning designed to retain the distinctive character of towns and villages within the county. The County Development Plan 2004-2010 outlines various measures designed to control the development process and to improve the architectural design and the aesthetic qualities of the built environment.[6]

1.3.1 Towards A Polycentric Model of Development

Until recently, the principal model of development has been low-intensity, segregated-use, suburbanisation. The expansion of the suburbs was facilitated in the past by the relatively cheap and plentiful supply of serviceable land in close proximity to the city. Some of the older areas of South Dublin County, notably Terenure, Templeogue and Rathfarnham, remain closely connected to the city. However, while Dublin City continues to exert strong centrifugal forces on the surrounding areas, developments in recent years represent attempts to break away from core-periphery model of development and to contain the process of urban sprawl by moving towards a *polycentric model* of development.

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[6] These measures are outlined in Chapters 5, 6, 8, 9, 11 and 12 of the County Development Plan 2004-2010.

The concept of polycentric development is central to the *National Spatial Strategy* *(NSS)*[7] and to the *European Spatial Development Perspective* *(ESDP)*.[8] At the national level, the basic idea is to promote balanced regional development through the development of multiple cities (or centres) leading to a process of decentralization. A guiding principle for strategic planning aimed at promoting multiple growth zones is the redirection of resources from core to periphery areas and the encouragement of regional specialisms.[9] At an intra-urban level, polycentric development is similarly concerned with the development of local, self-contained towns and villages. The polycentric city often consists of a larger centre and a number of concentrated subcentres. The closer matching of where people live with where they work, so as to reduce the demand for travel, is a vital part of this spatial approach.

In the South Dublin County context, as the process of economic growth places increased demands on the Dublin City's infrastructure, a major planning objective is to reduce the pull of economic activity towards Dublin City through the development of Tallaght Town Centre,[10] and the development of sustainable urban communities in the major towns and villages of the county. Sustainability is a core concept in the NSS and is adopted as a

[7] The National Spatial Strategy 2002-2020 is a 20 year planning framework designed to guide policies, programmes and investment over the coming years. The primary objective of the NSS is to achieve a better balance of social, economic and physical development.

[8] The ESDP promotes the development of Polycentric Urban Regions (PURs) i.e. multiple cities or growth zones across the EU. This spatial approach to planning seeks to alleviate the problems associated with the excessive centralization of economic activity in a small number of areas, by dispersing economic activity across a number of cities. At an EU and national level, polycentric development is viewed both as the answer to regional problems and as a socio-economic policy goal.

[9] Part of the reason for promoting regionally balanced development is to increase competitiveness by avoiding the problems - and higher costs of transport, labour and other services - that arise when economic activity becomes centralized.

[10] A new Town Centre Masterplan is being prepared by the Council for the development and extension of Tallaght Town Centre. The plan proposes the development of new streets and civic spaces and a range of facilities appropriate to a town centre, including retail, commercial, residential, recreational, community and cultural activities, based on high quality urban design. It will foster the development of a 'cultural quarter' within the county, through the building of a new County Arts Centre, adjacent to the existing Civic Theatre and the County Library.

central principle in a range of strategic spatial planning initiatives, including the Regional Planning Guidelines for the Greater Dublin Area (2004).[11] The concept captures the idea that the economic, social and environmental dimensions of development are interdependent. Sustainable development is development that contributes to the evolution of socially integrated communities in both urban and rural areas while avoiding adverse impacts on the environment. The latter involves minimizing the consumption of non-renewable resources and reducing distance from employment, leisure and other service facilities, in order to reduce traffic congestion, fuel consumption and pollution.

South Dublin County already has a strong network of existing and developing urban centres, including the towns of Lucan and Clondalkin, urban villages such as Palmerstown, Rathfarnham and Templeogue, and rural villages such as Brittas, Newcastle, Saggart and Rathcoole. These distinct towns and villages are in reasonable proximity and the existing and proposed transport networks are designed to facilitate inter-connections and cross commuting between these urban towns and villages.

A recent development within the county is the Adamstown Strategic Development Zone (SDZ). Adamstown is located in the north west of the county and is indicative of a new approach to the design, layout, and servicing of new neighbourhoods in the county. The new model of development is based on a traditional urban town and village format. It comprises a mix of properties for residential, commercial, and community uses, with a lively and interconnecting network of streets, squares, public parks and gardens – all in close proximity. Rather than a 'housing first approach', the simultaneous development of the physical, social and cultural infrastructure - including schools and other service facilities – is a key element of the new approach to planning.[12]

[11] The principles of sustainable development have been adopted by the Irish Government and by Local Government within the Greater Dublin Area, and have been endorsed as the basis for future planning and development.
[12] The County Development Plan 2004-2010 outlines various measures designed to improve the architectural design and the aesthetic qualities of the built environment. These measures are outlined in Chapters 5, 6, 8, 9, 11 and 12 of the County Development Plan 2004-2010. An audit of the existing housing stock in the county and of future

1.4 Land Use and Zoning

At present there are 1,286 hectares of industrial zoned lands in the county.[13] These lands are designed "to provide for industrial and related uses" and come under industrial zoning objective 'E' on the County Development Plan map (refer to Appendix B – Industrial Zoned Lands). Most of the developed industrial and office-based lands are located in the older industrial areas of Tallaght, Clondalkin, Ballymount and Bluebell in the east of the county. These areas are close to the city and strategically located along the Naas Road and the M50 motorway. Outside of this main cluster, there is significant development of industrial and office-based lands in the western part of the county – in the newer industrial areas of Greenogue, Grange Castle, Baldonnel and Citywest.

As of March 2003, three hundred and eighty-three hectares (29.8%) of lands zoned for industry remain undeveloped.[14] When developed, these industrial lands have the potential to provide a major source of new employment within the county. Most of the undeveloped lands are in the newer industrial areas of Greenogue, Grange Castle, Balldonnel and Citywest. In 2001, 74% of the total land recorded as undeveloped was in these areas. A survey of industrial zoned land identified five industrial areas that were less than 50% developed; these were Greenogue (37%), Grange Castle (33%), Citywest (37%), Quarryvale (39%) and Calmount Park (50%). The first three areas are in the western part of the county and account for 451.5 hectares (or 39%) of all the net industrial-zoned land in the county; the other two areas, Quarryvale and Calmont Park, are located in the east of the county. Analysis of undeveloped lands by electoral division showed that Tallaght (Fettercairn), Clondalkin (Dunawley), Newcastle and Lucan-Esker,

housing needs is provided in South Dublin County Council's Report "*A Place to Live: Action Plan for Social and Affordable Housing 2004-2008" (November, 2004).*

[13] Source: Niall O'Byrne, Senior Planner, South Dublin County Council.

[14] This information is based on a partial up-date of a survey carried out by the County Council in 2001. The title of the survey is *An Industrial Zoned Land Survey 2001*. This report will be up-dated in 2005.

accounted for almost three-quarters (73%) of undeveloped industrial land within the county.[15]

1.4.1 Industrial Zoned Lands

With the exception of Grange Castle Business Park, which is owned by South Dublin County Council, most of the industrial zoned land in the county (more than 90%) is owned by the private sector and private developers determine how and when it is developed.[16] Most construction developments in recent years relate to the development of greenfield sites although some re-development of brownfield sites has occurred. Warehousing is the main use throughout the county, followed by industry and office-based activities, but the market is shifting and the respective share of these three activities is changing.[17] Recent developments include a shift from industrial use i.e. industrial/warehousing-type uses, to 'office-based development' - a category of land use first introduced in the 1998 County Development Plan.[18] Over the period 1998-2001, permission was granted for 123,874 square metres of floorspace for office-based development.[19] While 33% of applications related to new Greenfield areas, 61% of applications originated in areas already developed for warehousing/industry activities, indicating a displacement of industrial/warehousing uses by office-based industry.

The 2001 *Industrial Zoned Land Survey* (table 1, p.8) found that warehousing accounted for 43.7% of floorspace, industry for 34.8% and offices for 9.8%. Compared to 1995, the

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[15] Source: Derived from Appendix 3, p.21, *An Industrial Zoned Land Survey 2001.*

[16] Developments nevertheless are guided by, and must be in accordance with the constraints imposed by South County Council.

[17] For example, some large warehousing and distribution companies have moved their premises further away from the city, to areas such as Newbridge and Naas in Co. Kildare. Recent developments, which include an increase in applications for office-based industry along the LUAS line, reflect market land values as well as the changing nature of industrial activity within the county.

[18] Land designated for *industrial use* may have office use of not more than 20% of total floor area ancillary to the industrial or warehousing facility. This category of land use does not allow for stand-alone office facilities.

[19] Source: An Industrial Zoned Land Survey 2001, p.13. A total of 26 applications were received over the period January 1998 to September 2001.

share of warehousing in total floorspace had declined. From an employment perspective it is important to note that while warehousing accounted for 43.7% of industrial floorspace in 2001 - and for 34% of all rateable accounts in 2004[20] - the transport, storage and communications sector accounts for less than 8% of employment within the county.[21] Warehousing takes up large amounts of space but compared to office-based industry records low densities of employment.[22]

Warehousing activities are, nevertheless, a necessary and important part of all retail and manufacturing activities within the county i.e. they support the retail, distribution and manufacturing sectors. This sector is also changing. The development of e-commerce and the increased globalisation of economic activities have opened up new opportunities in the area of logistics management services, which encompasses the higher value-added supply chain management functions - such as planning, procurement, distribution, and inventory and information management. Value-added logistics activities are growing in importance especially in the computers, electronic components, non-bulk pharmaceuticals and fast moving consumer goods (FMCG) sectors. South Dublin County is already a logistics hub in the Dublin region and there are opportunities for firms to move up the value chain and specialise in supply chain and logistics management functions. Some firms are already at the forefront of developments, using sophisticated computer systems to manage and support the international operations of multinationals in the computers and pharmaceuticals sectors, and the growing number of Irish multinationals. Even though the company's clients may be operating from outside the country, the management of their global logistics operations is done from Dublin. As in other sectors, ICT enables disaggregation of industry activity chains with call-centres and back-office functions outsourcing being manifestations of this. Compared to traditional warehousing-type activities, logistics management services (LMS) require greater

[20] Refer to table 5.5, p.71 on local authority rates.
[21] Refer to table 5.1, p.62 which provides a breakdown of employment within the county by broad industrial category, using the 2002 census.
[22] However, because office-based industry is more employment intensive it may only be permitted where public transport and roads and parking facilities are adequate to support these activities.

sophistication, much higher levels of skills (especially ICT skills), the use of computer-integrated business solutions and the ability to manage complexity. Given South Dublin County's strategic position within the Dublin region, logistics service providers within the county could potentially be leveraged to develop and gain competitive advantage in this area.

1.4.2 Office-Based Industry

In the South Dublin County Council's County Development Plan (2004-2010) greater importance is given to the provision of lands for office-based industry. This is in keeping with the shift from manufacturing to services industry within the county. Office-based industry includes activities such as data processing, software development, logistics services management, telemarketing, and research and development. Significant employment opportunities exist in these sectors. The promotion of office-based activities is facilitated through the provision of serviced lands in (i) enterprise and employment zones within town and district centres, and (ii) business and technology parks in the county. Given the projected increase in the labour force in South Dublin – it is projected to increase by 10,157 to 129,789 by 2010[23] – additional lands have been zoned for business use in Greenogue, Grange Castle and lands near Baldonnell.[24]

The increase in provision of serviced lands in the county reflects and is in part a response to developments within the wider Dublin Metropolitan Region. Throughout the 1990s, Dublin experienced a major office development boom. The geography of office development changed during this period as the shortage of development sites available in prime locations induced a dramatic shift in search of alternative sites in suburban

[23] This is a conservative estimate. Section 5.7.1 of this report deals with employment forecasts for the county and outlines two possible growth scenarios based on forecasts of population growth over the period 2002–2010 and changes in the labour force participation rate. Refer to table 5.10, p.78 of this report.

[24] Incubation space for start-up companies is provided in a number of local enterprise centres in the county as well as at the Institutute of Technology, Tallaght. Refer to Section 5.8.10 of this report.

locations. In the second half of the 1990s, the full force of development activity became focused strongly on Dublin's southern and western suburbs. To some extent, the changing locational pattern of office development was a consequence of spatially-based tax incentives which stimulated some office development outside the office core (e.g. in Tallaght Town Centre and at Nangor Road), however the shift to the suburbs was stimulated primarily by market-led trends, including the increased demand for office development sites and the availability of lower rents in more peripheral locations.[25] The rate of development of office-based lands in South Dublin County more than doubled during the period 1990–2001.[26]

1.4.3 Residential Zoning

The rate of development of residential lands in the county also increased considerably during this period. The annual number of house completions grew from 1,681 in 1994 to 3,355 in 2001. However, despite the considerable growth in housing construction development in recent years, housing completions in the county still do not meet housing needs. While the population of the county increased by 9.2% to 238,835 in 2002, the number of households in the county increased by 19% over the same period. This trend reflects a significant reduction in the average family size. The average household size in 2002 was 3.2, a reduction on the figure of 3.54 in 1996. The projected average household size for 2011 is lower again – at 2.69.[27]

[25] Refer to MacLaran and O'Connell (2001), "The changing geography of office development in Dublin", in Drudy and MacLaran (2001), *Economic and Social Trends, Volume 3*, Trinity College Dublin.

[26] As noted by MacLaran and O'Connell (2001). The 2001 industrial zoned land survey recorded an increase of 1,123,257 square metres of floorspace over the period 1995-2001, a 68% increase on the 1995 figure, reflecting a significant scale of development over the six year period.

[27] Refer to the South Dublin County Council Development Plan 2004-2010, p.12.

It is estimated that approximately 18,980 dwellings will be required over the period period 2005 - 2010.[28] To ensure an adequate supply of land for residential development, additional lands (685 hectares) have been zoned for housing. The capacity of existing zoned lands for housing is more than adequate to satisfy the overall housing requirements of the county – there is an excess of 137 hectares over the minimum requirement of 400 hectares of land.

1.5 Demography

1.5.1 Population Change and Density in the Dublin Metropolitan Region

The population of the county in 2002 was 238,835. This represents 6.1% of the total national population of 3.92 million. Table 1.1 provides a breakdown of the population in the different local authority areas within the Dublin region. It also provides figures for the Irish Economy as a whole. The population of the Dublin Metropolitan Region in 2002 was 1,122,821, which means that Dublin accounted for more than one quarter (29%) of the total national population. South Dublin County accounted for 21% of the total population in the Greater Dublin Area.

Table 1.1 Population Change and Density in the Dublin Metropolitan Region

Geographic Area	Persons 1996	Persons 2002	Percentage Change in population 1996-2002	Area (hectares)	Density
Dublin City North	287,216	290,521	1.2	7,474	38.9
Dublin City South	194,638	205,260	5.5	4,287	47.9
Dún Laoghaire-Rathdown	189,999	191,792	0.9	12,695	15.1
Fingal	167,683	196,413	17.1	45,309	4.3
South Dublin	218,728	238,835	9.2	22,301	10.7
Dublin Metropolitan Region	1,058,264	1,122,821	6.1	92,066	12.2
State	3,626,087	3,917,203	8.0	7,018,224	0.6

Source: Derived from 2002 and 1996 Census

[28] Refer to the South Dublin County Council Development Plan 2004-2010, p.12.

Table 1.1 shows that, after Fingal, South Dublin County records the second highest rate of population growth over the 1996-2002 period. The population of South Dublin County grew by 9.2% over the 1996-2002 period; Fingal's population grew by 17.1%. Compared to Dublin City North and Dublin City South, population density in South Dublin County is quite low - at 10.7 per hectare it is the second lowest in the Dublin region. Fingal records the lowest population density but Fingal is by far the largest local authority area in Dublin, occupying 49.2% of the total land area.

1.5.2 Population Change and Density in South Dublin County

Table 1.2 below focuses on population changes within South Dublin County. Using the small area population statistics (SAPS) data, it provides a breakdown of the population based on the different electoral areas. The 49 electoral divisions (EDs) are grouped into nine main category areas: Clondalkin, Firhouse, Lucan, Rathfarnham, Tallaght, Palmerstown, Templeogue, Terenure and 'other'. The 'other' category includes the semi-rural EDs of Ballinascorney, Ballyboden, Bohernabreena, Saggart, Newcastle, Rathcoole and Edmonstown, which together account for just 9.58% of the total population of the county. Three areas (Tallaght, Clondalkin and Lucan) account for 58.4% of the total population of the county.

Table 1.2 Population Change and Density in South Dublin County

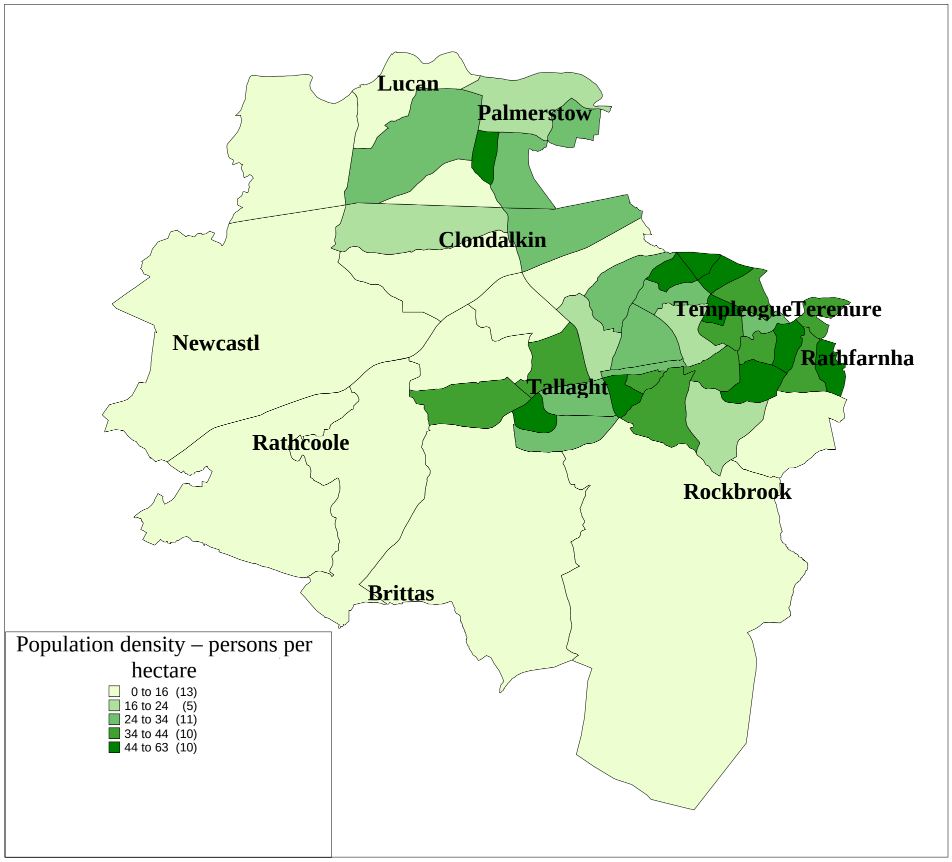
Geographic Area	Persons 1996	Persons 2002	% Population of South Dublin	% Change in population 1996-2002	Area (hectares)	Density
Clondalkin	41,617	43,038	18.02%	3.4%	2274	18.9
Firhouse	16,091	19,949	8.35%	24.0%	623	32.0
Lucan	20,183	33,571	14.06%	66.3%	2015	16.7
Palmerstown	12,410	12,059	5.05%	-2.8%	514	23.5
Rathfarnham	17,760	17,717	7.42%	-0.2%	402	44.1
Tallaght	62,290	62,931	26.35%	1.0%	2348	26.8
Templeogue	18,662	18,383	7.70%	-1.5%	534	34.4
Terenure	6,826	6,088	2.55%	-10.8%	129	47.2
Other	20,548	22,871	9.58%	11%	13418	1.7
South Dublin County	218,728	238,835	100.00%	9.2%	22,301	10.7

Source: Derived from 2002 and 1996 Census

Lucan records the highest percentage growth in the population over the 1996-2002 period (66.3%). Significantly, Tallaght and Clondalkin record very low levels of population growth over the 1996-2002 period. The population of Tallaght increased by just 1%, while the population of Clondalkin increased by 3.4%, a small figure by comparison with other areas.[29] Although Tallaght and Clondalkin account for 44% of the total population of the county, population density levels within these areas are relatively low compared to the other electoral divisions. The areas with the highest levels of population density are Terenure (47.2), Rathfarnham (44.1) and Templeogue (34.4). Table 1.2 shows a significant increase in population density in Firhouse (32). This area, which is located close to Tallaght, records the second highest rate of population growth in the county.

[29] Within the Tallaght and Clondalkin areas, some EDs (e.g. Jobstown and Killinarden in Tallaght, and Rowlagh in Clondalkin) recorded higher population growth than others. For a more in-depth analysis, 0 provides a breakdown of population changes at ED level.

Figure 1.2 Population Density by Electoral Division



Source: Derived from 2002 Census

The population of the older and more affluent areas of the county (Terenure, Templeogue and Rathfarnham) declined over the 1996-2002 period. This reflects the ageing population in these areas. As table 1.4 (p.18) shows, these three areas have the highest percentage of the population aged over 65 years and the highest elderly dependency ratios in the county.

1.5.3 Changing Growth Patterns: Counter-Urbanisation Trends

Much of the area of the county was developed in the relatively recent past, with most of the growth in Tallaght and Clondalkin taking place during the 1970s and 1980s. In the 1990s, Lucan and Firhouse became the two main centres of population growth. Within the Lucan area, the population of the Lucan-Esker electoral division increased almost threefold over the period 1996 – 2002. The population grew from 7,451 in 1996, to 20,807 in 2002. This was the largest population increase (at ED level) in the State during this period. It is interesting to note that over the same period, 1996-2002, the population of the semi-rural areas of the county (the EDs of Ballinascorney, Ballyboden, Bohernabreena, Saggart, Newcastle, Rathcoole and Edmondstown which comprise the 'other' category) increased by 9.2%.[30] This growth reflects the expansion of the population beyond the existing suburbs into the rural parts of the county.

The new patterns of suburban growth in recent years reflect an emerging counter-urbanisation trend. Counter-urbanisation is the movement of people out of cities to the surrounding areas. With the current upward pressure on house prices and the price of building land close to the city, residential development is being forced into what would once have been considered rural areas. The continuing spread of development is pushing the boundary of the built-up area further out and diffusing the distinction between urban and rural areas.[31]

By 2011 the population of the county is expected to exceed 265,000. The majority of this future population growth is expected to be located in Tallaght West, Clondalkin and South Lucan, and in particular Adamstown (the fastest growing area in the county),

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[30] Within this category, four areas – Ballinascorney, Bohernabreena, Edmondstown and Saggart - accounted for most of this growth. Refer to Appendix B on the breakdown of population statistics.

[31] There are four main reasons for counter-urbanisation. First, counter-urbanisation is facilitated by the increase in car ownership, which means that people are more mobile. This has led to an increase in commuting. Secondly, information technology also allows more people to work from home. Thirdly, new business parks on the edge of cities (such as Grange Castle and Citywest in South Dublin County) mean that people no longer have to travel to the city centre; they can live on the outskirts of the city to be near where they work. Fourthly, urban areas are becoming increasingly unpleasant places to live due to pollution and traffic congestion; this contributes to the movement of people to the suburbs. It is also becoming more commonplace for people to move away from urban locations when they retire.

which is located south west of Lucan. The more rural areas of Newcastle, Saggart and Rathcoole are also likely to experience growth.

1.5.4 The Age Structure of the Population: A Comparison with the Dublin Region

Table 1.3 provides a breakdown of the age structure of the population in South Dublin County and enables comparison with the other local authorities in Dublin. The youthful structure of the population is an important demographic feature. As can be seen from Table 1.3, 41% of the population in South Dublin County is aged less than 25 years compared with 36.9% for the whole of the Dublin area. In 2002, 6.26% of the population in South Dublin County was over the age of 65, compared with 10.15% for the Dublin Metropolitan Region and 11.13% for the state. The youth dependency ratio of South Dublin County and Fingal are almost identical. These two local authority areas have the youngest populations within Dublin.

Table 1.3 County and City Age Profile and Dependency Ratios, 2002

Age	South Dublin	Dublin City North	Dublin City South	Dún Laoghaire-Rathdown	Fingal	Dublin Metropolitan Region
aged < 15	22.47	17.69	14.03	19.17	22.70	19.17
aged < 15 – 24	18.53	17.69	18.40	16.59	17.34	17.75
aged < 25 – 44	32.16	32.15	36.33	29.18	33.80	32.70
aged < 45 – 64	20.58	19.83	18.20	22.65	20.22	20.24
aged > 65	6.26	12.64	13.05	12.42	5.94	10.15
Youth Dependency	31.53	25.38	19.24	28.01	31.82	27.11
Elderly Dependency	8.79	18.14	17.90	18.16	8.33	14.36

Source: 2002 Census

Table 1.4 provides a breakdown, again using SAPS data, of the age structure of the population in the different electoral divisions in South Dublin County. The age profile within the county is not uniform. As one might expect, the disparities in age structure reflect the relatively recent growth in population in certain areas within the county, and the decline in others. The older, more settled areas of Rathfarnham, Templeogue and

Terenure account for almost half (49.9%) of those aged over 65, compared with 14% for the areas of more recent population growth - Clondalkin, Firhouse, Lucan and Tallaght. This is reflected in the extremely high elderly dependency ratios in the older areas of the county and the very low ratios in the newer areas.

Table 1.4 District Age Profile and Dependency Ratios 2002

Age	Clondalkin	Firhouse	Lucan	Rathfarnham	Tallaght	Templeogue	Terenure
% aged < 15	24.69	25.56	22.99	18.08	24.26	15.87	13.46
% aged < 15 – 24	19.61	17.03	13.54	16.16	22.38	18.86	12.42
% aged < 25 – 44	32.80	35.33	45.91	27.62	28.01	26.14	26.77
% aged < 45 – 64	18.84	19.01	14.08	24.29	21.89	26.89	23.54
% aged > 65	4.06	3.07	3.48	13.85	3.47	12.24	23.81
Youth Dependency	34.65	35.81	31.27	26.57	33.56	22.07	21.45
Elderly Dependency	5.70	4.31	4.73	20.34	4.80	17.02	37.95

Source: Derived from 2002 Census

Lucan has the highest percentage of the population aged under 44. In 2002, more than four-fifths of the population of Lucan (82.44%) was under the age of 44. Using this indicator of the youthfulness of the population, Lucan is followed by Firhouse (77.92% aged <44), Clondalkin (77.1%) and Tallaght (74.65%). On average, the percentage of the population (in 2002) under the age of 44 in these four areas was 77.36%.

Part 2. South Dublin County: Socio-Economic Characteristics

2.1 Introduction

While South Dublin County has benefited greatly from the continued economic boom, some areas of the county remain disadvantaged. The main communities experiencing social exclusion are in North Clondalkin and South-West Clondalkin (the EDs of Moorfield, Rowlagh, Cappaghmore and Dunawley), as well as West Tallaght (including the EDs of Killinarden, Jobstown and Fettercairn).

2.2 Unemployment

One of the main indicators of social disadvantage is unemployment. Table 2.1 provides figures for unemployment in South Dublin County and enables comparison with the Dublin Metropolitan Region and the State. Unemployment in South Dublin County was 8.0% in 2002, compared to 8.5% in the Dublin Metropolitan Region and 8.8% in the State as a whole.

Table 2.1 Unemployment in the Dublin Metropolitan Region

Geographic Area	Unemployment Rate 2002	Unemployment Rate 1996	Change 1996 – 2002
State	8.8%	14.8%	5.9%
Dublin Metropolitan Area	8.5%	15.5%	7.0%
South Dublin County	8.0%	14.9%	6.9%

Source: 2002 and 1996 Census

The rate of unemployment in the county fell by 6.9% between 1996 and 2002 (from 14.9% to 8.0%). The reduction in the level of unemployment over this period reflects the growth in the economy beginning in the 1990s, which resulted in increased job creation and lower unemployment levels throughout the State.

2.1.1 Unemployment in South Dublin County by Electoral Division

Table 2.2 provides a breakdown, using SAPS data, of the distribution of unemployment by geographical area. Unemployment is not distributed evenly throughout the county. The highest rates of unemployment are in Tallaght (11.7%), Clondalkin (10.5%) and Palmerstown (9.5%).

Table 2.2 Unemployment in South Dublin County

Geographic Area	Unemployment Rate 2002	Unemployment Rate 1996	Change 1996 – 2002
Clondalkin	10.5%	20.5%	10.0%
Firhouse	4.8%	5.9%	1.2%
Lucan	4.9%	8.1%	3.2%
Palmerstown	9.5%	16.8%	7.3%
Rathfarnham	4.5%	6.6%	2.1%
Tallaght	11.7%	22.4%	10.7%
Templeogue	4.1%	7.1%	3.0%
Terenure	6.0%	9.7%	3.7%
Other	6.3%	12.1%	5.8%

Source: Derived from 2002 and 1996 Census

Between 1996 and 2002, there was a significant reduction in the level of unemployment in these three areas. The rate of unemployment almost halved in Clondalkin and Tallaght, while in Palmerstown, the rate of unemployment decreased from 16.8% to 7.3%.[32] The lowest rates of unemployment were recorded in the areas of Templeogue, Rathfarnham and Terenure.

Unemployment in Clondalkin is concentrated in the districts of Cappaghmore (14.4%), Dunawley (12.9%), Moorfield (12.3%) and Rowlagh (19%) although table 2.3 shows that

[32] The Palmerstown area comprises Palmerston Village, which had an unemployment rate of 5.3%, and Palmerston West which had a much higher unemployment rate of 11.6%.

between 1996 and 2002, unemployment in these districts fell by 44%.[33] Unemployment in the rest of Clondalkin was below the average for the county.

Table 2.3 Unemployment by ED in Clondalkin

Electoral Divisions (ED)	Unemployment Rate 2002	Unemployment Rate 1996	Change 1996 - 2002
Clondalkin-Ballymount	5.7%	11.6%	5.9%
Clondalkin-Cappaghmore	14.4%	25.3%	10.9%
Clondalkin-Dunawley	12.9%	26.3%	13.4%
Clondalkin-Monastery	6.8%	11.4%	4.6%
Clondalkin-Moorfield	12.3%	28.9%	16.6%
Clondalkin-Rowlagh	19.0%	36.8%	17.8%
Clondalkin Village	7.2%	10.5%	3.3%

Source: Derived from 2002 and 1996 Census

In Tallaght (table 2.4 below), low rates of unemployment were found in Belgard, Kilnamanagh, Kingswood, Millbrook and Oldbawn. In Glenview, Springfield and Tymon slightly higher rates of between 10.3 and 11.4 per cent were observed, while Avonbeg, Kiltipper, and Jobstown had rates of unemployment close to 14%. The highest rates of unemployment were in Fettercairn (19%) and Killinarden (22.4%). Unemployment fell considerably in all of the EDs in Tallaght between 1996 and 2002, with the most significant decreases in the EDs of Jobstown and Fettercairn.

[33] This figure was arrived at by combining unemployment figures for all four EDs in 1996 and 2002 and calculating the percentage change.

Table 2.4 Unemployment by ED in Tallaght

Electoral Divisions (EDs)	Unemployment Rate 2002	Unemployment Rate 1996	Change 1996 – 2002
Tallaght-Avonbeg	14.0%	28.1%	14.2%
Tallaght-Belgard	5.8%	9.0%	3.2%
Tallaght-Fettercairn	19.0%	47.9%	28.9%
Tallaght-Glenview	10.3%	17.2%	6.8%
Tallaght-Jobstown	14.5%	36.0%	21.4%
Tallaght-Killinardan	22.4%	43.5%	21.1%
Tallaght-Kilnamanagh	5.5%	11.6%	6.1%
Tallaght-Kiltipper	13.5%	25.2%	11.7%
Tallaght-Kingswood	5.5%	11.8%	6.3%
Tallaght-Millbrook	8.2%	14.5%	6.3%
Tallaght-Oldbawn	6.8%	11.7%	4.8%
Tallaght-Springfield	11.3%	18.1%	6.8%
Tallaght-Tymon	11.4%	19.1%	7.7%

Source: 2002 and 1996 Census

2.3 Urban Renewal Schemes

Unemployment is just one indicator of disadvantage. Levels of disadvantage are also related to the immediate living environment and social and environmental status of particular residential areas.[34] Socially disadvantaged communities tend to be concentrated within specific locations and this increases the difficulties of these communities. In South Dublin County, a number of Government schemes aimed at urban renewal and the re-development of disadvantaged areas have been initiated. These include tax incentives for the construction and refurbishment of residential, commercial and industrial buildings in specified areas and the development of local enterprise centres in disadvantaged areas.[35] The *Partnership Companies*, the *Integrated Area Plans (IAPs)* and the *RAPID* programmes, are among the main mechanisms designed to address the problems of social exclusion within these areas.

[34] Refer to section 4.3.1 and 4.4 on levels of education and the distribution of skills by electoral division.
[35] The role of local enterprise centres in combatting unemployment is dealt with in section 5.8 of this report.

The Partnership Companies were established in the 1990s with the aid of EU Structural Funds. Initially 12 Partership Companies were established throughout the State, and there are now 38 spread throughout the County. The Partnerships were established to alleviate problems of unemployment and social exclusion in seriously deprived areas (both urban and rural). In South Dublin County, three partnerships were established: Tallaght Partnership in 1991; Clondalkin Partnership in 1996, KWCD Partnership in 1994, and the Southside Partnership in 19??.[36] The Partnership Companies have played a vital role in fostering community development, through the implementation of a wide range of strategies in the areas of employment, enterprise development, education and training, the renovation of facilities and infrastructures, environmental improvement and community development. The over-arching aim of the partnerships is the elimination of social exclusion.[37]

The *RAPID Programmes* (Revitalising Areas by Planning, Investment and Development) were launched in 2001 under the Programme for Prosperity and Fairness (2000-2002).[38] Under this programme, the Irish Government renewed its committment to tackling the geographical concentration of poverty and social exclusion in particular urban and rural areas. Twenty-five disadvantaged urban communities were included in the first phase of RAPID, four of them in South Dublin County - one in North Clondalkin and three in West Tallaght (the neighbourhoods of Fettercairn/Brookfield, Killinarden and

[36] KWCD stands for Kimmage, Walkinstown, Crumlin and Drimnagh. It seeks to tackle unemployment and disadvantage in the Dublin 12 area. Other local development organisations that do similar work to the Partnerships include Lucan 2000 and Rural Dublin Leader. The role of these two organisations in enterprise development is outlined in section 5.8 of this report.

[37] Each Partnership produces a development plan for its area based on consultation with local communities and prioritising the specific needs of the locality. The plan must be targeted towards the most disadvantaged groups within the area i.e. the unemployed, travellers, single parents and the disabled.

[38]The *Programme for Prosperity and Fairness (PPF*) agreement between Government and the social partners, which covered the period 2000-2002, proposed that Local Authorities expand their role in tackling social exclusion. The most recent social partnership agreement is the *Sustaining Progress Agreement*, which covers the period 2003-2005.

Jobstown).[39] Two Rapid Plans of Action were drawn up: the West Tallaght Area RAPID Plan and the North Clondalkin RAPID Action Plan. The main objective of the RAPID programmes is to improve the quality of life of the residents of these communities by tackling poverty and social exclusion. RAPID is planned and implemented at local level by two *Area Implementation Teams* (AITs), consisting of representatives from the local community, state agencies, the Area Based Partnerships, and local Drugs Task Forces. These teams report to a County Monitoring Group.

The *Integrated Area Plans (IAPs)* are also focused on the Clondalkin and Tallaght areas and seek to address the physical, economic, social and environmental regeneration of Tallaght Town Centre and Clondalkin Town Centre, along with the disadvantaged West Tallaght and Clondalkin residential neighbourhoods. The Urban Renewal Act, 1998, established the guidelines governing the development of IAPs by local authorities. Subsection (4) states that "An integrated area plan shall consist of a written statement and a plan indicating the objectives for – (a) the social and economic renewal, on a sustainable basis, of the area to which the plan relates, and (b) improvements in the physical environment of that area". The IAPs address issues of physical development but also cover wider social issues.

2.4 Conclusion

While some areas of the county remain less well-off compared to others, from a historical perspective, the socio-economic landscape of the county has changed remarkably over

[39] The designation of the 25 areas was agreed by Government on the basis of clear and objective criteria, provided by the Trutz-Haase index, and on an independent analysis of deprivation, which used 11 broad variables drawn from the 1996 census of population and involved 75 separate items of data per electoral division. Factors such as unemployment, income levels, family and social structure, educational disadvantage and high levels of rented local authority housing, were taken into account by the Index. Based on information from the 2002 census, only one area, Killinarden, now qualifies as a seriously disadvantaged area.

the last decade.[40] Based on the Trutz Haase index of socio-economic disadvantage, only one area within the county (Killinarden) now qualifies as a seriously disadvantaged area, whereas in 1996 there were four. Recent improvements may be attributed to both market-induced and policy-induced factors. While the main driving force for change have been the increase in job availability in the county, which has greatly reduced unemployment within these areas, [41] policy-induced factors (and the interaction between institutional and market factors) have played a critical role.

Many of the positive changes (social, economic, infrastructural, and political) that have taken place over the last 10 to 15 years in the more disadvantaged areas of the county may be attributed to the diverse constellation and activities of Partnerships and other publicly-sponsored organisations involved in local development. From a community development perspective, the Partnerships have sought to motivate and empower communities to be the primary drivers of development within their localities. A key challenge now facing local government relates to the issue of how to organise, co-ordinate, integrate and establish priorities among the various local development initiatives so as to maximise their contribution to local development. In this regard, Social Inclusion Measures Group (SIM) is currently monitoring the allocation of funding and the effectiveness of existing programmes, with a view to informing policy-makers as to how to enhance the co-ordination of social inclusion activities in South Dublin County.[42] All of these programmes are funded under the National Development Plan (NDP), which is the largest and most ambitious investment plan ever drawn up for Ireland. It involves an investment of over €52 billion of public, private and EU funds over the period 2000-2006. The Plan involves significant investment in health services,

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[40] As compared to the picture presented, for example, in a seminal report by Drudy and Punch (1997). This report, *Toward s a Development Strategy for South Dublin,* provides a historical outline of the development of South Dublin County up to 1996 and an assessment of the social and economic structure and trends within the county.

[41] A detailed analysis of unemployment in these areas is presented in table 2.3 and table 2.4.

[42] The *Social Inclusion Measures Group* (SIM) is a subgroup of the County Development Board, responsible for co-ordinating all social inclusions activity in the County funded under the National Development Plan.

social housing, education, roads, public transport, rural development, industry, water and waste services, childcare and local development.

The promotion of education, social inclusion and culture, pertains to the whole of the county and not just certain areas. At the broader county level, South Dublin County Development Board's Strategy, *South Dublin: A Place for People*, is a ten year strategy for the social, economic and cultural development of South Dublin County over the period 2002-2012. The Strategy provides a template for the ongoing growth of the County in an integrated and inclusive manner.

Part 3. The Infrastructural Environment

3.1 Introduction

The cohesion, specificity and international character of a region can be seen in terms of the characteristics, opportunities, and constraints imposed by the existing infrastructure. Externally, a firm's infrastructural environment includes all aspects of the communication networks, including the telecommunications, transport and postal sub-systems. These impact on firms' internal technological capabilities by facilitating the diffusion of technology within national boundaries; improving access to technological information from abroad; lowering costs; increasing efficiency; opening up possibilities for networking (intra/inter-firm) and increasing the willingness of firms to form international linkages. All of these activities are central to economic performance. At the sectoral level, the infrastructural environment may be more important in some sectors than in others. The reliability and level of sophistication of the telecommunications system, for example, is critical to the development of the telecommunications sector. In practice, decisions with regard to the infrastructure can exert a critical influence on the evolution of an industry.[43]

The next section outlines the main characteristics of the economic infrastructure in South Dublin County. The two main components of the economic infrastructure are the transport and telecommunications infrastructures.

3.2 The Telecommunication Infrastructure

South Dublin County has significant international broadband telecommunications

[43] Smith (1997, p.94) for example, points out that the existence of a hydroelectric power infrastructure in Norway (and the pricing policies adopted for it) facilitated the development of an aluminium industry in Norway, and of a major metallurgical sector within the industrial structure of the country.

capacity.[44] High levels of capacity and carriers (such as Eircom, Esat BT, ESB Telecom, NTL, and Cable & Wireless) have resulted in strong competition and competitive prices.

3.2.1 The National Digital Park

The National Digital Park, which is located in the Citywest Business Campus, is the landing place for global crossings of fibre optic cable. It is the state's point of presence for transatlantic fibre, providing a direct fibre link to 24 cities in Europe, the US, South America and Asia Pacific. The National Digital Park, Figure 3.1, shows international broadband connectivity through the National Digital Park at Citywest.

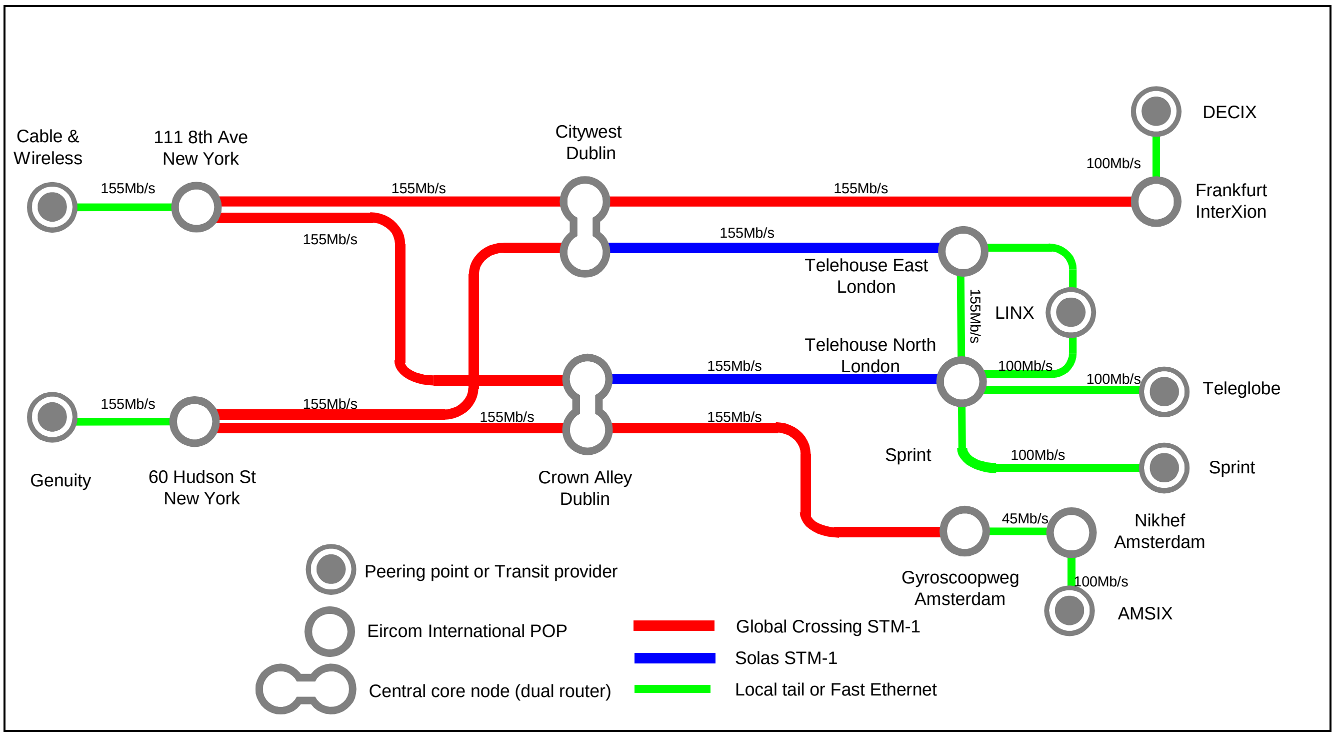
Figure 3.1 International Connectivity through the National Digital Park

Source: Eircom

[44] Broadband is a term used to describe a high capacity network (one that carries large amounts of data) that links together networks of lower capacity, usually local area networks.

A more detailed account of the International IP Network in terms of bandwidth capacity is provided below. Figure 3.2 shows the international internet protocol (IP) network connecting Ireland (from the two main exchanges at Citywest and Crown Alley) to nodes in New York, London, Amsterdam and Frankfurt. From these nodes on the network connections can be made through international carriers (Teleglobe, Sprint, Genuity, Cable & Wireless) to the rest of the world. The bandwidth of the IP network is indicated in the diagram in megabytes per second.

Figure 3.2 International IP Network



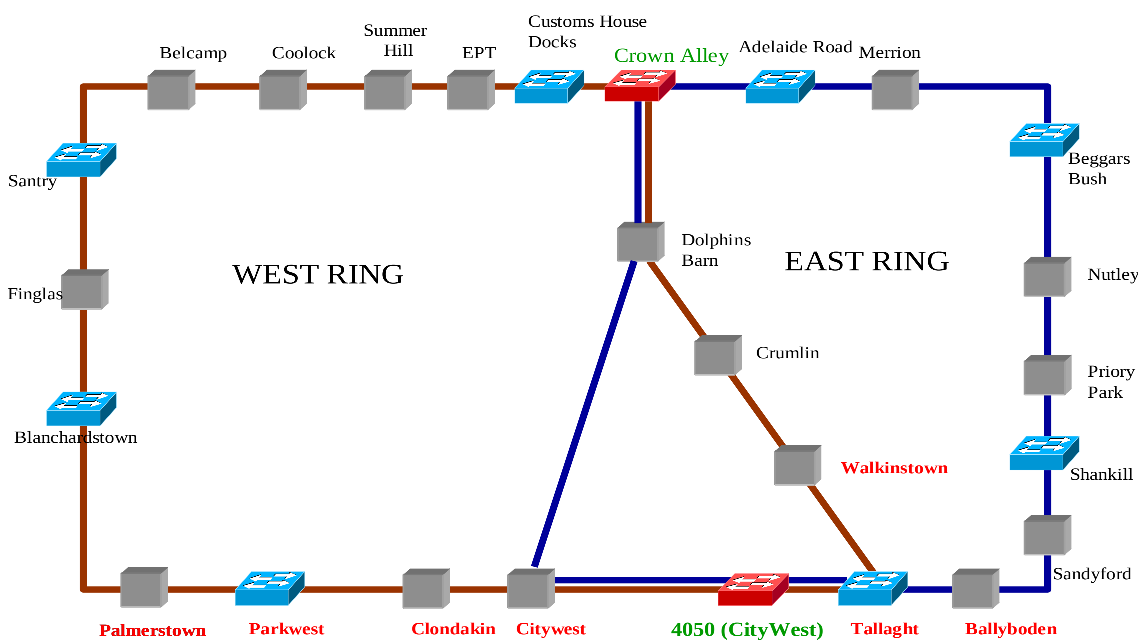
Source: Eircom

High quality broadband infrastructure requires reliable and resilient connections. Networks tend to be constructed in rings to ensure that data can travel in more than one direction, in case of breaks in the fibre links. The creation of such loops is an integral part of the Dublin Metropolitan Area Network (MANs).

3.2.2 The Eircom Dublin Metropolitan Area Network

Figure 3.3 below shows the various exchanges on the Eircom Dublin Metropolitan Area Network.[45] There are two main rings in Eircom's gigabyte network - the West Ring and the East Ring - with Crown Alley and Citywest (National Digital Park) linking these two. There are nine network exchanges (or equipment access modules) in South Dublin County: two at Citywest (National Digital Park) and one each at Palmerstown, Parkwest, Clondalkin, Tallaght, Ballyboden, and Walkinstown. The Crumlin exchange also serves some areas that fall within the boundary of South Dublin County.

Figure 3.3 Eircom Dublin Metropolitan Area Network



Source: Eircom

[45] Eircom is the largest provider of fibre-optic cable; the other two key providers are Esat BT and ESB Telecom. The ESB network is presented in Appendix D.

Broadband telecommunication is not just confined to fibre-optic cable; other mediums include radio, mobile and satellite. In South Dublin County, NTL has invested heavily in the provision of cable broadband access, with the company's most recent major investment being in the Lucan area. Currently three main technologies deliver broadband access: DSL (Digital Subscriber Line), cable modems and optical fibre. DSL internet access coverage is 98% in South Dublin County, compared to 72% in the state as a whole.[46]

At present, the deployment of broadband in Ireland is largely dependent on two technologies, DSL and optical fibre. However, while DSL is suitable for small businesses, for larger companies, especially companies requiring advanced communications capabilities and the public sector, optical fibre connections are necessary.

Fibre-optic cable provides the most future-proof medium for delivery of high-bandwidth services. The three major providers of backbone capacity on fibre infrastructure in Ireland are ESB Telecom, Eircom and Esat BT. The national backbone is delivered by the ESB and comprises 1,300 Km of fibre-optic cable. The ESB is also a carriers' carrier in that it provides a backbone system for other users. *Eircom* is the largest provider of fibre-optic cable in Ireland with 207,000 Km's in the economy. The company plans to roll-out broadband to every town in Ireland with a population greater than 1,500 by 2005. Esat BT focuses on larger companies and has 2,000 Km of fibre network around the country. Additional providers of fibre-optic cable networks include *Smart Telecom, Cable & Wireless, Bord Gáis Eireann* and *NTL*. At present, there is significant overcapacity of fibre-optic cable in the economy, especially in the Dublin region.[47]

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[46] Information provided by Peter Maxwell, Head of Telephony, Internet Platforms and Services, Eircom.
[47] Refer, for example, to the Joint Committee on Communications, Marine and Natural Resources, *Second Report*, *Provision of a national high speed broadband infrastructure*, March 2004. Chapter 11 deals with the provision of a national high speed broadband infrastructure in the Irish economy.

To promote competitiveness in the telecommunications sector, the Government and ComReg[48] have put pressure on telecommunications operators to provide DSL services at more competitive prices; they have also facilitated increased competition through deregulation of the Irish cable market. However, for larger companies, national leased line costs compare well with the rest of the OECD. Within the EU, Ireland ranks fourth in terms of competitiveness, with costs well below the EU average. Ireland also offers the lowest international leased line costs in the OECD. [49]

3.3 The Transport Infrastructure

The transportation strategy employed by South Dublin County Council has a dual base, infrastructural and service improvement together with travel demand management. Apart from the provision of roads infrastructure, the Council is responsible for the expansion of the public transport network, strategic road construction and traffic management. Demand management seeks to reduce the growth in the demand for travel while maintaining economic progress and encourages a transfer of trips to sustainable modes of transport.

The Dublin Transportation Office (DTO) is responsible for transport planning in the Dublin region and coordinates the implementation of an integrated transport strategy for the Greater Dublin Area. Since the establishment of the DTO in 1995, unprecedented levels of economic growth combined with rapidly increasing levels of car ownership have led to very large increases in the levels of traffic, resulting in much greater levels of congestion.

[48] ComReg is the statutory body charged with the licensing and regulation of the electronic communications industry in Ireland. The functions of ComReg in relation to regulation of the electronic communications industry and the postal sector is set out in the Communications Regulation Act 2002

[49] Refer to the *Broadband Telecommunications Benchmarking Study* (Forfas, 2004).

3.3.1 Bus and Rail Services

Table 3.1 shows the increase in the demand for travel in Dublin since 1991 and the projected increase to 2016.[50] It shows a 65% increase in peak hour travel for the nine years between 1991 and 1999 and a predicted increase of 72% for the sixteen year period from 1999 to 2016.

Table 3.1 Demand for Travel (thousand person trips)

Year	1991	1997	1999	2016
AM (peak hour)	172	250	283	488
Off peak hour	107	157	179	256

To meet the challenge of a rapidly increasing demand for travel within the region, significant investment has been made to improve the transport infrastructure. The improvements in the road network, the LUAS on-street light rail line, introduction of Quality Bus Corridors are some indicators of the progress made during the past decade. The Council supports the role of the bus as the key element in the public transport area in the short to medium term and is examining an increasing role in this area in particular the provision of bus based *Park & Ride* facilities. A Park & Ride facility exists at the Red Cow and an additional Park & Ride facility is under construction adjacent to the Luas terminal in Tallaght.

The LUAS light rail service, the second stage of which commenced operation in October 2004, has 23 stops along the "Red Line" route serving South Dublin County. The journey time from Tallaght to Connolly station by LUAS takes approximately 55 minutes.

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[50] Source: *A Platform for change, DTO Strategy 2000–2016,* p.6.

Two suburban train stations (Clondalkin and Hazelhatch) currently operate within the county, linking to Heuston Station and Kildare. An upgrade of this service (the *Kildare Route Project*) is planned with two additional lines and new stations intended for Adamstown, Kishoge and Fonthill Road.[51] With the expansion of the population into the outer suburbs, the number of bus routes serving the rural part of the county has increased. South Dublin County Council policy is to promote a frequent accessible reliable and safe local public transport system within rural areas.[52]

3.3.2 The Roads Network

The Dublin Metropolitan Area is the focus of rail and road routes nationally. The main road links are to the city centre, however the radial structure of Dublin's roads leads to traffic congestion during peak hour commuter traffic on main roads leading into the city centre. To alleviate traffic congestion problems, the M50 motorway was constructed (in 1992) as a ring road around the city. The M50 has since been extended and now forms an economic corridor that links South Dublin County with Dublin Airport, and population centres in Finglas, Ballymun and Swords, on the northside of the city, and Ballinteer, Dundrum and Sandyford on the Southside.

The road network within the South Dublin County area consists of 55 km of National Roads, 103 km of Regional Roads and 689 km of Local Roads. The national primary routes within the county connect southwest to Cork and Limerick (N7), to the west and Galway (N4), and the N81 links south to Wexford. The M50 motorway links the county to the South N11 and to the M1 Belfast.

There has been a significant increase in the volume of orbital traffic movements in recent years. Over the last five years, the volume of traffic increased by 23%, 11% and 22% on

[51] *A Platform for change, DTO Strategy 2000–2016*, p. 14.
[52] As outlined in the *County Development Plan 2004-2010*, p.79.

the N4, N7 and N81 respectively.[53] These figures indicate a rising trend in traffic in the county area though to a smaller extent along the N7, which may be partly due to the deterring and volume limiting factor of the Red Cow roundabout. The fastest growing travel destination in Dublin is Clondalkin-Tallaght, with an almost fourfold increase in morning peak hour car trips to this area between 1991 and 1997.[54]

The National Roads Authority and the Council are embarking on a major programme to upgrade the national and non-national road networks as part of the economic development of the county. The upgrade of the M50 and the Grange Castle Road (ORR)[55] are key elements of this programme. The non-national road schemes set out in the County Development Plan are proposed to be implemented over a six year period as part of this programme.

South Dublin County Council has also commenced an extensive investment in the Traffic Management Area with the provision of a Traffic Management Centre which employs the latest computer-based traffic management systems in conjunction with CCTV and remote traffic counting. This will improve local mobility by maximising use of road space and prioritising public transport.

3.4 Dublin Port

There are 12 major ports in Ireland and Dublin port is the largest. Dublin port is located within 17.6 kilometres travelling distance of Tallaght, the County town.. The port has undergone major rationalisation during the past decade and is now a modern and cost efficient port. Ro/Ro and Lo/Lo traffic accounts for over 75% of total throughput although Dublin is also an important passenger port. Recent infrastructural investments include the development of a new 180 metres long berth for Lo/Lo ships. The port is also

[53] Source: Timothy Mullen, Roads Department, South Dublin County Council.
[54] *A Platform for change, DTO Strategy 2000 – 2016*.
[55] Outer Ring Road.

completing the linkage between its new Vessel Traffic Information System and the internet so that customers will be able to book and track port services online. Another major investment, the Dublin port tunnel is due to be completed in 2005 and this will greatly improve access to the port.

3.5 Dublin Airport and Baldonnel

Dublin international airport is located in Fingal County approximately 10 kilometres North of Dublin city centre and 25 kilometres from Tallaght. It is located between the M50 Motorway and the town of Swords, which lies 2 kilometres to the north of the airport. A Metro link between the Airport complex, Dublin City centre, Tallaght and Clondalkin is planned as part of the DTO Strategy for 2000–2016.

The Airport plays a vital role as a point of access for tourism, business and freight traffic. Over 56% of all passengers originate from the Dublin Area. Passenger traffic entering through Dublin Airport has increased from 5 million in 1993 to almost 15.9m in 2003. In 2001, the airport ranked 20th in Europe with 185,000 movements and 140,000 tons (mail and freight).[56] Passenger traffic at Dublin Airport is almost all origin and destination with transfers accounting for only one per cent. Twenty-five per cent of passengers fly for business purposes.[57]

By 2020, it is expected that traffic at Dublin airport will double its current level to reach almost 31 million passengers. To facilitate this expansion, additional terminal and pier facilities are planned within five years, and a second parallel runway before 2010.[58]

Casement Aerodrome, Baldonnell is located 5km west of Tallaght Town Centre, close to Citywest, Greenogue and Grange Castle business parks. It is the sole military airport in

[56] *BOB Airport Accessibility Pilot Final Report* (2003).
[57] *Aer Rianta Passenger Survey August 2001*.
[58] *Aer Rianta Presentation to the Joint Committee on Transport* (2003).

the State and serves as the main centre of Air Corps operations. The County Council, in conjunction with the CDB, the State authorities and other agencies, will examine the potential of the aerodrome to contribute to the future economic development of the County by developing it for joint military/civilian use. The *County Development Plan* states that "It is an objective of the Council that Casement Aerodrome shall retain its current status in the Development Plan for 2004-2010 while accepting the need to investigate the future of the airport".[59]

3.6 Energy

The supply of energy in Ireland is regulated by the Commission for Energy Regulation (CER). The Commission is responsible for the regulation of the electricity and gas markets and seeks to promote competition in the generation and supply of electricity and the supply of natural gas.

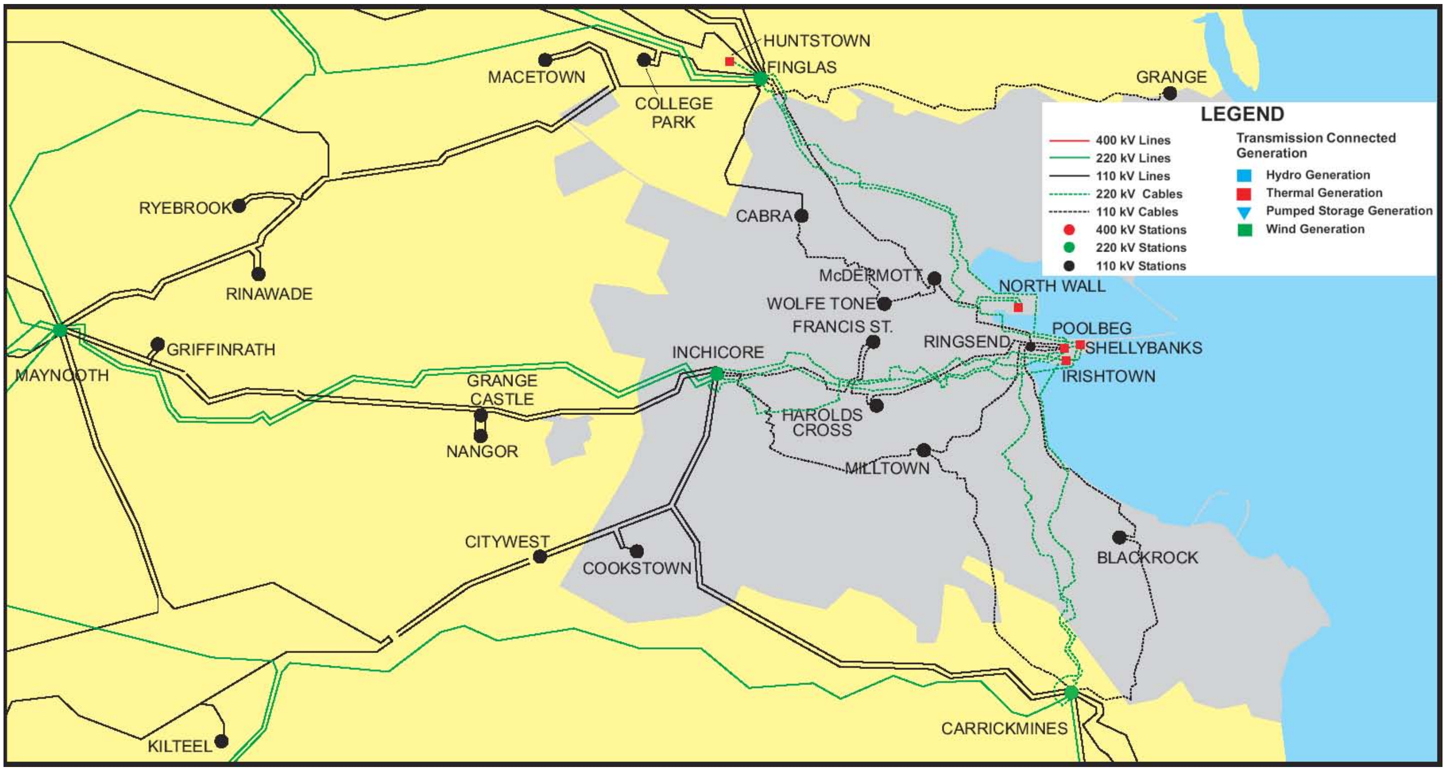
3.6.1 Electricity Distribution and Transmission

Ireland has one of the fastest growing electricity markets in the developed world. The market grew by 40% between 1992 and 2002, far in excess of growth in the rest of Europe. Since February 2004, 56% of the market has been opened to competition. The market will be fully opened to competition in 2005.

ESB Networks is the owner and operator of the electricity network in the Republic of Ireland. It is responsible for maintaining electricity transmission network infrastructure in the country. The National Grid is the electricity transmission network operating power lines ranging in voltage from 110KV to 400KV. The National Grid was originally established at 110KV. As demand increased, the higher capacity 220KV and then 400KV lines were introduced. There are over 5,800 km of transmission lines in Ireland and the electricity network is currently undergoing a major €3 billion refurbishment programme. A map of the network in the South Dublin County is shown in Figure 3.4.

[59] Refer to p.26 section of the *South Dublin County Development Plan (2004-2010)*.

Figure 3.4 Electricity National Grid in South Dublin County



Source: ESB

Electricity generated at power stations is transformed into higher voltages of 110KV, 220KV and 400KV and is then fed into the transmission network. The network contains over one hundred high voltage transformer stations where the voltage is altered to 38KV, 20KV and 10KV. Larger industrial premises may be connected directly at these voltages. Electricity is transformed down to mains normal voltage level for use by customers, at local substations.

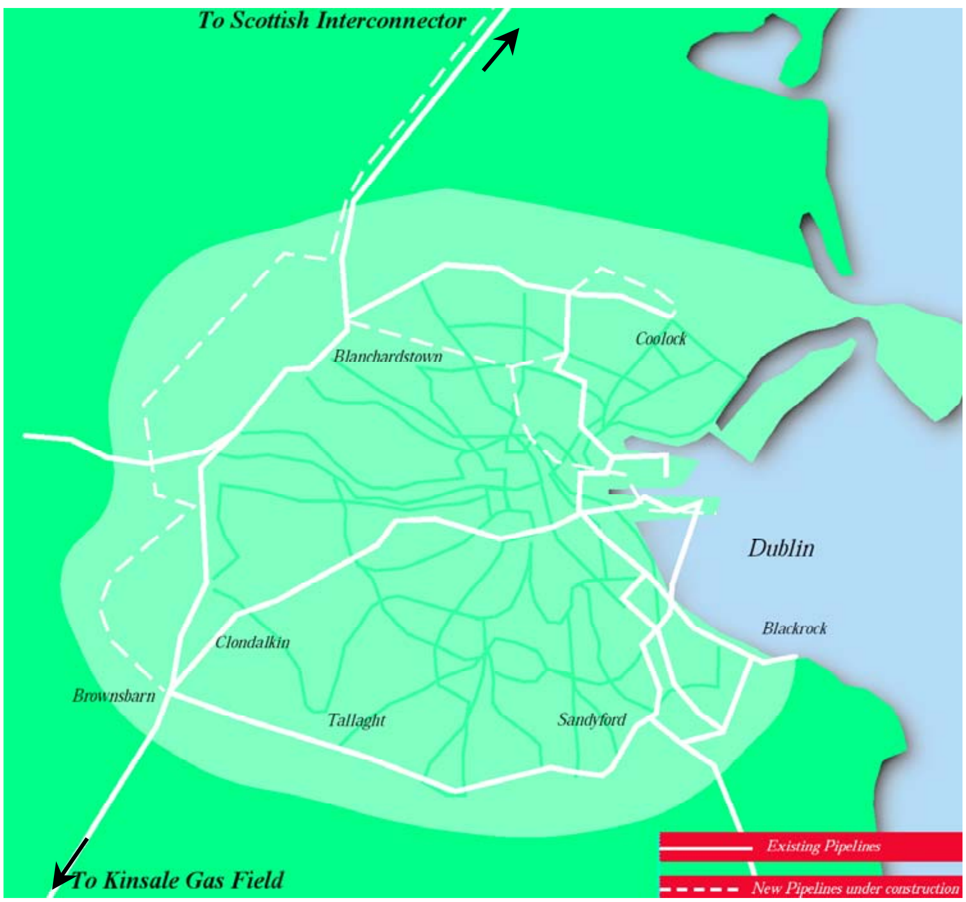
3.6.2 Natural Gas

Ireland is the fifth most open market in the European Union for gas. Eighty-five per cent of the market by volume is open to competition. The market is scheduled to be fully liberalised in 2005. The Dublin region accounts for almost half the demand for gas in

Ireland. The increase in demand for natural gas in Ireland has been driven by deregulation of the market and economic growth.

Bord Gáis is the owner and operator of the distribution and transmission gas network in Ireland. The gas transmission network in Ireland consists of 3,000km of high pressure steel pipes. Figure 3.5 shows the gas high pressure transmission pipeline network serving the South Dublin County area. Connection points from the high pressure transmission network facilitate the supply of gas to the main population centres along the routes of the pipelines. Low pressure distribution pipelines feed off these connection points from the feeder main into various towns. There are 8,400km of distribution pipelines in Ireland.

Figure 3.5 Dublin Area Gas Pipeline Network



Source: Bord Gáis

Major infrastructure developments were recently added to the network as part of a €1.4 billion infrastructural programme that is being implemented by Bord Gáis to secure gas supplies to Ireland for the next 25 years. During 2003, €171 million was invested in expanding the existing transmission and distribution network.

Recent additions to the network include a second sub-sea interconnector to Scotland and a cross country pipeline from Dublin to Limerick via Galway. The new interconnector will be used by Bord Gáis and major users to ship natural gas purchased at market prices in the UK to Ireland. The interconnectors guarantee security of supply, ensuring a reliable energy supply to meet Ireland's energy needs in future decades.

3.7 Water Supply and Drainage

South Dublin County Council is not a water producer in that it does not abstract or treat water for supply. However, the Council manages its own water storage reservoirs at Belgard and Ballyboden which feed into the County's water distribution pipe network of which there is a total of 1,363 Kilometres of watermain. The treated water supply source for South County Dublin is the Dublin City Council run treatment plant which is located at Ballymore Eustace.

There are two main schemes currently underway to improve the quality of supply in the county:

- The Lucan/Palmerstown Water Supply Scheme which is scheduled to be commissioned in the Autumn of 2004 will serve the northern sectors of the County and

- The Boherboy Water Supply Scheme, which is at planning stage and will serve the south and south eastern parts of the County.[60]

The drainage network in South Dublin can be divided into two main catchment areas, the area draining into the Grand Canal Drainage System, and the Dodder Valley Sewer. There are a total of 595 kilometres of foul sewer and 575 kilometres of surface water sewer in the county. Waste water is conveyed, in advance of eventual discharge, via the main drainage collection system to the Ringsend Treatment Works. The provision of additional pipelines and retention tanks to cater for highflow conditions is planned for these areas.

3.8 Waste Management and Environmental Protection

In 2003, almost half of South Dublin County Council's annual budget (45.3%) was spent on two areas: (i) water supply and sewerage and (ii) environmental protection (including waste management). Approximately 75,000 to 80,000 tonnes of domestic waste are collected each year within the county. In 2004, the Council's Environment Department introduced a pay by volume/tagging system for bin collections to encourage households to recycle more and put their bins out less frequently. Recycling is facilitated through the provision of green bins for paper, light cardboard, tetra packs and tin and aluminium cans. In addition, the Council operates 50 'Bring Centres' where glass and plastic bottles and textiles can be disposed of. More bulky items can be disposed of at the civic amenity bailing centre at Ballymount, Ballymount Industrial Estate, for a fee.

The Council monitors the freshwater streams and rivers of the county. One hundred and thirty-five trade and effluent licences are currently in operation under the Local

[60] Information on the Boherboy and Lucan/Palmerstown projects as well as other investment projects is available on the South Dublin County Council website, under environmental services information.

Government (Water Pollution) Act. The Council has recently appointed an Environment Education Officer to promote greater environmental awareness within the county, through encouraging better management of household waste, litter prevention and water protection.[61]

[61] The achievements of South Dublin County Council, together with Fingal, Dun Laoghaire-Rathdown and Dublin City Council, are outlined in the *Draft Dublin Waste Management Plan 2005-2010.*

Part 4. Characteristics of the Local Labour Market

4.1 Introduction

Section 1.5 of this report dealt with demographic changes within South Dublin County.[62] Because most of the county was developed ab initio and over a short period of time, it has a more uniform demographic structure compared to more mature parts of the city and county which have developed over a much longer period. This means that shifts from one phase of the life cycle to another, for example, from school to employment, tend to be more marked in these areas.[63] This has important implications for the education system and for the labour market; as the size of the labour force increases, the number of jobs available must also increase in order to absorb the increase in the labour market.

4.2 Growth in the Labour Force and Participation Ratios

In 2002 the labour force in South Dublin County consisted of 119,632 persons. There were 110,101 employed, representing 92% of the labour force, and unemployment stood at 9,531 (8% of the labour force). Over the period 1996 to 2002, the rate of unemployment in the county decreased from 14.9% to 8%. This significant reduction in the level of unemployment was achieved despite the considerable expansion in the size of the labour force. The size of the labour force increased by 23% over the period, from 97,455 in 1996 to 119,632 in 2002.

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[62] Refer to table 1.1, table 1.2 and table 1.3 (pp. 12, 14, and 17) on key demographic trends within the county.

[63] Refer also to Walsh et al, 2001. *Working Paper Series No. 14, South Dublin County Profile*.

Table 4.1 Labour Force and Employment

Geographic Area	Dublin Metropolitan Area 2002	South Dublin 1996	South Dublin 2002	Change 1996 – 2002
Employment	508,030	82,978	110,101	+33%
Labour force	555,306	97,455	119,632	+23%
Rate of unemployment	8.5%	14.9%	8.0%	-6.9%

Source: 2002 and 1996 Census

Although most of the increase in the labour force can be accounted for by demographic developments, the size of the labour force is also influenced by participation rates. The labour force participation rate measures the ratio between the population aged 15 years and over and the portion of the population that is in the labour force.

Table 4.2 Labour Force Participation Rates, 2002

Geographic Area	Persons	Male	Female
State	58.3	69.9	47.0
Dublin Metropolitan Area	61.2	71.5	51.8
Dublin City	60.2	69.4	52.0
Dún Laoghaire-Rathdown	56.0	67.7	45.9
Fingal	64.8	75.7	54.4
South Dublin 2002	64.6	75.6	54.3
South Dublin 1996	61.1	76.4	46.9
Change from 1996 – 2002	*+3.5*	*-0.8*	*+7.4*

Source: 2002 and 1996 Census

Table 4.2 provides a breakdown of labour force participation rates for the Dublin Metropolitan Area. The labour force participation rate in South Dublin County is 3.4% higher than the average for the Dublin Metropolitan Area. This is partly due to the fact that South Dublin County has the second highest female labour force participation rate[64] in the Dublin Metropolitan Area. (The female participation rate in South Dublin Conunty is 54.3% just slightly below the Fingal rate of 54.4%). Between 1996 and 2002 the labour force participation rate in South Dublin County increased by 3.5%. The female participation rate increased by over seven percentage points during this period, from

[64] The participation rate in Fingal County is marginally higher.

46.9% in 1996 to 54.3% in 2002. The female participation rate is expected to increase further over the next decade and to be the main contributing factor to the increase in the labour force. Both the size of the labour force and the participation rate in South Dublin County increased over the 1996-2002 period.

4.2.1 Immigration

Immigration has been a significant contributing factor to the growth of the labour force since the mid 1990s. In 2003, the CSO estimates that there were 50,500 immigrants to the State.[65] The majority of the recent immigration has been to the Greater Dublin Area. The largest group of immigrants are:

- returning Irish migrants – this group constituted 34.7% of immigrants in 2003
- the second biggest group are from the countries of the EU; this group accounted for 27.3% of immigrants
- the rest of the world provided 38.2% of immigrants; these are sub-divided into migrant workers and asylum seekers

The first two groups do not require work permits to obtain employment in Ireland and tend to integrate more easily into Irish society; the third group comprises asylum seekers and migrant workers.

4.2.2 Asylum Seekers

Asylum seekers do not have the right to work. If their application for refugee status is approved, they can enter the labour market and acquire the same employment rights as Irish workers; they can also participate in FÁS, VTOS and PLC courses. Only 345

[65] Source: *Population and Migration Estimates*, CSO, December 2003. To put these figures in perspective, the USA (which has a population of 290.8 million) accepts an annual intake of approximately 700,000 legal migrants. The figure for Ireland of 50,500 immigrants, with a population 3.98 million, is equivalent to the USA receiving over 3.6 million immigrants.

(6.6%) applications for refugee status were granted in 2003.[66] Until the decision is made whether they qualify for refugee status under the 1951 UN Refugee Convention, they are dispersed in direct provision accommodation throughout the country and receive a supplementary welfare provision.

4.2.3 Migrant workers

The work permit system enables employers with vacancies that they cannot fill with citizens from Ireland or from within the European Economic Area (EEA)[67] to recruit employees from countries outside the EEA. Work permits are tied to the employer and have to be reapplied for when an employee changes employer.

Unlike work permits, work visas are tied to a particular sector rather than a specific employer.[68] The work visa system exists to facilitate the recruitment of suitably qualified people for designated sectors where skills shortages are deemed acute (at present, medical, health, social care, information technology and construction professionals).

In 2003, a total of 47,551 work permits,[69] 1,158 work visas and 4,400 one-year working holiday visas were issued.[70] Of the total of 47,551 work permits issued in 2003, 16,367 (34.4%) were to companies based in Dublin. Forty-two per cent of all new work permits issued (as opposed to renewal of existing permits), were to businesses in Dublin.

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[66] In 2003, 7,900 applications for asylum were made. Of the 5,223 cases finalised during the year, only 6.6% acquired refugee status. This was lower than the figure of 10% in the previous year. Source: *2003 Annual Statistics*, Office of the Refugee Applications Commissioner.

[67] The European Economic Area (EEA) came into being on 1st January, 1994, following an agreement between the European Free Trade Association (EFTA) and the European Union (EU). It was designed to allow EFTA countries to participate in the European Single Market without having to join the EU. Current members are the EU states plus Norway, Iceland and Liechtenstein.

[68] The work visa system was introduced in 2000.

[69] Almost half of these were for the renewal of existing permits issued in previous years. Figures were obtained from the Department of Enterprise Trade and Employment website, http://www.entemp.ie/labour/workpermits/statistics.htm.

[70] Figures supplied by Visa Section, Department of Foreign Affairs.

4.3 A Skills Profile of the Labour Market in the Dublin Metropolitan Region

South Dublin County has a varied labour force in terms of levels of education and skills of the workforce. Table 4.3 provides a breakdown of the labour force by occupational grouping.

Table 4.3 Dublin Metropolitan Area: Percentage distribution of persons aged 15 years and over, classified by occupational grouping, 2002

Geographic Area	1 Professional workers	2 Managerial and technical	3 Non-manual	4 Skilled manual	5 Semi-skilled	6 Unskilled	7 All others gainfully occupied and unknown
South Dublin County	6%	27%	19%	18%	10%	4%	17%
Dublin City	7%	22%	16%	14%	10%	5%	25%
DLR	13%	38%	16%	10%	5%	2%	15%
Fingal	7%	33%	19%	15%	8%	3%	14%
DMR	8%	28%	17%	15%	9%	4%	20%
State	6%	26%	16%	17%	11%	6%	18%

Source: 2002 Census

The high skilled group is comprised of persons in the first two occupational groups listed in table 4.3, the professional workers and the managerial and technical groups. The lower skilled group is composed of occupational groups five and six in the table, persons in semi-skilled or unskilled manual employment. On the basis of this classification 33% of the population of South Dublin County is in the high skill category and 14% in the lower status grouping. While two local authority areas, Dun Laoghaire-Rathdown and Fingal, have proportionately higher numbers of people in the higher skill categories, overall, the figures for South Dublin County correspond closely to the skills distribution of the population in the Dublin Metropolitan Area and in the State as a whole.

4.3.1 A Skills Profile of the Labour Market in South Dublin County

Table 4.4 provides a detailed breakdown of the labour force in South Dublin County. The populations of Firhouse, Lucan, Rathfarnham and Templeogue have the highest percentages of people in the two highest skilled categories (professional workers and managerial and technical workers). In Rathfarnham, 58% of the population is within this category. Rathfarnham is followed by Firhouse and Templeogue (both 48%) and then Lucan (44%). The concentration of employment within these categories reflects the higher levels of educational attainment in these areas. In terms of the percentage of the workforce in the two lowest skill categories, slightly higher percentages are found in Clondalkin, Tallaght and Palmerstown.

Table 4.4 South Dublin County: Percentage distribution of persons aged 15 years and over, classified by occupational grouping, 2002

Geographic Area	1 Professional workers	2 Managerial and technical	3 Non-manual	4 Skilled manual	5 Semi-skilled	6 Unskilled	7 All others gainfully occupied and unknown
Clondalkin	2%	19%	19%	22%	13%	5%	20%
Lucan	9%	35%	19%	16%	8%	2%	11%
Palmerstown	3%	22%	18%	21%	12%	6%	18%
Tallaght	2%	16%	18%	22%	13%	6%	23%
Firhouse	9%	39%	20%	14%	5%	1%	11%
Rathfarnham	14%	44%	18%	8%	4%	1%	10%
Templeogue	10%	38%	21%	14%	5%	2%	11%
Terenure	4%	25%	21%	22%	10%	3%	15%
Other	7%	33%	17%	17%	8%	3%	15%
South Dublin County (2002)	6%	27%	19%	18%	10%	4%	17%
South Dublin County (1996)	5%	22%	21%	23%	13%	6%	10%
% Change (1996 – 2002)	1%	5%	-2%	-5%	-3%	-2%	7%

Source: Derived from the 2002 and 1996 Census

From a development perspective, it is interesting that the percentage of the labour force in the high skilled category increased by 6% between 1996 and 2002 (final column in table 4.4). There were also considerable changes at the lower end of the scale. The percentage of the labour force in the two lowest skill categories decreased by 5% over the 1996-2002 period. The changing skills profile within the county viz. the upgrading of the workforce, is mirrored in the increase in educational qualifications within the county over the same period.

4.4 Levels of Educational Attainment

Education has played a central role in Ireland's economic development and continues to be a key factor in the creation of competitive advantage. Table 4.5 shows the percentage distribution of the population over 15 in the Dublin Metropolitan Area classified by highest level of educational attainment completed. The predominance of those with degree qualifications or higher in the Dublin Metropolitan Area can be seen in this table, with 18% of the population having attained a degree qualification or higher compared with 13% in the state as a whole.

Table 4.5 Dublin Metropolitan Area: Percentage distribution of population aged 15 years and over, classified by highest level of educational attainment, 2002

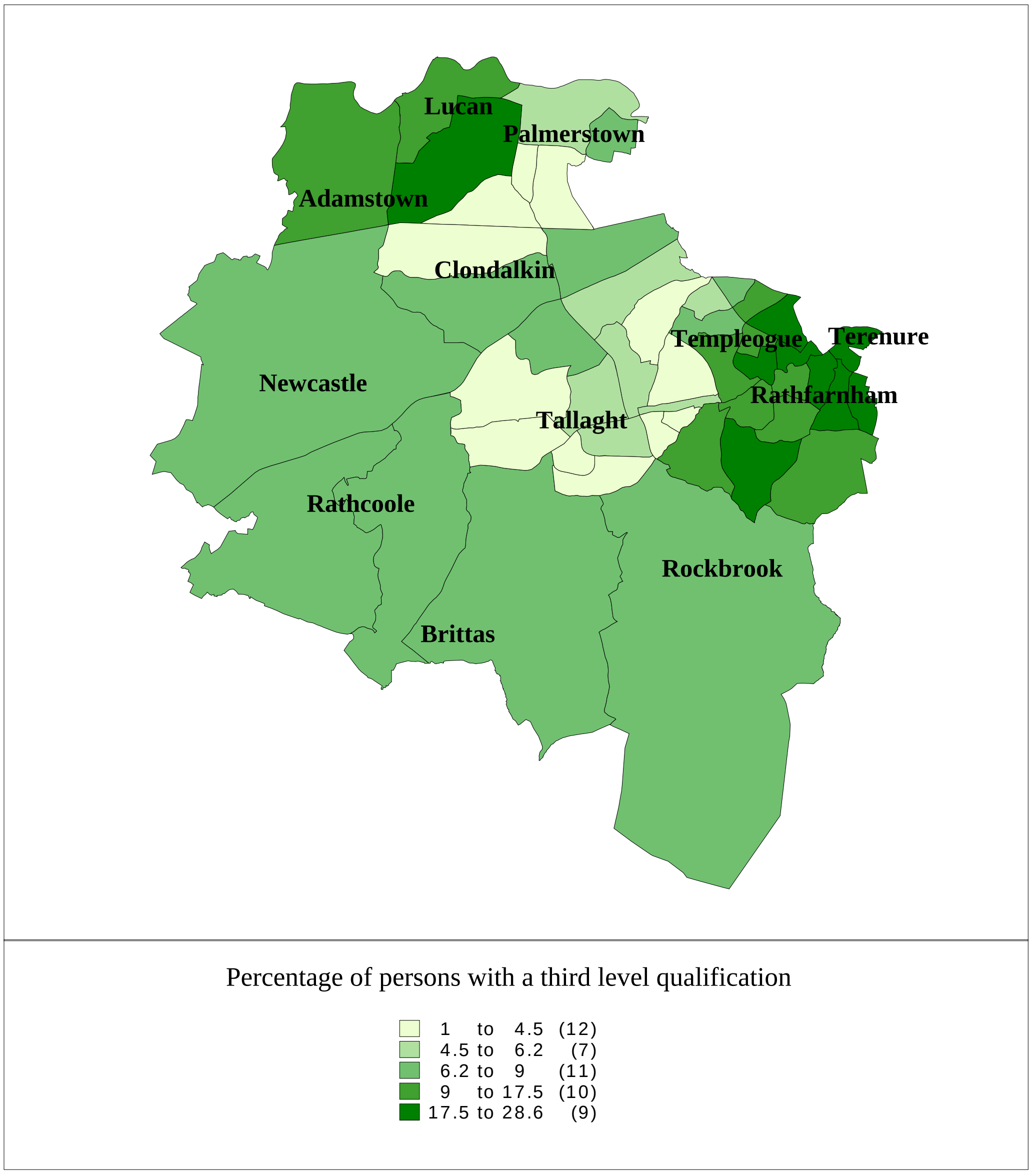
Education level	State	DMR.	Dublin City	DLR	Fingal	South Dublin 1996	South Dublin 2002	Change 1996 – 2002
Primary (incl. no formal education)	18%	15%	18%	9%	11%	23%	14%	-9%
Lower secondary	18%	15%	15%	11%	16%	23%	18%	-5%
Upper secondary	23%	22%	19%	23%	27%	32%	26%	-6%
Third Level	21%	26%	25%	36%	27%	19%	22%	+3%
• *Third level – Non-Degree*	*8%*	*8%*	*7%*	*10%*	*10%*	*10%*	*9%*	*-1%*
• *Third Level – Degree or higher*	*13%*	*18%*	*18%*	*26%*	*17%*	*9%*	*13%*	*+4%*
Not stated	4%	6%	8%	3%	4%	2%	4%	+2%

Source: 2002 and 1996 Census

The level of educational attainment of the population of South Dublin County improved considerably over the 1996-2002 period. In 1996, 23% of the county population had only a primary level education and 19% had obtained a third level qualification. By 2002, 22% of the population possessed a third-level qualification, and only 14% had a primary level of education.

Using small area statistics data for South Dublin County, Figure 4.1 shows the distribution of third level qualifications within the county by electoral division.

Figure 4.1 Percentage distribution of third level qualifications in South Dublin County



Source: Derived from 2002 Census

The areas with the highest levels of educational attainment are the more affluent areas of Rathfarnham, Terenure and Templeogue, and the new, more recently developed areas of Lucan and Firhouse. In 2002, between 17.5 and 28.6% of the population within these areas had a third level qualification. At the other end of the spectrum, 12 EDs within the county had a very low percentage of the population (between 1% and 4.5%) with a third level qualification. These were the EDs of Tallaght (Jobstown, Fettercairn, Kilnamanagh, Tymon and Millbrook) and Clondalkin (Dunawley, Moorfield, Cappaghmore and Rowlagh).

Education has emerged as the main influence on employment prospects and its importance has increased with the reorientation of employment towards higher skilled occupations. It is expected that by 2015, 45% of all jobs will be for third level graduates, compared with less than 30% in 1997, and that over three in four net new jobs over the period to 2015 will be for graduates.[71]

4.5 Educational Specialisation in South Dublin County

The match between the education system and the labour market is important. Table 4.6 provides a breakdown of the third level qualifications achieved in the Dublin Metropolitan Area, classified by subject area. Table 4.6 ranks third level qualifications in order of importance for South Dublin County. The highest percentage of graduates are in the business category, followed by engineering and architecture and medical-related qualifications. By comparison with the other local authority areas, South Dublin County has the highest percentage of graduates in the categories of (i) computing and information technology, (ii) education, physical sciences and chemistry and (iii) engineering and architecture.

[71] Source: based on FÁS/ESRI "*Manpower Forecasting Studies Report No. 10: Occupational Employment Forecasts 2015*", March 2002. Refer to Figure 3.1 and 3.4 (a).

Table 4.6 Dublin Metropolitan Area: Percentage distribution of persons aged 15 years and over with a third level qualification attained, classified by main subject area, 2002

Third level qualifications	DMR	Dublin City	DLR	Fingal	South Dublin	State
Social Sciences, Business and Law	21.81%	22.10%	23.33%	20.67%	20.02%	17.16%
Engineering and Architecture	9.11%	8.40%	8.92%	9.84%	10.58%	10.00%
Medical and related	9.93%	9.51%	10.19%	10.75%	9.86%	12.06%
Computing and Information Technology	6.96%	7.11%	5.83%	7.41%	7.68%	6.42%
Humanities	8.25%	9.50%	8.79%	6.45%	5.92%	6.77%
Education	4.77%	4.30%	4.91%	5.12%	5.50%	6.62%
Tourism and other	3.89%	3.87%	2.92%	4.57%	4.64%	5.00%
Art	4.32%	5.10%	4.21%	3.32%	3.40%	3.56%
Physical Sciences and Chemistry	2.46%	2.41%	2.38%	2.53%	2.64%	2.76%
Life Sciences and Medical Laboratory Science	2.34%	2.35%	2.58%	2.06%	2.27%	2.31%
Mathematics and Statistics	1.02%	1.09%	0.98%	0.92%	0.97%	0.81%
Agriculture, Forestry, Fishery and Veterinary	0.91%	0.75%	1.05%	1.19%	0.88%	2.59%
Other third level qualification	8.89%	7.88%	8.03%	10.70%	11.01%	9.29%
Not stated	0.77%	0.81%	0.62%	0.77%	0.85%	0.94%
Multiple subjects	14.57%	14.83%	15.25%	13.70%	13.79%	13.71%

Source: Census 2002

4.5.1 Occupational Forecasts to 2015

Table 4.7 shows FÁS/ESRI occupational employment forecasts to 2015.[72] Over the period 2004-2015 the occupations that are predicted to experience the greatest growth are those of childcare, computer professionals, health professionals, software engineers and business and science professionals. Table 4.7 ranks these in order of importance. The demand for people with skills in the areas of catering, retail sales and education, is also expected to increase over the coming decade.

[72] *Manpower Forecasting Studies Report No. 10: Occupational Employment Forecasts 2015* (FÁS/ESRI, March 2002).

Table 4.7 ESRI/FAS occupational employment forecasts to 2015

Occupation	Change 2000-2015	Occupation	Change 2000-2015
Childcare	117%	Sales agents	17%
Computer associate	60%	Electrical operatives	12%
Health associate professional	53%	Engineering associate	12%
Health professionals	52%	Food, Drink operatives	1%
Software engineers	52%	Electricians	-1%
Business, Finance	43%	Skilled building workers	-2%
Science professionals	37%	Wood craft workers	-2%
Other sales	36%	Engineering craft	-3%
Other personal service workers	34%	Printers	-4%
Science associate	33%	Fitters and mechanics	-8%
Drivers	27%	Engineering operatives	-13%
Education professionals	27%	Clothing and Textiles	-34%
Catering	24%	Clothing, textiles operatives	-51%
Retail sales	18%		

Table 4.7 also shows a predicted decline in the demand for engineering operatives, electricians and fitters and mechanics. The demand for clothing and textiles operatives is expected to fall as these labour-intensive occupations are no longer competitive in the Irish economy. The Irish clothing and textiles sector has been in decline (in employment terms) since the 1970s. Firms have gradually shifted their production operations overseas while retaining the higher value-added parts of the production process i.e. the design, marketing, management, finance and logistics functions, in the domestic economy. The internationalization of production by Irish firms is not just confined to traditional sectors; it is also evident in sectors such as engineering and furniture where the tendency to subcontract production operations to low-cost locations is increasing.

4.6 Education Infrastructure

At a national level, responsibility for education lies with the Department of Education and Science. The Department is charged with administering all aspects of educational policy. The Irish education system is ranked fourth from 55 countries for meeting the needs of a competitive economy and is ranked second (after Canada) for having the highest percentage of 25-34 year-olds to have attained third level education.[73] Table 4.8 shows expenditure on education as a percentage of total public expenditure for Ireland and selected EU countries (OECD, 2003).

Table 4.8 Public Expenditure on Education as a percentage of total Public Expenditure

Country	Total % All Levels	Primary & Secondary %	Third Level %
Ireland	13.5	9.3	4.1
Portugal	12.7	9.2	2.3
UK	11.8	8.3	2.5
France	11.4	8.0	2.0
Spain	11.2	7.8	2.4
Netherlands	10.7	7.0	2.9
Belgium	10.6	6.9	2.6
Italy	10.0	6.9	1.8
Germany	9.9	6.6	2.4

Source: Education at a Glance, OECD 2003

A higher share of public expenditure is devoted to education in Ireland (at all levels) than in other EU countries.[74] The divergence between Ireland and the other EU countries is

[73] Source: *The IMD World Competitiveness Yearbook, 2003*.
[74] The most recent OECD Review of the higher education system in Ireland (OECD, 2004, p.14) relates expenditure on education in Ireland to GDP. Using this measure, total expenditure on higher education as a percentage of GDP in 2001 was 3.1%. This was below the OECD mean of 3.8%. However, the use of GDP rather than GNP figures is misleading in Ireland's case. For example, in 2001, GDP was €114,479m but GNP was substantially lower at €96,802 (CSO, 2002). The gap between GDP and GNP reflects the high level of multinational involvement in the economy. This gap has also widened since the 1990s and therefore using GDP figures gives a misleading view of the level and trend

particularly evident in the area of third level education with Irish government expenditure almost doubling that of most other countries. These characteristics of the Irish education system are reflected in South Dublin County in the educational specialisation of the workforce, the high participation in third level education, and the well-functioning links between government, academia and industry.

The educational system has traditionally been divided into three levels, primary, secondary and third level.

4.6.1 Primary Education

There are 94 primary schools in South Dublin County, with a total of 27,377 students in the academic year 2002-2003. At primary level, 26,963 students attend 88 ordinary primary schools. In addition there are 6 schools that cater for 414 children with special needs.[75] The average ordinary class size for the 2001/2002 academic year was 25.89, which is slightly above the national average of 24.2.[76]

4.6.2 Second Level Education

There are 32 second level schools in the county, with a total of 18,196 students. In the academic year 2002-2003 there were (i) 13 secondary schools with total enrolment of 7,877; (ii) 11 vocational schools with 5,411 pupils in attendance, and (iii) 8 community

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in education spending in Ireland in recent years, and particularly in comparison to other OECD countries.

[75] Information supplied by Mr. John Maloney, Department of Education Regional Office, Tallaght.

[76] Refer to the *2001-2002 Statistical Report*, Department of Education, 2003, pp.16, 25, 26, 29.

schools with 4,908 students enrolled.[77] In recent years, increased resources have been channelled into primary and secondary level education in recognition of the importance of early schooling for the social, cultural and academic development of young people.

4.6.3 Third Level Education

When it comes to third level education, the county must be viewed within the wider context of the Dublin Region. The provision of third level educational facilities within the State is biased towards Dublin, with over 42% of third level facilities and college places located within the region.[78] Among the third level facilities located in the Greater Dublin Area are:

- University College Dublin, the largest university in Ireland with 15,316 full-time and 4,291 part-time students
- Trinity College Dublin with 11,212 full-time and 2,905 part-time students
- Dublin City University with 6,381 full-time and 1,279 part-time students
- The National University of Ireland (NUI), Maynooth, with 4,510 full-time and 606 part-time students
- The National College of Ireland (NCI), with 900 full-time students and 2,929 part-time students

In addition to the traditional university sector, other third level institutions include:

- St. Patrick's College Drumcondra, with 1,837 full-time and 180 part-time students
- The Royal College of Surgeons with 1,431 full-time students

[77] Source: Department of Education, List of Post Primary Schools with Principal and Enrolment for School Year 2002/2003, which is available from http://www.education.ie/servlet/blobservlet/ppschoools_2002.xls.

[78] *Meath Strategy for Higher Education* (Farell-Grant-Sparks Consultants 2002, p 29).

- The National College of Art and Design with 808 full-time and 24 part-time students
- Dublin Institute of Technology with 9,873 full-time and 5,443 part-time students
- Blanchardstown Institute of Technology with 626 full-time and 324 part-time students
- Dun Laoghaire Institute of Art, Design & Technology with 1,120 full-time and 55 part-time students
- The Institute of Technology, Tallaght, with 2,500 full-time and 1,800 part-time students

The Institute of Technology, Tallaght is the only third level college located within South Dublin County. The Institutes of Technology were established as autonomous bodies by the Oireachtas in 1992 for the provision of third level education. A comprehensive range of courses (from National Certificate, National Diploma, Bachelors Degree to Masters Degree and Doctoral level) is offered at the Institute and ITT has established partnerships with other professional bodies such as the Irish Management Institute (IMI), the Institute of Professional Auctioneers and Valuers (IPAV), the Institute of Accounting Technicians in Ireland (IATI) and the Supply Chain Management Institute (IPICS).

Since its establishment in 1992, the Institute has developed close links with industry located in the region. Tailored academic programmes have been delivered to meet the needs of companies, such as Intel, Hewlett Packard, Wyeth Medica, Bayer Diagnostics, CISCO, Microsoft, Fujitsu, Lucent, and Smurfit Group, as well as Tallaght Hospital and the Department of Enterprise and Employment. Through consultancy testing and prototyping services, the college also has links with local companies, such as 3COM, Howmedica, IBM, Motorola, Oral B and Unidare. Facilities at the college include a complete pharmaceutical formulation prototyping plant, advanced chemical analysis equipment, a semiconductor device fabrication and characterisation facility and a selective laser sintering machine for rapid prototyping. The Institute also has a National Pharmaceutical Education Centre. This is a €4m state of the art facility designed to replicate the core operations of modern biotechnology and pharmaceutical plants. The volume of research undertaken in the Institute in the fields of Biology, Chemistry, Engineering and Humanities has grown rapidly over the last decade. Since 2000, almost €9m in funding has been received from competitive programmes.

The HEA report, *Review and Prioritisation of Capital Projects in the Higher Education Sector (2004)*, has recommended that the Institute of Technology, Tallaght, receive more €60m in funding over the next ten years. This is the third highest funding allocation, ahead of 24 other colleges across the county. The funding is to provide for an engineering centre and various other strategic developments, including investment in a businesss and humanities facility and a catering and tourism building.

4.6.4 Adult Education and Training

A number of other agencies and organisations provide education and training services in the county. These include (i) the County Dublin Vocational Educational Committee, which provides a wide range of courses from 22 centres in South Dublin including locations in Tallaght, Clondalkin and Lucan; (ii) the National Training Agency (FÁS); (iii) local development organisations such as the KWCD partnership and the area-based partnerships in Clondalkin and Tallaght; and (iv) the community and voluntary sector, which provides development opportunities targeted at specific groups (older people, refugees, drug users etc.).

4.6.5 Human Resource Recruitment Infrastructure

The county also has a vibrant human resource consultancy network. Human resource agencies located within the county are experienced analysts in identifying skills in the local labour market and recruiting skilled professionals across a range of sectors, including finance, ICT, engineering, and science. There is a large stock of available expertise and recruitment agencies have little or no difficulty satisfying clients' needs across the functional specialisms of business. From a recruitment perspective South Dublin County is an attractive area for people to live and work. It offers an attractive lifestyle in that people can live in a semi-rural situation that is still proximate to their place of work. Many professionals, including Irish people who have worked internationally, are interested in working in Dublin, often for social and cultural reasons.

Part 5. The Economy of South Dublin

5.1 Introduction

South Dublin County as a whole has prospered considerably in the last decade. The growth sectors in the county are biotechnology and pharmaceuticals, metals and engineering, ICT, hospitality, transport and logistics, and internationally traded services. The transport and logistics sector is an important sector; this is not surprising given the strategic location of South Dublin within the Greater Dublin Area and also within the national and international contexts.

There are 39 industrial estates in the county and 46 business parks, including two recently developed international business parks. A list of industrial estates and business parks (by location) is provided in Appendix F.[79] The two international business parks are Grange Castle, which is located to the west of Clondalkin, and Citywest which is located west of Tallaght. The National Digital Park is situated in the Citywest Campus and is a hub for high-technology communications and electronic commerce companies in Europe. Over 100 companies employing 2,000 people are located in the Citywest Business Campus, including high-tech indigenous and multinational companies such as Eircom, Iomega, Xilinx, Nortel, TDK, Rhone, Rhone-Poulenc Rorer, Viking, Tuchenhagen, Saturn, Merck, Act Manufacturing, and Netscape. Foreign direct investment (FDI) is a very significant contributor to economic activity and employment in the county. Multinational Companies (MNCs) are a critical source of new technology introduction and provide vital technological and knowledge spillovers that serves to enhance the innovative capacity of indigenous firms.

[79] Many of the industrial estates and business parks listed in Appendix E are quite small. *The South Dublin County Development Plan (2004)* points out that there are 16 major industrial estates. These may be identified from the list in Appendix E as those with greater than 50 firms.

The second major international business park, Grange Castle, is situated in the north west of the county. It is a major location for multinational activity and home to two of the worlds leading producers of biotechnology and pharmaceuticals, Wyeth and Takeda. Wyeth has an 87-acre biopharmaceutical campus at Grange Castle while Takeda, Japan's largest pharmaceutical company, is in the process of developing a bulk production and research facility at Grange Castle Business Park. Together with Science Foundation Ireland and Bioresearch Ireland, these companies are contributing to the development of a biotechnology hub in South Dublin County. There is potential to nurture the development of a pharmaceuticals cluster through greater interaction between hospitals, businesses and academia in the County.

5.2 An Industrial Profile of South Dublin County

Table 5.1 provides a summary profile of the industrial base of South Dublin County using census data on employment by broad industrial category. In 2002, employment within South Dublin County was 110,101; this represented 21.6% of total employment in the Dublin Metropolitan Region. A breakdown of this employment by industry sector is provided in table 5.1 along with data for the Dublin Metropolitan Region. In order to highlight the absolute and relative importance of the different industry sectors to the local economy the different industry sectors are ranked in order of importance. The highest percentage of the workforce is employed in (i) the wholesale and retail trade, (ii) manufacturing industry, (iii) real estate, renting and business activities, and (iv) construction. The sectoral distribution of the labour force in South Dublin County mirrors the distribution of employment in the Dublin Metropolitan Region although the ranking of the different sectors is slightly different.

Table 5.1 Number of Persons at work by sector, South Dublin County and Dublin Metropolitan Area, 2002

	Dublin Metropolitan Area		South Dublin	
Industry Sector	**Employment**	**% Total Employment**	**Employment**	**% Total Employment**
Wholesale and retail trade	68,262	13.44%	18,999	17.26%
Manufacturing industries	54,412	10.71%	14,390	13.07%
Real estate, renting and business activities	71,977	14.17%	12,162	11.05%
Construction	32,334	6.36%	9,094	8.26%
Health and social work	43,380	8.54%	8,741	7.94%
Transport, storage and communications	41,260	8.12%	8,738	7.94%
Public administration and defence	32,056	6.31%	7,138	6.48%
Banking and financial services	37,604	7.40%	6,620	6.01%
Education	32,885	6.47%	6,252	5.68%
Other community, social and personal service activities	24,031	4.73%	4,757	4.32%
Hotels and restaurants	22,631	4.45%	4,512	4.10%
Electricity, gas and water supply	3,465	0.68%	755	0.69%
Agriculture, forestry and fishing	2,711	0.53%	411	0.37%
Mining, quarrying and turf production	349	0.07%	113	0.10%
Industry Not Stated	40,673	8.01%	7,419	6.74%
Total	**508,030**	**100%**	**110,101**	**100%**

Table 5.1 shows clearly the predominance of the services sector. The agriculture, forestry and fishing category accounts for less than 1% (0.37) of employment in the county. Manufacturing accounts for just over 13% and three other industry categories: mining and quarrying; electricity, gas and water supply; and construction - account for just 9% of employment. The remaining economic activities in the county constitute services. Within the services sector, the wholesale and retail trade, and the real estate, renting and business activities categories, are the most important. Other important service sector activities include: transport, storage and communications; health and social work; public administration and defence; banking and financial services; and education.

5.3 The Changing Nature of Employment

Table 5.2 compares the number of persons at work by sector in 1996 and 2002. This comparison, although it is over a relatively short period of time, is useful in identifying shifts in the relative share of the different sectors in total industry employment. The industry categories used in the 1996 census were slightly different from those employed in the 2002 census, so in order to make the two compatible, the data in table 5.2 is presented in a slightly different format.[80]

Table 5.2 Number of Persons at work by sector, South Dublin 1996 and 2002

Industry Sector	South Dublin 1996	South Dublin 2002	Change 1996 – 2002
Commerce, Insurance & Finance	27.19%	38.41%	+11.23%
Wholesale and retail trade			
Hotels and restaurants			
Transport, storage and communications			
Banking and financial services			
Professional Services	17.00%	17.94%	+0.94%
Education			
Health and social work			
Other community, social and personal service activities			
Manufacturing industries	19.47%	13.07%	-6.40%
Construction	6.97%	8.26%	+1.29%
Transport, storage and communications	8.03%	7.94%	-0.09%
Public administration and defence	7.45%	6.48%	-0.97%
Electricity, gas and water supply	0.97%	0.69%	-0.29%
Agriculture, forestry and fishing	0.44%	0.37%	-0.07%
Mining, quarrying and turf production	0.15%	0.10%	-0.05%
Industry not stated	12.33%	6.74%	-5.60%
Total employed	**82,978**	**110,101**	

Source: 2002 and 1996 Census

[80] The following industry sectors in table 5.1: wholesale and retail trade; hotels and restaurants; banking and financial services; and real estate, renting and business activities; are amalgamated under the heading, *commerce, insurance and finance* in table 5.2. Similarly, the education; health and social work; other community, social and personal service activities sectors in table 5.1 are brought together under the heading of *professional services* in table 5.2.

In 1996 manufacturing industry accounted for almost one fifth (19.47%) of employment within South Dublin County; however, by 2002 employment in manufacturing declined by 13% (from 16,157 in 1996 to 14,390 in 2002). The relative share of services increased over the same period. This is demonstrated in the increase in the percentage of the workforce employed in the commerce, insurance and finance category (from 27.1% in 1996 to 38.4% in 2002) and in the increase in employment in the professional services category. All other sectors, with the exception of construction, declined over the period, with the largest decrease in the manufacturing sector.

The census of population provides useful information on the broad industrial sectors in which people are employed. This information is based on where people reside not where they work, therefore in order to build up a profile of economic activities within the county, it is necessary to examine additional information sources, namely: (i) Forfás data on manufacturing and services activities within the county, (ii) data on rateable accounts supplied by the local authority (iii) information provided by Kompass Ireland on the number of firms within the county by geographical area and sector of activity, (iv) information supplied by the County Enterprise Board and other local enterprise centres on new business start-ups, and (v) DTO data on the number of jobs in South Dublin County, which together with census data on the labour force may be used to calculate jobs ratios and labour densities.

5.4 The Manufacturing and Services Sector: IDA and Enterprise Ireland Supported Firms

In the absence of CSO data[81], the Forfás Database provides an alternative source of information on the composition of economic activities at county level. Forfás is the State agency with overall responsibility for the development of industrial policy in Ireland. It acts as an umbrella agency for IDA Ireland, which seeks to promote foreign

[81] The CSO does not provide a breakdown of data on economic activities at county level.

investment in the Irish economy and its counterpart, Enterprise Ireland, which seeks to foster the development and growth of the domestic industry base.

Table 5.3 provides an overview of IDA and Enterprise Ireland supported manufacturing and services activities in South Dublin County by sector, number of firms and employment. For comparative purposes it also provides data for the rest of the Dublin region. It is important to note that this data relates only to agency-supported companies (firms supported by IDA and Enterprise Ireland); it excludes County Enterprise Board companies (firms with less than ten employees)[82] and it excludes all non-assisted companies. However, since many of the larger firms in the county as well as SMEs receive some form of support from the state agencies, the Forfás database is a useful source of information.

The four most important areas in terms of manufacturing employment are (i) metals and engineering (42.5%), (ii) food, drink and tobacco (26.3%), (iii) paper and printing (12.9%), and (iv) chemicals (8.1%). In 2003, these four sectors accounted for almost 90% of total manufacturing employment in agency-supported firms. Table 5.3 shows that South Dublin County accounts for more than one third of agency-supported firms in the metals and engineering category in the Dublin Metropolitan Region. The metals and engineering category (NACE 27-35)[83] includes the manufacture of basic metals and fabricated metal products; the manufacture of office machinery and computers; the manufacture of electrical and optical equipment; and the manufacture of motor vehicles and other transport equipment (including trains, ships and aircraft).

[82] This is dealt with in section 5.8 which focuses on new enterprise development.

[83] NACE Rev.1.1 is a statistical classification of economic activities. NACE is an acronym for 'Nomenclature générale des activités économiques dans les communautés européennes' (General Industrial Classification of Economic Activities within the European Communities).

Table 5.3 Manufacturing and Services Activities in South Dublin County supported by Enterprise Ireland and IDA Ireland

	South Dublin County			Rest of Dublin	
Sector	**Full-time Employment 2003**	**As % Total Manufacturing in South Dublin**	**No. of Firms**	**Full-time Employment 2003**	**No. of Firms**
15.1-15.8 Food	1,750	14.7	37	7,343	124
15.9-16 Drink & Tobacco	1,385	11.6	6	1,492	11
17 Textiles	28	0.2	2	383	39
18-19 Clothing, Footwear & Leather	73	0.6	5	1,188	68
20 Wood & Wood Products	24	0.2	2	590	24
21-22 Paper & Printing	1,541	12.9	36	5,448	145
24 Chemicals	963	8.1	19	4,779	81
25 Plastics & Rubber Products	345	2.9	14	957	45
26 Non-Metallic Minerals	130	1.1	5	1,005	48
27-35 Metals & Engineering	5,072	42.5	122	11,357	305
36.1 Furniture	394	3.3	14	1,023	54
36.2 – 36.9 Miscellaneous Manufacturing	236	1.9	22	1,063	109
Total Manufacturing (15-37)	**11,941**	100%	**284**	**36,628**	**1,053**
Misc. Activities (Mining, Quarrying etc.)	152		12	1,695	113
Services					
65-67 International Financial Services	**4**		**1**	8,903	239
72-74, 80 Other Internationally Traded Services	2,893		77	33,399	845
Total Agency-Supported Firms	**14,990**		**374**	**80,625**	**2,250**

Source: Derived from Forfás Database

Although the share of manufacturing industry in total employment in the county decreased over the 1996-2002 period, the manufacturing sector continues to be very important to the local economy. It is important as a generator of employment and income; it is also important in generating a demand for services and contributing to export performance. The chemicals[84] and metals and engineering sectors are highly export-oriented; these advanced sectors account for more than half of total manufacturing

[84] NACE code 24 is defined as chemicals. This classification includes the manufacture of pharmaceuticals.

employment among agency-supported firms. The manufacturing sector itself is also changing. Traditional sectors such as the food, drink and tobacco, have been transformed through the use of new technology. Some of the more labour-intensive sectors of manufacturing, such as clothing and textiles have also declined, while the more high-tech, knowledge-intensive sectors such as chemicals/pharmaceuticals and electronics have experienced growth. Much of the expected employment growth within the county over the next decade is expected to come from within the more advanced sectors of manufacturing.

5.4.1 Foreign Versus Indigenous Industry

A breakdown of the four most important sectors of manufacturing by nationality of ownership is provided in table 5.4.

Table 5.4 Key Manufacturing Sectors in South Dublin County By Nationality of Ownership

Sector	Employment South Dublin County 2003	% Total Manufacturing Employment in South Dublin County	% Employment Foreign-owned Firms	% Employment Irish-owned Firms	As % Total Employment in DMR
27-35 Metals & Engineering	5,072	42.5	45.1	54.9	30.9
15–16 Food, Drink & Tobacco	3,135	26.3	59.6	40.4	26.2
21-22 Paper & Printing	1,541	12.9	2.7	97.3	22.0
24 Chemicals	963	8.1	51.8	48.2	26.8

Source: Derived from Forfás Database

The most important sector, metals and engineering, accounted for 42.5% of total output in 2003. This sector is primarily Irish-owned; foreign firms accounted for 45.1% of employment and Irish firms for the remaining 54.9%. The chemicals sector and the food, drink and tobacco sector are both dominated by foreign firms. There is very little foreign involvement in paper and printing; Irish firms accounted for 97.3% of employment in this sector. The final column in Table 5.4 shows the contribution of South Dublin County to total employment of agency-supported firms in the Dublin Region. In 2003, the metals and engineering sector in South Dublin County accounted for almost one third (30.9%) of total employment in the DMR. The other three sectors each accounted for approximately one quarter of total employment in their relative categories.

The composition of manufacturing activities in South Dublin County reflects the pattern of sectoral specialisation within the DMR and within the national economy generally. At the national level, the most important sectors are (i) metals and engineering, which accounts for 41.6% of total manufacturing employment, (ii) food, drink and tobacco (20%), (iii) chemicals (9.8%) and (iv) paper and printing (9.6%).[85]

5.4.2 Internationally-Traded Services

In 2003, there was only one agency-supported firm in the international financial services sector in South Dublin County (see table 5.3). The majority of firms eligible for support in the area of financial services are located in the International Financial Services Sector (IFSC) in the city-centre. In the 'other internationally traded services category' there were 77 firms, accounting for 2,893 jobs. The majority of firms (65 companies) were Irish and 12 were foreign. The 'other internationally traded services category' includes NACE codes 72-74 and 80. NACE code 72, the *Computer and Related Activities* sector, comprises hardware consultancy; software consultancy and supply; data processing; database activities; maintenance and repair of office, accounting and computing machinery; and 'other computer related activities'. NACE code 73, *Research and Development*, includes research and experimental development on natural sciences and engineering, and research and experimental development on social sciences and humanities. NACE code 74, *Other Business Activities*, encompasses a wide range of activities including legal, accounting, book-keeping and auditing activities; tax consultancy; market research; legal activities; business and management consultancy;

[85] Source: Derived from the most recent *Census of Industrial Production*, 2001, Table B, p.11.

management activities of holding companies, architectural and engineering activities and related technical consultancy; technical testing and analysis, advertising; labour recruitment and provision of personnel; industrial cleaning, packaging activities, photographic activities; secretarial and translation activities; and other business activities n.e.c. NACE code 80, which is *Education*, encompasses education services with an international dimension.

Although South Dublin County accounts for a high percentage of agency-supported manufacturing firms in the Dublin Metropolitan Region, it accounts for less than 8% of employment and only 8.3% of firms in the 'other internationally traded services' sector. This suggests the need to increase investment and to further promote the development of the internationally-traded services sector of the local economy. This sector is a vital source of future growth.

Despite the potential that exists to develop tourism and leisure-related activities in the county, this sector remains undeveloped. To address this, a tourism audit was undertaken[86] to examine the potential of the sector and to support investment in the tourism infrastructure. The county has considerable recreational and tourist potential arising from its rich historic and cultural heritage and from the natural beauty of the county, particularly to the south east, which embraces the Dublin Mountains. With the decline in agriculture, rural areas such as Rathcoole, Newcastle, Ballinascorney, Saggart and Brittas are also undergoing considerable change and these parts of the county have the potential to exploit opportunities in tourism. The *Rural Dublin Leader Programme*[87] has supported two tourism-related projects in the rural parts of the county over the last two years, however, the promotion of tourism and tourist-related activities pertains to the whole of the county and there is scope for further development of this sector.[88]

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[86] In January 2005, a Tourism Company was incorporated to identify and develop ways to promote tourism within the county.

[87] Refer to section 5.8 of this report on the activities of *Rural Dublin Leader*.

[88] There is no specific NACE code for tourism; it falls under a number of NACE code categories, such as NACE 55 which is *hotels and restaurants*; NACE 92, which is *recreational, cultural and sporting activities*; NACE codes 60-61, which covers *land and*

Most tourism within the county is business generated. The County provides an ideal location for business-related conferences and activities, with an existing network of hotels and conference facilities that serve the business market. The advantage of many high quality hotels[89] in South Dublin County is that they are strategically located and easily accessible by all of the major national road routes and the M50, which links to the airport.[90] These hotels provide an ideal out-of-city business location with excellent parking, golf, spa, and other leisure-related activities that facilitate the business tourism sector. The strong concentration of businesses in South Dublin County suggests that the future development of the sector lies in the promotion of the business tourism sector (and the marketing of corporate functions and leisure-related activities); however, there is also considerable scope for the development of leisure tourism, especially in the Dublin Mountains.

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air transport and NACE 63, which covers the *activities of travel agencies*. Tourism also impacts on the *wholesale and retail trade* (NACE 51) and manufacturing industry e.g. the *manufacture of crafts* (NACE 17-18). Using travel expenditures as a proxy, the CSO recorded a net outflow of travel and tourism expenditures of €121m in 2003 and a net outflow of €89m over the period January to March 2004. These figures relate to the economy as a whole; statistics are not provided at county level. However, the deficit on the tourism balance of payments points to the need to develop the tourist industry throughout the economy; this is an important internationally-traded service that contributes to our export performance. On the other hand, an important factor undermining the competitiveness of the tourism sector is the high cost of services in the economy.

[89] Citywest is the largest international conference, leisure and golf hotel in Ireland and one of Europe's most popular International Conference resorts. The Citywest Hotel offers conference facilities for up to 3,500 delegates, with 725 hotel rooms, lively bars and restaurants, a leisure centre and two state-of-the-art golf courses. The Centre and all of its support facilities, including 20 meeting rooms and breakout suites, are fully air conditioned and equipped with the most advanced audio visual and IT equipment. Other sports and activities are available nearby including trout angling, horse-riding, clay pigeons, horse racing and walking in the Dublin and Wicklow Mountains.

[90] There are several other large hotels in the County that serve the business market e.g. the Plaza Hotel, the Red Cow Moran Hotel, the Lucan Spa Hotel, IBIS and Bewleys.

5.5 Analysis of Local Authority Rateable Accounts

An alternative source of information on the economy of South Dublin County is the number of rateable accounts payable to the local authority and the type of activities to which these relate. In 2004, there were 5,697 rateable accounts payable to the County Council. There are over 300 different rate categories[91] and analysis of this data yielded interesting results. Table 5.5 provides a breakdown of local authority rateable accounts, ranking them in order of importance.

Table 5.5 Breakdown of Local Authority Rateable Accounts

Rates Category	Number of Rateable Accounts	% Total Rateable Accounts
Warehousing	1,937	34.0
Office Activities	1,022	17.9
Shop/Supermarket/House Shop	972	17.1
Workshop	480	8.4
Factory	207	3.6
Surgery/Health Centre	136	2.4
Mast/Antenna/Telecom Network/Telephone Exchange	99	1.7
Restaurant/café/hotel	72	1.3
Beauty/Hair Salon	67	1.2
Garage/Filling Station	65	1.1
Creche/Montessori/Pre-school	60	1.1
Club House/Community Centre/ Sports Centre/Gymnasium	57	1.0
Bank/Building Society/ Credit Union/Automatic Bank	43	0.7
Betting Office	40	0.7
Advertising Station	32	0.6
Other	408	7.2
Total	5,697	100

Data Source: South Dublin County Council

[91] The rates categories cover a wide range of activities such as health centre, beauty/hair salon, community centre, day centre, heritage centre, hotel, graveyard, kennels, automatic bank, fire station, garage/filling station, crèche, laboratory etc.

Two broad categories stand out as particularly important: the warehousing category[92] and office-based activities.[93] The warehousing category accounted for 34% of all rateable accounts in 2004, while the office category accounted for 17.9%. Other important categories were the shop/supermarket category, which reflects the importance of the retail sector[94] of the economy, and the workshop and factory categories. The majority of the remaining rate accounts related to locally traded services such as restaurants, surgery/health centres, childcare facilities and hair and beauty salons.

Table 5.6 provides a breakdown of the geographical distribution of the two main activities, warehousing and office activities, within the county.

Table 5.6 Distribution of Warehousing and Office Activities in South Dublin County

Geographic Area	Number of Warehouses	% Total Warehousing	Number of Offices	% Total Offices
Clondalkin	801	41.4%	352	34.4%
Lucan	62	3.2%	91	8.9%
Palmerstown	96	5.0%	50	4.9%
Tallaght	672	34.7%	281	27.5%
Firhouse	4	0.2%	16	1.6%
Rathfarnham	17	0.8%	69	6.8%
Templeogue	6	0.3%	36	3.5%
Terenure	81	4.2%	50	4.9%
Other:	198	10.2%	77	7.5%
Total	1937	100%	1022	100%

Data Source: South Dublin County Council

92 This was taken to include all rates that came under the headings of warehouse/warerooms, office warehouse/warerooms, stores, store yards, store land, warerooms, factory store grounds and office warerooms.

93 The office category was taken to include all activities that had the term ‘office’ but excluded those that also had warehouse or store in the title e.g. the offices warehouse and offices store categories were excluded (as these were included under the warehousing category). Included within the office category were: offices factory grounds, offices apartment, house post office, office printing works, office restaurant, office telephone exchange etc.

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Two areas, Tallaght and Clondalkin, account for the majority warehousing/distribution and office activities. Combined these two locations account for 76.1% of warehousing-type activities and 61.9% of offices. It must be noted however, that these areas are quite extensive; Tallaght accounts for 13 of the 49 electoral divisions within the county and Clondalkin accounts for seven. A number of key industrial estates including Park West, Ballymount, Cookstown, Clondalkin Industrial Estate, Nangor Road, and Whitestown, are also located within these areas.

Under the 'other' category in table 5.6, which includes the semi-rural areas of the county, Newcastle accounted for the majority of warehousing and office facilities. Newcastle, which is located South West of Lucan, accounted for 166 warehouses (out of 198) and 32 offices (out of 151). The growth of Newcastle as a peripheral site for warehousing and distribution activities reflects the diffusion of economic activities from urban locations into the outer suburbs. With continued economic growth and increasing pressures for space in prime locations, it is likely that warehousing and distribution activities will shift to more peripheral areas, leaving space for more labour-intensive, high-value added service activities in central locations.[95]

5.6 The Geography of Production: Kompass Information on the Economy of South Dublin County

In 2004, there were an estimated 6,377 businesses located in the county.[96] This figure is based on information supplied by Kompass. The Kompass Directory is a directory of all

[95] There is evidence to suggest that this is already occurring. Refer to earlier discussions in section 1.4.1, p. 8.

[96] These are not necessarily limited companies; they may involve just one person providing a good or service (such as plumbing, web design and market research) and the total of 6,377 includes schools, hospitals, and public service activities. The number of firms in the County differs from the number of rateable accounts (5,697) because schools,

businesses operating in Ireland and provides information on factors such as company location, sector of activity and nationality of ownership. The Kompass database is useful as a source of information on (i) the number of firms in the county (ii) the breakdown of firms by geographical area (iii) the breakdown of firms by industrial estate/business park, and (iv) the sectoral breakdown of economic activities within the county.

5.6.1 The Spatial Distribution of Businesses by Postal District

An analysis of the geographic distribution of businesses in South Dublin County by Postal District is presented in table 5.7. Kompass classify firms based on postal codes, however, since the county boundaries do not coincide exactly with postal code districts, it was necessary to identify areas where the boundaries of the county extend into other postal districts and eliminate any firms that were not part of the county. The postal code areas of Dublin 12, Dublin 16, Dublin 14, Dublin 20, Dublin 6W and South Dublin County, had to be filtered in order to capture only those firms that fall within the 49 electoral divisions of South Dublin County.

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hospitals, charitable organisations and some public service activities are exempt from paying rates.

Table 5.7 Geographic Distribution of Businesses in South Dublin County

Area	Postal District	No. of Businesses	% of Total Firms
Tallaght[97]	**Dublin 24**	**1,763**	**27.65**
Clondalkin/Naas Road[98]	**Dublin 22, 12**	**2,777**	**43.55**
Palmerstown[99]	**Dublin 20, 10**	**272**	**4.27**
Rathfarnham, Terenure, Templeogue, Edmondstown	**Dublin 16, 14**	**1,039**	**16.29**
South Dublin County	**County Dublin**	**526**	**8.25**
• Lucan	County Dublin	253	3.97
• Newcastle	County Dublin	49	0.77
• Rathcoole	County Dublin	173	2.71
• Saggart	County Dublin	46	0.72
• Other	County Dublin	5	0.08
	Total	**6,377**	**100.00**

Source: Derived from Kompass data

Over seven tenths of all businesses in the county (71.2%) are located in the areas of Clondalkin and Tallaght. Four other areas (Rathfarnham, Terenure, Templeogue, and Edmondstown) account for 16.29%, and 8.25% of businesses are located in the County Dublin postal area. Lucan (3.97%) and Rathcoole (2.71%) account for the majority of businesses in the County Dublin postal district.

5.6.2 The Geographical Location of Business Parks and Industrial Estates

Table 5.8 provides a geographical breakdown of the business parks and industrial estates located in the county. The distinction between an industrial estate and a business park is a tentative one. In practice most new industrial areas classify themselves as business parks. The term industrial estate is associated with 'old' industry whereas the business park nomenclature suggests a predominance of office-based activities and a higher

[97] Tallaght includes part of Firhouse (which is split between the Dublin 24 and Dublin 16 Postal Districts).
[98] Walkinstown is included in the Clondalkin area.
[99] The County boundary extends into Upper Ballyfermot. This area includes the Cherry Orchard Industrial Estate.

quality working environment.[100] In 2004, there were 39 industrial estates and 46 business parks in the county; together these accounted for a total of 2,241 (or 31%) of all businesses located in South Dublin County.

Table 5.8 Geographic Distribution of Business Parks and Industrial Estates

Geographic Area	No. of Industrial Estates	No. of Businesses in Industrial Estates	No. of Business Parks	No. of Businesses in Business Parks	Total No. of Businesses in Industrial Areas
Clondalkin/Naas Rd.	18	614	15	330	944
Ballymount/Walkinstown[101]	9	277	13	212	489
Lucan	2	19	-	-	19
Palmerstown[102]	1	72	1	6	78
Tallaght	7	231	14	354	585
Templeogue	1	13	-	-	13
Baldonnel	-	-	1	23	23
Rathcoole	1	86	2	4	90
Total	**39**	**1,312**	**46**	**929**	**2241**

Source: Derived from Kompass data

Three areas (Clondalkin/Naas Rd., Ballymount/Walkinstown and Tallaght) accounted for approximately 90% of business parks and industrial estates. In terms of companies, Clondalkin/Naas Rd. accounted for 42% of businesses, Tallaght for 26% and Ballymount/Walkinstown for 22%. The Walkinstown category encompasses business that fall within the Dublin 12 postal district - this includes parts of the Clondalkin-Monastery, Clondalkin-Ballymount, Tallaght-Kilnamanagh and Terenure electoral divisions. A detailed breakdown of the business parks and industrial estates of the county by geographical area and number of businesses, is presented in the appendices.[103]

[100] This is true in a lot of cases. The need to invest in the renewal of industrial estates within the county is highlighted in *South Dublin: a place for people* (2002, p.35).
[101] The Ashleaf Business Centre, Crumlin is included in this category.
[102] The Palmerstown area includes the Cherry Orchard Industrial Estate, Ballyfermot.
[103] Refer to Appendix F.

5.7 Employment and Job Creation in the County

From an economic and planning perspective, the relationship between the number of jobs available and the number of workers (i.e. the resident labour force) is important. A useful statistic in this regard is the 'Jobs Ratio'. The Jobs Ratio is the total number of jobs available divided by the labour force. Using data from the 2002 Census on the labour force and DTO data on the number of jobs, [104] table 5.9 shows the Jobs Ratio for the Greater Dublin Area.

Table 5.9 Jobs Ratios for the Greater Dublin Area

Local Authority Area	Number of Jobs	Labour Force	Jobs Ratio
Dublin City	393,221	250,330	1.62
Dun Laoghaire-Rathdown	77,471	86,896	0.87
Fingal	68,477	98,448	0.69
South Dublin County	85,683	119,632	0.72
Co. Kildare	54,271	79,220	0.67
Co. Meath	31,272	63,134	0.49
Co. Wicklow	30,615	52,016	0.59
Greater Dublin Area	741,000	749,676	0.99

Source: Labour Force Data from 2002 Census and Jobs data from DTO

Dublin City records the highest Jobs Ratio, with 162 jobs available for every 100 workers. The lowest is County Meath, with only 49 jobs available for every 100 workers. The Jobs Ratio for South Dublin in 2002 was .72. This reflects recent job creation and the recent decline in unemployment due to high levels of growth in the economy. Although very little research has been undertaken on this issue, it is suggested that the jobs ratio should not fall below 0.7; a ratio below 0.7 would be considered unsustainable. This is because any imbalance between the number of jobs available and the labour force

[104] Data on the number of jobs available in the different local authority areas was compiled by the Dublin Transport Office based on information derived from a number of sources. A key source of information was the 2002 Census, which provided confidential information related to where people lived and where they worked and how far they travelled to work. This information was combined with information from a travel survey carried out by the Dublin Transport Office, and information from Kompass (and other sources) on the geographical concentration of firms and employment in industrial estates and business parks within the Greater Dublin Area.

in a particular locality is reflected in a high level of commuting - if jobs are not available locally, workers will have to travel elsewhere.

5.7.1 Employment Forecasts for South Dublin County

In order to estimate the challenge for South Dublin County in terms of net job creation, table 5.10 outlines two possible growth scenarios based on forecasts of population growth over the period 2002 – 2010. As outlined (p. 44) the size of the labour force is influenced by the size of the population and changes in the labour force participation rate. Based on a low population growth scenario, Atkins (2004) predicts an increase in the labour force in South Dublin County of 10,157 over the period 2002-2010.[105] To maintain a constant jobs ratio of 0.72, Atkins (2004) calculates that the number of jobs would have to increase from 85,683 to 93,448, a net increase of 7,765 jobs. This would require an annual percentage increase in the number of jobs available (i.e. employment growth) of just over one per cent.

Table 5.10 Employment Forecasts for South Dublin County 2010

Scenario 1: Low Projection			
	Labour Force	**Jobs**	**Jobs Ratio**
2002	119,632	85,683	0.72
2010	129,789	93,448	0.72
Change 2002-2010	+10,157	+7,765	
% change	+8.49%	+9.06%	
Annual rate of Growth	+1.02%	+1.09	

Scenario 2: High Projection			
	Labour Force	**Jobs**	**Jobs Ratio**
2002	119,632	85,683	0.72
2010	136,466	98,255	0.72
Change 2002-2010	+16,834	+12,572	
% change	+14.07%	+14.67%	
Annual rate of Growth	+1.66%	+1.73	

105 Atkins, 2004. *Regional Planning Guidelines for the Greater Dublin Area 2004 – 2016*. Table 6.9, p. 119, jobs growth scenario for the Greater Dublin Area.

However, based on recent population trends in South Dublin County, an alternative high population growth scenario is presented.[106] If we assume that over the period 2002-2010 the population of the county > 15 years increases by 10% and the participation rate increases from 64.6 to 67.0,[107] then the projected growth of the labour force would be 16,834 persons - an increase of 14.07%, from 119,632 to 136,466. If the jobs ratio is to remain constant, this would require that the number of jobs increase from 85,683 to 98,255, an increase of 14.67%. From the perspective of job creation, an annual rate of increase of 1.73% in the number of jobs would be needed, if the balance between the number of jobs available in the county and the labour force is to be maintained.

5.8 New Enterprise Development

The final part of this section on the economy of South Dublin County examines new enterprise development. An important indicator of the vibrancy of a local economy is the number of enterprise start-ups. Although many start-up companies do not receive agency support the majority do and enterprise centres play a very important role in their development. In South Dublin County, there are a number of organisations focused on the development of enterprise: (i) South Dublin County Council, (ii) the South Dublin County Enterprise Board, (iii) Partas, (iv) Enterprise Action, (v) Lucan 2000, (vi) the Rural Enterprise Development (RED) Programme, and (vii) the M50 Enterprise Programme. Over the period 2001-2003, these organisations supported the

[106] The high growth scenario presented in table 5.10 is still conservative. The population of South Dublin County grew by 9.2% over the period 1996-2002, an average annual increase of 1.48%. The labour force increased by 22.8% over the same period. If the same rates of growth were to continue to 2010, this would amount to an increase in population of 12.47% and an increase in the labour force of 31.42%.

[107] Due largely to the increase in the female participation rate. Refer to table 4.2, p. 44.

establishment of 647 new enterprises.[108] Before examining the number and distribution of start-ups by sector, the next section gives a brief outline of the role of South Dublin County Council and the different local enterprise centres in local enterprise development.

5.8.1 South Dublin County Council

Much of the built infrastructure and facilities necessary for local enterprise centres to operate has been provided by the South Dublin County Council. Since 1994, the Council has supported the development of local enterprise centres in Bawnogue, Neilstown, Killinarden and Brookfield. These centres were built on sites provided by South Dublin County Council and the Council has co-ordinated their development, in each case leading a development group comprising representatives of Enterprise Ireland and local development organisations, the Area Based Partnerships and the County Enterprise Board. The function of enterprise centres is to facilitate the provision of low-cost small-scale incubator workshop and training space for new light industrial, commercial and craft enterprises.[109] The centres are leased by South Dublin County Council to local enterprise organisations such as *Partas* and *Enterprise Action*, which manage the centres and provide enterprise support at local level.

5.8.2 The South Dublin County Enterprise Board (CEB)

The South Dublin CEB is one of 35 county enterprise boards funded under the National Development Plan (2000-2006) and is a lead organisation in the development of local enterprise in the county.[110] The Board is regulated by the Department of Enterprise,

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[108] Although some of these may be characterised more as labour market-type interventions rather than company start-ups per se. This is elaborated in section 5.8.7 and 5.8.8.

[109] Refer to section 2.3.9 of the *South Dublin County Council County Development Plan 2004-2012*.

[110] The CEB supports the activities of some of the other local enterprise organisations, including Partas, Enterprise Action, and Lucan 2000. The Board is funded by the Irish Government and part-funded by the EU Structural Funds under the National Development Plan, 2000-2006.

Trade and Employment, and its stated objective is to develop and support local entrepreneurship and enterprise and to stimulate the creation of employment within the county. The Board provides training and education to entrepreneurs, with a particular focus on management development training. It also facilitates the expansion of already existing small firms. All of the CEBs client companies are indigenous firms. Since 1998, constraints on the Board's activities require that the CEB focus support on micro-enterprises (firms with less than ten employees). Enterprises must be either manufacturing or service companies that have potential to be internationally trading. Along with start-up courses, the CEB provides short training programmes and seminars for people who are already operating a business, in areas such as financial management, marketing, sales, e-commerce, ICT and human resource management.

5.8.3 Partas

Partas, formerly known as *Get Tallaght Working*, was established in the 1970s and is the oldest enterprise support organisation in the county. All of the other agencies were established after 1990.[111] It is a community and voluntary based co-operative, which developed in the 1970s during a period of high unemployment. Partas now run four local enterprise centres in Tallaght (at Brookfield, Bolbrook, Killinarden, and Old Bawn), which promote industry and entrepreneurial skills within the Tallaght area. These centres provide incubator units to entrepreneurs as well as training, advice and other business services.[112]

[111] The CEB was established in 1993, Enterprise Action in 1996; Lucan 2000 in 1996, Rural Leader II in 1994; and the M50 Enterprise Programme in 2000.

[112] Partas run up to 12 courses twice a year, with between 8 and 10 participants, and provides individual mentoring advice services to already existing companies in the area.

5.8.4 Enterprise Action

Enterprise Action run two enterprise centres in Clondalkin, one at Neilstown (established in 1998) and the other at Bawnogue (opened in 2003). Both are supported by the South Dublin County Enterprise Board. Like Partas, Enterprise Action is aimed at encouraging local development through the provision of low cost incubation space and enterprise training. The Bawnogue Enterprise Centre has 44 enterprise units that provide incubation space for a variety of trades and service enterprises, including hairdressing, computer repairs, book-keeping services, crèche and catering services. Although Enterprise Actions' clients are diverse, a key focus of the organisations activities is the *Back to Work Enterprise Programme*,[113] which offers various enterprise supports designed to encourage individuals to move from unemployment to employment.

5.8.5 Lucan 2000

Lucan 2000 is located in Lucan village and was set up under the *Local Development Social Inclusion Programme* (funded under the NDP). It was established in 1996 to encourage local community and enterprise development in the Lucan and Palmerstown areas. In 1998 the enterprise section of Lucan 2000 came into operation. The organisation has a number of training room facilities and offers support and advice to potential entrepreneurs. Enterprise funding is obtained from various sources including the South Dublin County Enterprise Board; the Department of Enterprise, Trade and Employment; the Department of Social and Family Affairs; and Area Development Management Ltd.[114] Although Lucan 2000 pays particular attention to social and community based projects and a large number of its clients are from among the target groups of the unemployed, the type of start-ups supported by Lucan 2000 are quite

[113] This scheme was established by the *Department of Social and Family* Affairs and is discussed further in section 5.8.7.

[114] Area Development Management Ltd. is an intermediary company established in 1992 by the Irish Government in agreement with the European Commission. ADM's remit is to support integrated local economic and social development through managing programmes and administering EU funds targeted at countering disadvantage and exclusion.

diverse, ranging from software and multimedia design to childcare facilities and contract cleaning. A total of 64 start-up enterprises were supported over the period 2001-2003.[115]

5.8.6 The M50 Enterprise Platform Programme (EPP)

The focus of the M50 Enterprise Platform Programme is high potential knowledge-based start-ups (HPSUs). Enterprise Ireland define a HPSU as a company which is based on technological innovation, led by an experienced team with a mixture of technical and commercial competencies, export oriented and likely to achieve significant employment and sales growth within a three-year period. Participants on the M50 Programme are graduates and the programme targets high-calibre individuals with extensive business experience in indigenous and/or multinational corporations. The Programme was established in 2000 by the Institute of Technology Tallaght, the Institute of Technology Blanchardstown and Dublin City University (DCU). In 2003, University College Dublin (UCD) joined the partnership between these three academic institutions.

In addition to training, business coaching and mentoring, the M50 Programme provides financial support and incubation facilities to entrepreneurs over a twelve-month time-span. After the M50 programme finishes, participants may be referred to the County Enterprise Board for further assistance during their initial start-up phase. Funding is obtained from Enterprise Ireland and the Department of Education. Incubation facilities are provided at the Institute of Technology in Tallaght, the Institute of Technology, Blanchardstown, at UCD's new *Innovation and Technology Transfer Centre (Nova UCD*) or at DCUs new state of the art Innovation and Enterprise Centre, *DCU Invent*. These centres provide high-potential start-ups with the high quality working environment that they need, with broadband facilities and various other business support services. Participants can choose whichever location is appropriate for their business and can benefit from interaction with third level researchers and research facilities.

[115] Eight of these were supported jointly by the CEB and Lucan 2000.

Over the period 2001 to 2003, the M50 programme supported an average of ten start-up companies per year (31 companies in total). In 2004, the number of start-up companies increased to 20. The majority of the M50 enterprise programme start-ups are in the areas of software and telecoms,[116] multimedia, management consultancy and training, and the environment. A key objective of the M50 programme is to commercialise the results of R&D in the third level sector and to promote synergies between academia and industry.

5.8.7 The Rural Enterprise Development (RED) Programme

The Rural Enterprise Development (RED) Programme is an initiative of the Rural Dublin Leader Company Ltd., which is a local development organisation with responsibility for delivering a number of national and EU programmes and initiatives in the rural areas of the counties of Fingal, South Dublin County and Dun Laoghaire/Rathdown. Five areas of South Dublin County fall within the remit of Rural Dublin Leader: Saggart, Rathcoole, Newcastle, Brittas and Glenasmole. Since 2002, Rural Dublin Leader has funded 13 training projects, three feasibility studies and three projects to enhance the social and cultural environment of local communities in these areas. Under the Rural Enterprise Development Programme (RED), which was established in 2000, six start-up enterprises in South Dublin County have been supported: two in rural tourism, two craft-based enterprises, and two service companies. With the decline of agriculture, the rural parts of the county are undergoing considerable change and diversification into services, such as tourism and leisure activities, offer viable alternatives to sustain the development of rural communities in these areas.

5.8.8 Enterprise Start-Ups 2001-2003

Table 5.11 provides a breakdown of the number of start-up enterprises supported by each of the agencies over the period 2001-2003. In practice, participants in one enterprise programme (e.g. Partas), may receive funding from another agency (e.g. the County Enterprise Board), therefore to arrive at a correct figure of the number of start-up

[116] Of the 51 start-up companies to date, 24 are in the software and telecoms category.

companies, information from the different agencies was examined and cross-checked against each other to eliminate any duplication that would result in an overestimate of the total number of start-ups. As table 5.11 illustrates, some start-ups are supported jointly by the CEB and Partas/Enterprise Action/Lucan 2000.

It is important to note that the figures in table 5.11 do not include the ongoing training and support given to firms as they develop and expand their companies. Neither does it capture the support given to potential start-ups that may not materialise, or the provision of workspace to businesses already in operation. (Local enterprise centres may assist clients by providing them with workspace even though they may not have assisted them in starting up their business). Additionally, there is frequently a time lag between participation in an enterprise programme and eventual start-up, and companies that start up only after a significant time period has elapsed, may not be recorded in agency statistics.

Table 5.11 Number of Agency-Supported Start-up Companies 2001-2003

Enterprise Agency	**2001**	**2002**	**2003**	**Total**
County Enterprise Board (CEB)	9	5	19	33
CEB and Partas	15	4	6	25
Partas	135	112	81	328
CEB and Enterprise Action	2	3	3	8
Enterprise Action	77	48	27	152
CEB and Lucan 2000	4	4	10	18
Lucan 2000	13	27	6	46
Rural Leader Programme	-	-	6	6
M50 Enterprise Programme	10	10	11	31
Total Number of Start-ups	265	214	167	647

Table 5.11 shows that over the three year period 2001-2003, local enterprise centres supported a total of 647 start-ups. Of these, Enterprise Action and Partas accounted for

512 (including those jointly supported with the CEB), representing almost 80% of the total. A large percentage of projects supported by these two organisations are funded under the *Back to Work Enterprise Programme*, which targets the long-term unemployed.[117]

The decline in the number of start-ups for Partas and Enterprise Action in 2003 reflects changes in funding. The *Back to Work Enterprise Allowance* was established in March 1999 to encourage the long term unemployed to take up self employment opportunities. Under the Programme, a person continues to receive a percentage of their unemployment benefit (plus any secondary benefits) during the first four years of start-up, declining from 100% in the first year, to 75%, 50% and 25% in the subsequent years. To avail of funding under the *Back to Work Enterprise Allowance* measure, applicants (prior to January 2003) had to be unemployed for at least 12 months. In January 2003, this was increased to 5 years and this substantially reduced the number of applicants eligible for support in 2003. Given the negative impact of this change, in March 2004, the qualifying period was reduced from 5 to 3 years. Although this is an improvement it is still substantially higher than the original one year qualifying period and is likely to impact on the activities of both organisations over the coming years.

While the majority of start-ups supported by Partas and Enterprise Action are funded under various social inclusion programmes, the type of projects funded by the CEB fall into a different category - they are more economic than social. The CEB receives most of its funding from the Department of Enterprise, Trade and Employment. In 2003, as part of a wider policy trend at central government level to encourage the CEBs to move towards refundable forms of assistance, the CEBs budget was reduced by 16% and by a further 14% in 2004. Despite this decrease in central government funding, the South Dublin CEB was able to increase its funding in 2003, based on repayments from start-up

[117]This scheme was extended in the late 1990s to include (in addition to unemployed persons), people receiving other forms of social welfare such as a disability or carers allowance, and those in receipt of a one-parent family payment.

companies previously supported by the Board.[118] In addition to financial assistance in the form of capital grants and/or preference scheme investment funding, as of 2004, any employment grants received by the CEB will also be repayable. This means that approximately 90% of financial assistance provided by the CEB will be repayable.

5.8.9 Start-up Companies by Area of Activity/Sector.

Table 5.12 below provides a breakdown of start-up companies by area of activity/sector, using the NACE code classification.

[118] While start-ups are granted a reprieve during their first year of their operation, they are expected to repay the CEB over the following 4 years.

Table 5.12 Start-up Companies by Area of Activity/Sector

Sector of Activity	CEB	CEB and Other	EA	Lucan 2000	Partas	M50 EPP	RED	Total
Agriculture								
1 Horticulture (Nursery)					1			1
Manufacturing:								
15 Food	1	1	8		7			17
17-18 Clothing, Textiles, crafts	3	5	-	5	1	1	2	17
27-29 Metals & Engineering:	2	5	-					7
21-22 Printing and Publishing	0	3	3	2	2			10
37 Recycling	0	0	1	2				3
45 Construction, including special trades, plastering, painting etc.	1	1	46	4	62	2		116
Other manufacturing	2	5	4		16			27
Services:	-	-						
50-52 Wholesale, Retail and Repair Activities	1	4	10	1	29			45
55 Hotels, restaurants, café, catering				3				3
60 Taxi/Hackney service	-	-	25	2	49			76
64 Courier/Messaging Service			10	1	18			29
72 Software and Telecoms	7	2	5	2	28	13		57
74 Other business Activities: Training, Consultancy, Video, Advertising	8	7	12	9	54	13	1	104
80 Education: driving schools, childcare, Montessori	4	10	1	8	7	1	1	32
85 Health and social work	-	-	2	2	1			5
92 Recreational, cultural and sporting/health activities	2	3	21		25	1	2	54
93 Other service activities: beauty salon, hairdressing etc.	2	5	4	5	28			44
	33	51	152	46	328	31	6	647

The majority of start-ups over the 2001-2003 period were in the construction sector (116), the taxi/hackney category (76) and the other business activities sector (104). The distribution of start-ups by sector reflects the high percentage of businesses accounted for by Partas and Enterprise Action i.e. the people who have become self-employed in areas such as painting, plastering and flooring (construction-related activities), as well as those providing taxi/hackney services (76) and courier services (29). Start-ups from the M50

EPP and the CEB are concentrated in the areas of software and telecoms and training and consultancy - services that have the potential to generate employment and to become internationally traded.

A detailed analysis of the costs and benefits of start-up companies (from the point of view of investment of public funds) is not possible within the confines of the present study. However, it is clear from the preceding analysis that local enterprise centres have exerted a positive influence on entrepreneurial activities within the county and supported social as well as economic development. They have contributed to the development of an entrepreneurial culture at local level and helped to alleviate problems of unemployment in disadvantaged areas.

5.8.10 Development Proposals

While the needs of large firms (both indigenous and foreign) as well as the SME sector are well catered for, [119] there appears to be a shortage of subsidised workspace for the needs of the start-up micro-enterprise and self-employment sector.[120] To meet this need, the South Dublin County Development Board has identified a number of areas where further enterprise centres could be provided (including the areas of Lucan and Adamstown). The Board also recommends that provision be made for micro-enterprises in the SME area of the Grange Castle Business Park. Aside from these proposals, a development now underway to increase facilities for start-up companies is the construction of an on-campus incubation centre at the Institute of Technology, Tallaght. The Institute's Synergy Technology Incubation Centre, which is due for completion in

[119] A number of commercial organisations such as Growcorp in Citwest and Greenogue in Rathcoole provide accommodation for the SME sector. Growcorp offers highly serviced medium to large units and more sophisticated support services to companies on commercial terms. Greenogue Business Park, which is located on the Newcastle Road, midway between Rathcoole and Newcastle village, provides mostly workshop based accommodation for manufacturers/distributors and service companies.

[120] This view is expressed in a report submitted to South Dublin County Council, entitled *County Development Plan Submission by "An Economically Competitive Place Implementation and Monitoring Group"* (2003).

2005, will provide 1,000m^2 of incubation space, comprising 16 modular enterprise units with desk space for 12 embryo enterprises. It will also provide industrial research space for research and development collaborations between the Institute and Industry.

5.9 Economic Development Policy

The successful intertwining of organisations and institutions is critical for the rapid diffusion of new technologies and the successful performance of the firms and industries. In South Dublin County, high levels of government support and extensive linkages between innovative firms and institutions (including educational institutions) have brought considerable benefits to the region. In terms of institutional support, the two state agencies, IDA Ireland and Enterprise Ireland, provide a variety of assistance to companies in the form of advice, management development programmes, and research and development. These two organisations provide an important interface between national firms and technology suppliers and institutes abroad. The state agencies also play a role in fostering co-operation among enterprises and enhancing the ability of enterprises to absorb technology from abroad.

While IDA Ireland and Enteprise Ireland are the hub of industry support-related activities in Dublin (and in the Irish economy generally), the promotion of industry in the county is also facilitated by a wide variety of local institutions and training organisations, including the South Dublin Chamber of Commerce, the South Dublin County Enterprise Board, South Dublin County Council, FÁS and a number of local enterprise centres in Neilstown, Brookfield, Bolbrook, Oldbawn, Killinarden and Bawnogue. Most of these local enterprise centres are publicly owned and are managed by community enterprise support organisations such as Partas (4 centres) and Enterprise Action (2 centres) and have been very successful in economic development terms. They provide start-up workspace at low cost, with preference in allocation usually given to residents of the immediate locality.

The South Dublin Chamber of Commerce is also a proactive, development-oriented body, focused on the promotion of investment in the local economy. The Chamber is the largest business organisation in the County and is the Social Partner for Business. It has the biggest *Schools Business Partnership* in the country and assists development through a variety of services to businesses, including export documentation service on behalf of the Department of Enterprise, Trade and Employment; training; seminar; and research and networking. The Chamber's *Economic Development Strategy for South Dublin 2000-2016*, published in June 2001, provides a comprehensive overview of the strategic changes and investments required for the successful growth and development of the local economy.

5.9.1 The Institutional Support Infrastructure

Nelson (1993) and others have argued that institutions are subject to incremental (and radical) changes - but also to 'institutional lags'. This can occur when institutions and support organisations do not respond quickly enough to the technological, organisational and market changes that arise within industry. Within South Dublin County, local institutions have played a key role in fostering economic development. This is reflected in the adaptation of the system of education and training to the needs of industry (as reflected in developments at the Institute of Technology, Tallaght); in the evolution of the technological and physical infrastructures; and in the expansion of the role of institutions such as the Trade Board, which has accompanied the globalisation of the industry. Conditions in the domestic economy are conducive to wealth creation and economic growth. The economy has one of the world's most pro-business environments, especially for foreign investment. Ireland's policy framework promotes an open and competitive business environment. The *2004 Index of Economic Freedom*, compiled by the Wall Street Journal and The Heritage Foundation, ranked Ireland fifth out of 155 countries in terms of economic freedom, categorizing Ireland as a 'free' economy.

IDA Ireland offer considerable support to potential investors. The IDA support scheme is flexible and a variety of grants are available which can be tailored to meet the specific needs of companies. Grant levels are determined by negotiation and grant payments are structured in a way that best suits the financing requirements of the company. An important part of the incentive package offered by IDA is the availability of grants towards initial start-up costs; these cash grants are, in principle, non-repayable provided certain conditions are fulfilled. Fixed assets eligible for assistance include site purchase and development, buildings and new plant and equipment. Employment grants are specifically geared to companies that create employment but do not need to invest heavily in fixed assets; these grants are non-taxable. Grants are also available towards the costs of major training initiatives in established companies that substantially upgrade their skill bases. R&D capability is promoted through the provision of grants for the development and substantial expansion of R&D facilities. Feasibility studies and technology acquisition are also covered under the R&D grant scheme.

5.9.2 The Regulatory Environment

According to the Economist Intelligence Unit, *Business Environment Rankings*, Ireland will remain one of the most attractive business locations in the world throughout the period 2004-2008. The economy is characterized by (i) a stable macroeconomic environment (ii) competition (iii) flexible labour markets and (iv) adequate social protection.

Since 1987, national pay agreements between employees, employers and government have played a central role in keeping inflation under control and promoting wage moderation. The current agreement, *Sustaining Progress*, is the sixth successive national pay agreement and seeks as its primary goal the objective of maintaining a competitive economy in order to provide a strong basis for further economic prosperity.

The standard rate of corporation tax in Ireland for trading profits is 12.5%; this is the lowest rate of corporation tax in Europe. There are no provincial, municipal or local taxes on the profits of companies. The only local tax is a property tax, referred to as ‘rates’, levied by Local Authorities on commercial properties.[121] Exports are exempt from VAT (value-added-tax) and companies that export 75% of their output can apply to the Revenue Commissioners for authorisation to receive almost all of their goods and services from Irish and foreign suppliers free from any VAT charge. This reduces administration and the need to get a refund of VAT. Membership of the EU also allows for the free movement of goods, services, capital and labour within the EU, and the elimination of customs and excise duties. Although customs and excise duties are imposed on imports from outside the EU, approval may be obtained to import goods duty-free from outside the EU for processing and re-exportation to non-EU countries. Businesses can also obtain approval to store goods duty free on their premises until required.

Recent changes in the 2004 Finance Bill are indicative of the economy’s pro-business environment. In the 2004 Finance Bill, the 9% tax charged on the transfer of intellectual property was abolished, thereby encouraging companies to carry out R&D and/or manage intellectual property in Ireland. An R&D tax credit for incremental expenditure by companies was also introduced - up to 20% of incremental expenditure can be set against corporation tax in any given tax year. The disposal of subsidiary companies is now exempt from capital gains tax and the scope of Ireland’s double taxation relief provisions for dividend income paid to parent companies was expanded. All of these changes reflect the overriding goal of Irish economic policy, which is to promote a thriving, internationally competitive economy by providing incentives rather than disincentives to the generation of wealth. This is accompanied by a policy of social inclusion in the labour market. A key objective of Irish economic policy is to allow every one to participate and benefit from economic growth. Improving the employment prospects and the ‘human capital’ of the labour force through investment in education and training is a key policy instrument used to achieve this goal.

[121] An amount, or rate, is payable per €1 valuation of the property. The rate is set annually by each Local Authority, which also determines the valuation of the property.

Part 6. Governance

6.1.1 The System of Local Governance

Just as infrastructural deficits can result in regional disparities between different localities, developments within a region also depend upon the abilities of local institutions and organisations to shape the development process. In South Dublin County, a wide variety of institutions, organisations and development agencies act as catalysts in shaping the patterns and processes of social, cultural and economic development within the county. Local government is implemented through South Dublin County Council, which is the political forum of South Dublin County. The County Council is both a service provider and enabler and an elected political institution. The 26 democratically elected Council Members work with the County Manager who is assisted by the Management team.[122] The County Manager is the Chief Executive Officer of the Council and reports to the elected representatives. The Councillors' role is to approve the policies supporting the functions of the County Council in the same way that a Board of Directors acts for a private company. The County Manager then implements these policies. For the purposes of day-to-day management, the County Council is organised into Departments (e.g. Transportation, Planning, Housing etc.) that are sub-divided into sections.

[122] An overview of the political and senior management structure of South Dublin County Council is provided in Appendix II (p.56) of South Dublin County Council's Corporate Plan, *Managing the Future 2001-2006 (2001).*

6.1.2 South Dublin County Council: Role and Responsibilities

As a Local Authority, the Council has the legislative authority to provide local services in its defined administrative area. The Council provides an extensive range of services and has responsibility for a wide number of activities, including: planning and development; house building and estate management; environmental protection; roads, transportation and safety; water supply and waste management; sport, recreation and community development; arts, culture and education; the development and maintenance of parks and amenities, and libraries.[123] The Economic Development Department and the Planning Department play an important role in local economic development through their various activities, which include land use zoning and forward planning, land acquisition and land disposal for the provision of industrial and commercial sites, identifying the key infrastructure necessary to attract foreign direct investment, and through the *County Development Plan* which includes strong pro-business strategies. The responsibilities of the Roads and Tranportation Department include the planning, design and construction of new roads and motorways, the maintenance and upkeep of the existing road network, and the provision of public lighting and traffic management.

Table 6.1 below provides an outline of some of the key functions and services provided by South Dublin County Council, under the headings of (i) Planning (ii) Economic Development (iii) Housing (iv) Roads, Transportation and Safety (v) Water and Environmental Services, and (vi) Community.[124]

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[123] A more detailed account of the responsibilities, functions and activities of South Dublin County Council is provided in Appendix 1 (p.54) of South Dublin County Council's Corporate Plan, *Managing the Future 2001-2006 (2001).*

[124] South Dublin County Council's *Corporate Plan 2001-2006* set out the guiding principles and key objectives underlying the Council's strategy as a service provider up to 2006. These aims and objectives were reviewed and developed under six broad themes: (i) Local Democracy and Elected Members (ii) Caring for What We Hold in Trust (iii) Maximising Social Inclusion (iv) Serving the Needs of a Developing County (v) Effectively Managing Our Resources and (vi) Services Provision. A new plan will be adopted for 2005-2009. The elected members of South Dublin County Council at a special meeting on 18th February 2005 adopted the Corporate Plan 2004 to 2009,

Table 6.1 South Dublin County Council: Key Functions and Services

Planning	• Forward Planning • Land use zoning • Development Control • Planning Enforcement • Land acquisition and land disposal • The Integrated Area Plans
Economic Development	• The provision of sites for development • The promotion of inward investment The development of enterprise in disadvantaged areas • The promotion (in co-operation with other agencies) of economic development, including tourism, within South Dublin County • Supporting infrastructure provision
Housing Development	• Provision and management of social housing • Maintenance and refurbishment of the Council's existing housing stock • Promote the 'Shared Ownership' and 'Affordable Housing' schemes • Set standards to ensure the supply of good quality, affordable accommodation • Provision of accommodation and support (in co-operation with other agencies) for travellers, the homeless and others with special needs • Partnership with other agencies including education providers and the Garda Siochána in combating anti-social behaviour
Roads, Transportation and Safety	• Design and construction of new roads • Development and maintenance of existing road network • Development and implementation of an integrated transportation strategy • Provision of public lighting • Traffic management and road safety policy • Parking and signposting
Water and Environmental Services	• Provision and maintenance of water supply, drainage and sewerage infrastructure • Waste management, including refuse collection, landfill and recycling • Control of litter and pollution • Provision of a fire service

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Connecting with Communities. The new Corporate Plan sets out the key issues facing the Council and its strategy to advance and guide its operations into the future.

Community Services	• Management of parks, open spaces and landscapes • Provision and management of playing fields for soccer, Gaelic football and other sports, • Provision of playgrounds and tennis courts • Library service • Civic theatre • Arts Development • Promotion of Irish language and culture • Provision and management of community, sports and youth centres • The targeting of resources to disadvantaged communities to combat poverty and social exclusion • The implementation of the RAPID Programmes • Development partnership with the County Development Board • County Statistics Office

6.1.3 Local Government Reform and the Development of Strategic Policy Committees

Following the recommendations of *Better Local Government,*[125] Strategic Policy Committees (SPCs) were established in the late 1990s to strengthen the role of councillors in the policy-making process and allow local government to develop policies in a spirit of partnership with representatives of local communities and local sectoral interests. Section 48 of the Local Government Act, 2001, provided a statutory basis for SPCs. The Act stated that SPCs would "consider matters connected with the formulation, development, monitoring and review of policy which relate to the functions of the local authority and adivise the authority on those matters". The role of the SPC is to assist the County Council to form, develop and review policies for services within the local authority area. Their development serves to enhance local democracy by ensuring that local communities and their representatives have a say in the provision of local services.

[125] In 1996, the Department of Environment, Heritate and Local Government published a policy document for the modernisation of Local Government, entitled *Better Local Government - A Programme for Change*. This Programme outlined various measures to improve service provision and efficiency by local authorities and to improve structures of decision making at local government level. The Report recommended the establishment of Strategic Policy Committees and Corporate Policy Groups to enhance the policy decision-making process.

In South Dublin County Council there are six SPCs that relate to the following areas: (i) the Environment (ii) Transportation (iii) Economic Development and Planning (iv) Arts, Culture, Gaeilge, Education and Libraries, (v) Housing and Social Development, and (vi) Sports, Recreation, Community and Parks. Each SPC is supported by the relevant Directors of Service.

Although there is some variance within local authorities, in most County and City Councils, the elected members of local government comprise roughly two-thirds of the membership of each SPC and the remaining one-third (5 members) comprises representatives from the local business/commercial sector and representatives from the community/voluntary/disadvantaged sector. In South Dublin County Council, each SPC comprises generally between 10 and 12 councillors, with 2 or 3 representatives from the business/commercial sector[126] and 2 or 3 representatives from the community sector. Each SPC includes at least one representative from the *South Dublin Community Forum* and one from the *South Dublin Community Platform*.[127]

6.1.4 Corporate Policy Group (CPG)

The Chairperson of each SPC, plus the Mayor of the Council, also meet in a grouping known as the *Corporate Policy Group (CPG)*.[128] CPGs were developed to coordinate the discussion of issues that might transcend more than one SPC (such as the County Development Plan) and to have a role in the preparation of corporate issues such as the

[126] Five of the SPCs include a trade union representative.
[127] The Community Forum is a representative network of 160 community and voluntary groups in the county. Established in 2000, it is designed to ensure that the views of all local community, residents associations and voluntary organisations are made clear to the various bodies responsible for the future planning and development of the county. While the Community Forum represents the views of community and voluntary groups, the Community Platform represents the interests of approximately 30 organisations whose primary focus is social exclusion; as such it provides a voice for the disabled, travellers, the homeless, the poor and all other minority groups.
[128] Section 133 of the Local Government Act, 2001, provided for the establishment of a Corporate Policy Group in each county/city council.

local authority budget and the local authority's corporate plan. The activity of the CPG is supported by the County Manager.

6.1.5 Area Committees and Local Authority 'Clusters'

In addition to the SPCs, South Dublin County Council has three *Area Committees.* These relate to the geographical areas of (i) Tallaght (ii) Lucan/Clondalkin and (iii) Terenure/Rathfarnham. The Area Committees ensure that local representatives have significant input into Council decisions on critical issues such as housing, development, planning and the environment, which affect the people they represent. While SPCs concentrate on discussing policy issues, Area Committees have a role in considering operational issues.

Another grouping within the local authority is the 'cluster format' adopted by the County Manager and the Corporate Management Team. These clusters are made up of personnel from the Council's Departments, and relate to the following areas: (i) Infrastructure (ii) Quality of Life (iii) Organisational Change (iv) Modernisation and (v) Customer Services. The purpose of the cluster approach is to develop an integrated approach to the planning, development and delivery of programmes. The various clusters, which are effectively teams of senior management within the Council target specific issues and then develop a multi-disciplinary approach to developing solutions.[129]

While area committees are an established governance structure, the development of SPCs, CPGs and County Development Boards (as discussed below), are recent innovations in local governance. County Development Boards (CDBs) were a new structure established in every county/city throughout the country by the Irish government in 2000. The primary function of a County Development Board is to draw up, and work

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[129] The work of the different clusters is elaborated in *South Dublin County: Celebrating Ten Years* (2004, p.32).

towards the implementation of a strategy for economic, social and cultural development within the county.[130]

6.1.6 The South Dublin County Development Board

The *South Dublin County Development Board* was established in March 2000. The Board promotes economic, social and cultural development within the county by co-ordinating and integrating the activities of the various institutions and organisations within the county, including the delivery of services by the individual agencies.[131] The CDB comprises: the Mayor; the six SPC Chairs; the County Manager; representatives of local development agencies; the social partners (including employers, the trade unions, the farming community and the community and voluntary sector); representatives of the state agencies (including the IDA, Enterprise Ireland and FAS); and representatives of the Gardai Siochana and the Health Board.

The development of a broad county strategy is a relatively new phenomenon and has a number of key advantages: firstly, it facilitates institutional learning (and borrowing) between agencies which allows for the generation of communication and interaction economies;[132] secondly, it is useful in identifying mismatches, overlaps and deficiencies in support programmes; thirdly, it helps to alleviate the problems associated with the fragmented and diffuse nature of the support system; and fourthly, by integrating the policy-making process it provides a key focus for strategic development within the county. The development of a county strategy also facilitates the development of integrated services for seamless delivery to the end-user.

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[130] The CDBs operate autonomously under the umbrella of local government.

[131] The Board's Strategy for the social, economic and cultural development of South Dublin County over the period 2002-2012 is outlined in *South Dublin: A Place for People* *(2002).*

[132] The County Development Board is currently in the process of developing a County Statistics Office to integrate information coming from different sources. The aim is to achieve greater accuracy and a more comprehensive and informed view of developments within the county so as to better-inform the policy-making process.

The structure of the County Development Board recognises that policy-makers can benefit from the expertise or insight that local activists have about the areas in which they are involved. Citizens can bring a unique level of expertise and experience to decision-making. This knowledge may relate to local needs such as the need for improved crèches, schools, sports and recreation facilities, as well as to the specific needs of those who are socially excluded. Through consultation and participation, all views, including minority views, can be taken into account, leading to better-informed policies and greater democracy. Formal participatory structures function through the development of two networks of all community and voluntary groups – the Community Forum and the Community Platform.[133]

6.1.7 Conclusion: From Government to Interactive Governance

Over the last decade, new forms of governance have emerged within South Dublin County. The new institutional structures outlined above emphasise *governance* rather than *government*. The concept of governance "describes the pattern or structure of relations that emerges in a socio-political system as 'common' result or outcome of the interacting intervention efforts of all actors involved" (Kooiman, 1993, p.258). This contrasts with the concept of 'government' which is associated with the traditional hierarchical model of decision-making in which policy-making is centralised in the hands of a small number of people. Recent developments in South Dublin County reflect a shift from 'imperative' or do-it-alone governance towards interactive governance, the latter involving co-management and co-arrangements.

Within South Dublin County, the County Council is the key institutional player and the manner in which the local authority intervenes in the local economy and formulates policy in the area of industry, housing, social policy and infrastructure provision, greatly affects the development of the county. Developments within the County are shaped by the operation

[133] Refer to discussions on p.98, footnote 125.

of the various policy-groupings within the Council (the Area Committees, the SPCs, the CPG and the Corporate Management Team 'clusters'), as well as the key governance structure at county level, the South Dublin County Development Board. Interactive governance is dependant upon interactive learning and a major challenge facing the new forms of governance is how to co-ordinate knowledge/information exchange among the parties involved so as to arrive at appropriate solutions to problems. The performance of the SPCs, for example, depends to a great extent on the level of communication and co-operation between senior management within the local authority (the County Manager along with the Directors of Services and their staff) and the elected members of the council. A review of the operation of SPCs (throughout the country) by the Institute of Public Administration,[134] highlighted the importance of the support role provided by the local authority to the elected members, emphasising the need to support the operation of SPCs through the preparation of policy papers and research into the identification of policy options in particular areas. It also pointed to the importance of follow-up after meetings to communicate results to SPC members and other relevant interests, as well as the importance of implementing policy decisions.

In 2005, the County Development Board will undertake a review to identify the key challenges that it faces in promoting the future development of the County.

6.2 The National and EU Contexts

While local institutions and organisations exert the more immediate and direct influence on developments within the county, South Dublin County is also situated in a larger national context and its development is shaped by national political, economic and socio-cultural institutions. In the area of planning, for example, local authority development plans must be consistent with national plans, guidelines and strategies.[135] These in turn

[134] Refer to "Review of the Operation of Strategic Policy Committees" (IPA, 2004).
[135] The main policy documents and guidelines governing the development plans of the local authorities are outlined on p.289 of the *SDC Development Plan 2004-2010*. These

must be consistent with EU Directives and guidelines. The national infrastructural and institutional set-up and the EU context constitute the background institutions that underlie, enable and constrain the activities of the various institutions and organisations at local level.

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include the *National Spatial Strategy 2002-2020*, the *Regional Planning Gudilines for the Greater Dublin Area 2004-2016*, and other guidelines related to environmental protection (including waste management), architectural design and heritage, residential density, landscape, and social and affordable housing. EU Directives, guidelines and funding mechanisms, play a large role in shaping policies at the national level.

Part 7. Conclusion

In his work on *Systems of Innovation*,[136] Fischer (2001) describes innovation as a social process that is spatially, socially and institutionally embedded. The dynamic competitiveness of firms and regions is therefore dependant upon factors such as access to a highly educated and skilled workforce; specialised services and infrastructure; the existence of a critical mass of similar or related economic enterprises; rapid exchange of information and knowledge among firms; interaction between firms, academic institutions and technology institutes; high rates of new business formation; social infrastructure and a culture of trust to facilitate inter-firm co-operation. The presence and combined interaction of all of these factors contribute to the creation of competitive advantage.

Fischer's (2001) analysis highlights the broad range of factors that contribute to successful economic performance - location, demographics, infrastructure provision, education and training, research and technology development, the labour market, industry specialisation and governance. The economic potential of a country or region can only be ascertained by reference to these variables.

From the preceding overview of South Dublin County, one may conclude that the economic advantages of the County reside in its location, the quality of the transport and telecommunications infrastructure, proximity to transport routes and access to other major cities and regions within Ireland and abroad. A major asset of the county is its people. The population is characterized by a young, well educated population, which conforms to the prototype of the Irish workforce presented by Trauth (2000). In *The*

[136] The theory of systems of innovation, associated with authors such as Lundvall (1992, 1999), Nelson (1996) and Freeman (1987, 1995), has become a guiding framework for the analysis of innovation at the national, regional and local level. The concept is used to refer to the set of institutions at a national/local/regional level whose interactions determine the innovative performance of firms and hence the competitiveness of regions.

Culture of an Information Economy: Influences and Impacts in the Republic of Ireland, Trauth characterises the Irish workforce as young, productive, flexible, and enthusiastic; well-rounded in terms of their educational background, able to learn, and co-operative, caring and helpful – with a vision of the whole. These characteristics, she argues, were suited to the development of an information workforce, capable of adapting to the requirements of a changing technological environment and of responding innovatively to developments in the marketplace. Trauth (2000) emphasises that in Ireland, the socio-cultural context, in combination with conscious public policy, and educational and infrastructural coordination, contributed to the rapid transformation of the Irish workforce during the closing decades of the 20th century. Emphasising the importance of the 'fit' between national culture and the information economy, she claims that the socio-cultural context in Ireland was conducive to the development of an information workforce and facilitated the successful growth of the economy.

Social partnership is acknowledged by economic and social analysts to be among the most innovative aspects of the Celtic Tiger. Walsh et al. (1998, pp.15-16) define social partnership as "the search for consensus on economic and social objectives between sectoral interests - trade unions, business, farming organisations - and government". At the county level, South Dublin County Council, working through the South Dublin County Development Board with its membership of a wide range of local institutions, organisations and service providers, has made remarkable achievements over the last ten years in positively shaping developments within the county. However, social partnership is still at an early stage. As emphasised by Sabel (1998) and Kirby (2002), Ireland is still only learning to implement partnership, and the new forms of governance have had limited success in alleviating problems of social exclusion and poverty. The Celtic Tiger has increased incomes in the economy, but there is also evidence of increased polarisation between those who are benefiting from the economic growth and those being marginalised by it. A major challenge to local government in South Dublin County in the coming decade is the alleviation of social and educational disadvantage. Economic growth, job creation, competitiveness, and social justice, may be regarded as the four cornerstones of development.

Local authorities play a strategic role in the physical, social and economic development of regions. The level of input by the local authority is also a key determinant in the relative weight given to physical, economic and social rejuvenation objectives. In recent years, South Dublin County Council has become increasingly entrepreneurial employing public/private partnership mechanisms to achieve development goals. However, in developing a collaborative governance structure, a careful balance must be struck between different agents and institutions involved in the development and planning process in order to ensure balanced and sustainable regeneration. There is also a need for ongoing collaboration and guidance on integration of land use and transport policy.

The importance of EU membership cannot be underestimated. Membership of the EU has played a vital role as a force for change within the county. Apart from the role played by EU Structural and Cohesion Funds in reducing infrastructural deficits, investment in education and the restructuring of the labour market (under the Community Support Framework) have been central in the processes of economic growth.

In the county, the growing internationalisation of markets and technology means that international linkages have become more important in the development process. In Part 5 of this report, the composition of industrial activities in the region and the relative importance of indigenous and foreign industry were analysed. Foreign direct investment (FDI) is a very significant contributor to economic activity and employment in South Dublin. This is also true within the national context. Fitzgerald (2000, p.55) reiterates this view, attributing Ireland's economic success to the enthusiasm with which Ireland approached the globalisation of its economy and the opening up of its society to outside influences. From a policy perspective, awareness of the importance of local-global connections is therefore very important. In the context of increasing globalisation, the global and EU contexts will continue to provide the framework within which South Dublin County's future prosperity and well-being will be decided, developed and secured.

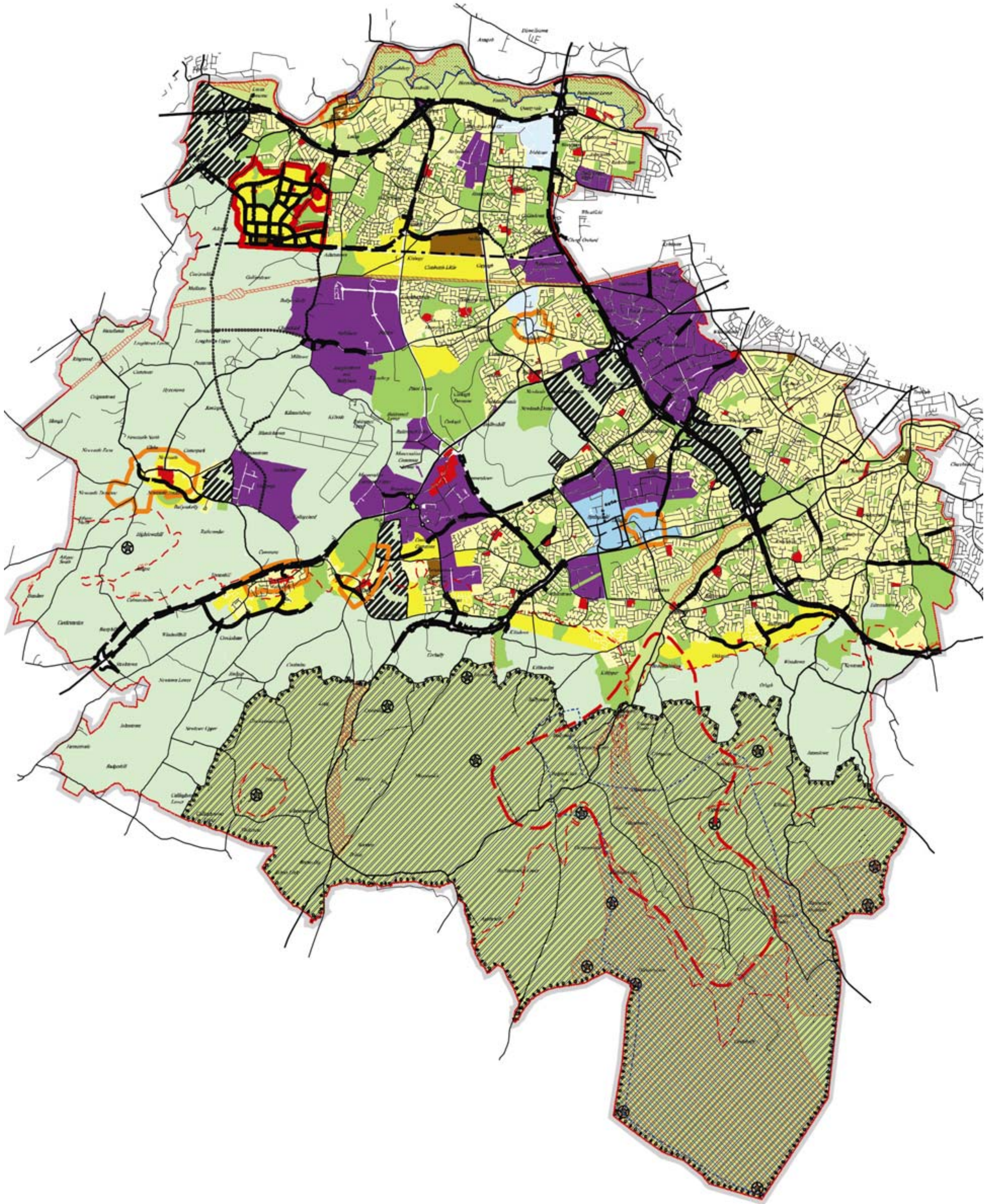
Appendices

Appendix A – List and Map of Electoral Divisions

Electoral Divisions in South Dublin County	
Ballinascorney	Rathfarnham Village
Ballyboden	Saggart
Bohernabreena	Tallaght-Avonbeg
Clondalkin-Ballymount	Tallaght-Belgard
Clondalkin-Cappaghmore	Tallaght-Fettercairn
Clondalkin-Dunawley	Tallaght-Glenview
Clondalkin-Monastery	Tallaght-Jobstown
Clondalkin-Moorfield	Tallaght-Killinardan
Clondalkin-Rowlagh	Tallaght-Kilnamanagh
Clondalkin Village	Tallaght-Kiltipper
Edmondstown	Tallaght-Kingswood
Firhouse-Ballycullen	Tallaght-Millbrook
Firhouse-Knocklyon	Tallaght-Oldbawn
Firhouse Village	Tallaght-Springfield
Lucan-Esker	Tallaght-Tymon
Lucan Heights	Templeogue-Cypress
Lucan-St. Helen's	Templeogue-Kimmage Manor
Newcastle	Templeogue-Limekiln
Palmerston Village	Templeogue-Orwell
Palmerston West	Templeogue-Osprey
Rathcoole	Templeogue Village
Rathfarnham-Ballyroan	Terenure-Cherryfield
Rathfarnham-Butterfield	Terenure-Greentrees
Rathfarnham-Hermitage	Terenure-St. James
Rathfarnham-St. Enda's	

Map of Electoral Divisions in South Dublin County

Appendix B – Industrial Zoned Lands



DEVELOPMENT PLAN
2004 - 2010

USE ZONING OBJECTIVES

Objective A	To protect and / or improve Residential Amenity.	
Objective A1	To provide for new Residential Communities in accordance with Approved Area Plans.	
Objective B	To protect and improve Rural Amenity and to provide for the development of Agriculture.	
Objective CT	To protect, improve and provide for the future development of the County Town of Tallaght.	
Objective TC	To protect, provide for and / or improve Town Centre facilities.	
Objective DC	To protect, provide for and / or improve District Centre facilities.	
Objective LC	To protect, provide for and / or improve Local Centre facilities.	
Objective E	To provide for Enterprise, Employment and Related Uses.	
Objective F	To preserve and provide for Open Space and Recreational Amenities.	
Objective G	To protect and improve High Amenity Areas.	
Objective GB	To preserve a "Green Belt" between development areas.	
Objective H	To protect and enhance the outstanding natural character of the Dublin Mountain Area.	

Appendix C – A Breakdown of Population Statistics by Electoral Division

Population in South Dublin County by Electoral Division

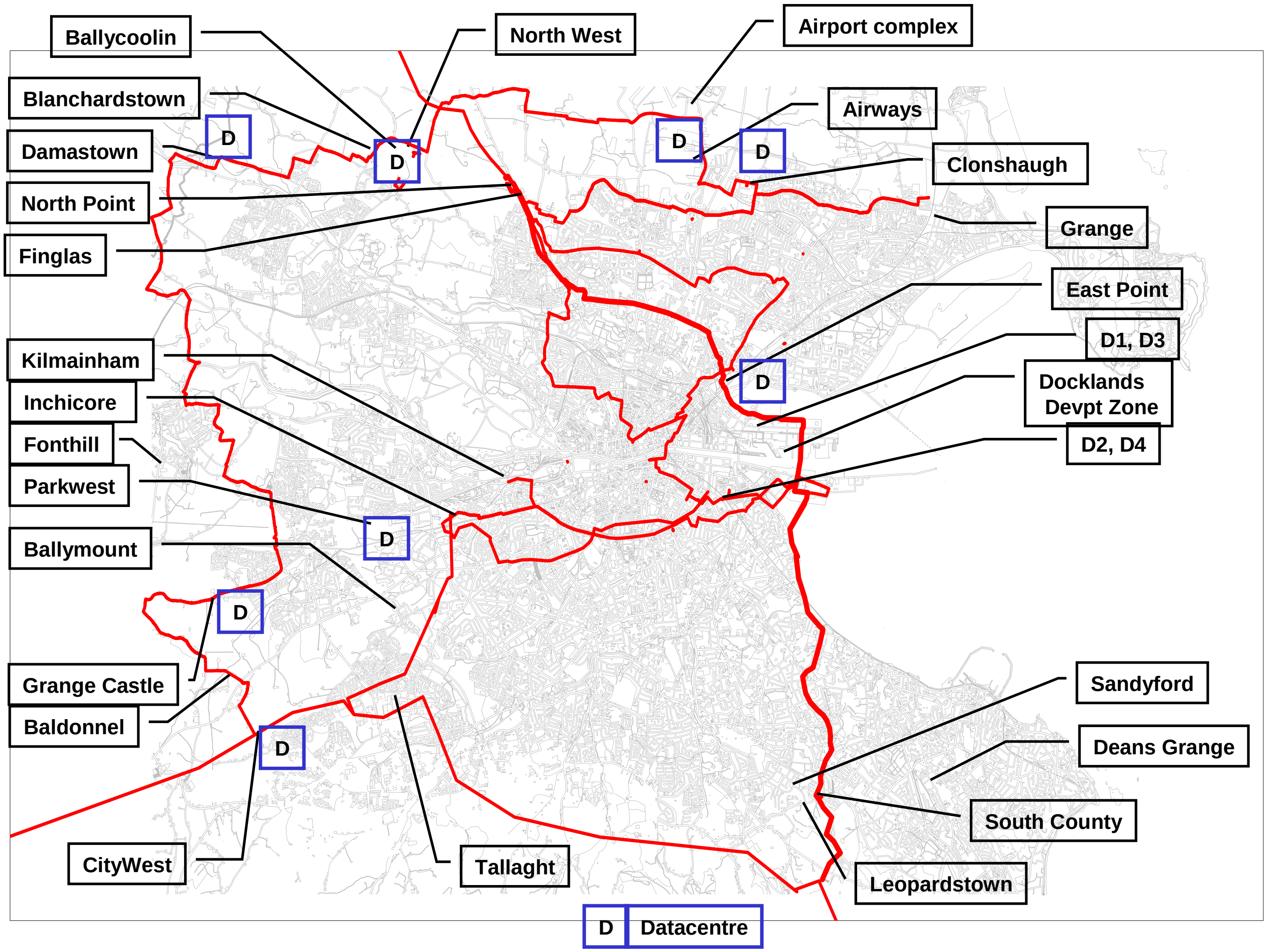
Population Geographic Area	Persons 1996	Persons 2002	Males 2002	Females 2002	Actual Change in population 1996-2002	Percentage Change in population 1996-2002	Area (hectares)
South Dublin County	**218,728**	**238,835**	**117,516**	**121,319**	**20,107**	**9.2**	**22,301.00**
• Ballinascorney	514	657	349	308	143	27.8	2421
• Ballyboden	5,260	5,285	2,579	2,706	25	0.5	119
• Bohernabreena	2,681	3,936	1,954	1,982	1,255	46.8	4375
• Clondalkin-Ballymount	1,812	2,011	1,018	993	199	11	316
• Clondalkin-Cappaghmore	1,825	1,609	758	851	-216	-11.8	205
• Clondalkin-Dunawley	9,289	10,710	5,157	5,553	1,421	15.3	481
• Clondalkin-Monastery	8,633	9,363	4,650	4,713	730	8.5	388
• Clondalkin-Moorfield	6,697	6,246	3,084	3,162	-451	-6.7	209
• Clondalkin-Rowlagh	5,238	4,504	2,207	2,297	-734	-14	73
• Clondalkin Village	8,123	8,595	4,240	4,355	472	5.8	602
• Edmondstown	4,863	5,846	2,872	2,974	983	20.2	422
• Firhouse-Ballycullen	4,603	6,594	3,268	3,326	1,991	43.3	283
• Firhouse-Knocklyon	4,629	4,331	2,154	2,177	-298	-6.4	105
• Firhouse Village	6,859	9,024	4,477	4,547	2,165	31.6	235
• Lucan-Esker	7,451	20,807	10,408	10,399	13,356	179.3	645
• Lucan Heights	5,817	5,719	2,795	2,924	-98	-1.7	366
• Lucan-St. Helen's	6,915	7,045	3,532	3,513	130	1.9	1004
• Newcastle	2,374	2,355	1,221	1,134	-19	-0.8	3200
• Palmerston Village	3,961	3,929	1,898	2,031	-32	-0.8	121
• Palmerston West	8,449	8,130	3,988	4,142	-319	-3.8	393
• Rathcoole	3,448	3,204	1,660	1,544	-244	-7.1	1536
• Rathfarnham-Ballyroan	2,903	2,679	1,292	1,387	-224	-7.7	68
• Rathfarnham-Butterfield	3,323	3,222	1,532	1,690	-101	-3	71
• Rathfarnham-Hermitage	4,284	4,468	2,163	2,305	184	4.3	75
• Rathfarnham-St. Enda's	4,493	4,234	1,962	2,272	-259	-5.8	111
• Rathfarnham Village	2,757	3,114	1,462	1,652	357	12.9	77
• Saggart	1,408	1,588	766	822	180	12.8	1345
• Tallaght-Avonbeg	1,967	1,645	792	853	-322	-16.4	38
• Tallaght-Belgard	2,067	1,970	1,017	953	-97	-4.7	272

Population in South Dublin County by Electoral Division

Population Geographic Area	Persons 1996	Persons 2002	Males 2002	Females 2002	Actual Change in population 1996-2002	Percentage Change in population 1996-2002	Area (hectares)
• Tallaght-Fettercairn	5,513	6,488	3,087	3,401	975	17.7	461
• Tallaght-Glenview	1,430	1,496	740	756	66	4.6	45
• Tallaght-Jobstown	7,294	9,838	4,837	5,001	2,544	34.9	277
• Tallaght-Killinardan	4,970	4,700	2,223	2,477	-270	-5.4	75
• Tallaght-Kilnamanagh	5,633	5,323	2,695	2,628	-310	-5.5	213
• Tallaght-Kiltipper	5,237	5,333	2,637	2,696	96	1.8	166
• Tallaght-Kingswood	4,539	4,250	2,131	2,119	-289	-6.4	181
• Tallaght-Millbrook	4,508	3,917	1,963	1,954	-591	-13.1	71
• Tallaght-Oldbawn	5,040	4,580	2,290	2,290	-460	-9.1	144
• Tallaght-Springfield	7,803	7,787	3,918	3,869	-16	-0.2	202
• Tallaght-Tymon	6,289	5,604	2,754	2,850	-685	-10.9	203
• Templeogue-Cypress	3,253	3,079	1,543	1,536	-174	-5.3	71
• Templeogue-Kimmage Manor	3,520	4,396	2,173	2,223	876	24.9	114
• Templeogue-Limekiln	4,261	3,874	1,852	2,022	-387	-9.1	114
• Templeogue-Orwell	2,871	2,629	1,324	1,305	-242	-8.4	45
• Templeogue-Osprey	3,029	2,798	1,385	1,413	-231	-7.6	139
• Templeogue Village	1,728	1,607	738	869	-121	-7	51
• Terenure-Cherryfield	2,341	2,228	1,083	1,145	-113	-4.8	44
• Terenure-Greentrees	3,201	2,980	1,418	1,562	-221	-6.9	65
• Terenure-St. James	3,625	3,108	1,470	1,638	-517	-14.3	64

Source: Derived from 1996 and 2002 Census, CSO

Appendix D – ESB Broadband Infrastructure In South Dublin County



Appendix E – Labour Force Statistics by Electoral Division

Labour Force, Unemployment and Participation Rate for 1996 and 2002

Geographical Area	Unemployment Rate 2002	Unemployment Rate 1996	Change 1996 - 2002	Participation Rate 2002	Participation Rate 1996	Change 1996 - 2002	Labour Force	Persons (aged > 15)	At work
State	8.8%	14.8%	5.9%	58.3%	55.4%	2.8%	1,800,933	3,089,775	1,641,587
Dublin City and County	8.5%	15.5%	7.0%	61.2%	58.6%	2.5%	555,306	907,629	508,030
Dublin City	10.4%	19.3%	8.9%	60.2%	57.9%	2.3%	250,330	415,609	224,300
Dún Laoghaire-Rathdown	5.7%	9.6%	3.9%	56.0%	56.1%	-0.1%	86,896	155,035	81,930
Fingal	6.9%	11.3%	4.5%	64.8%	60.9%	4.0%	98,448	151,821	91,699
South Dublin	8.0%	14.9%	6.9%	64.6%	61.1%	3.5%	119,632	185,164	110,101
Ballinascorney	8.1%	28.1%	20.0%	66.1%	56.0%	10.1%	335	507	308
Ballyboden	3.8%	5.4%	1.6%	63.7%	65.6%	-1.9%	2,549	4,003	2,452
Bohernabreena	9.5%	22.5%	13.0%	67.6%	58.3%	9.3%	2,022	2,990	1,830
Clondalkin-Ballymount	5.7%	11.6%	5.9%	68.1%	67.3%	0.8%	1,021	1,499	963
Clondalkin-Cappaghmore	14.4%	25.3%	10.9%	57.3%	55.4%	2.0%	675	1,177	578
Clondalkin-Dunawley	12.9%	26.3%	13.4%	67.5%	58.9%	8.6%	5,335	7,907	4,648
Clondalkin-Monastery	6.8%	11.4%	4.6%	67.5%	65.8%	1.7%	4,957	7,344	4,619
Clondalkin-Moorfield	12.3%	28.9%	16.6%	63.0%	65.2%	-2.2%	2,843	4,514	2,492
Clondalkin-Rowlagh	19.0%	36.8%	17.8%	64.3%	62.4%	1.9%	2,121	3,298	1,717
Clondalkin Village	7.2%	10.5%	3.3%	68.0%	66.8%	1.2%	4,537	6,674	4,210
Edmondstown	7.5%	17.2%	9.7%	65.8%	60.9%	4.9%	2,885	4,386	2,670
Firhouse-Ballycullen	3.6%	3.4%	-0.3%	71.3%	74.5%	-3.2%	3,294	4,619	3,174
Firhouse-Knocklyon	4.3%	5.7%	1.4%	59.1%	56.9%	2.2%	2,100	3,553	2,010
Firhouse Village	5.8%	7.9%	2.1%	69.5%	66.6%	2.9%	4,640	6,679	4,370
Lucan-Esker	4.7%	8.7%	4.0%	81.2%	81.6%	-0.3%	12,605	15,523	12,008
Lucan Heights	5.8%	7.6%	1.8%	59.5%	60.4%	-0.8%	2,768	4,649	2,608
Lucan-St. Helen's	4.9%	7.6%	2.8%	66.6%	63.8%	2.8%	3,786	5,681	3,602
Newcastle	4.0%	8.3%	4.3%	55.7%	55.6%	0.1%	1,119	2,009	1,074

Labour Force, Unemployment and Participation Rate for 1996 and 2002

Geographical Area	Unemployment Rate 2002	Unemployment Rate 1996	Change 1996 - 2002	Participation Rate 2002	Participation Rate 1996	Change 1996 - 2002	Labour Force	Persons (aged > 15)	At work
Palmerston Village	5.3%	9.4%	4.0%	55.7%	58.7%	-3.0%	1,814	3,259	1,717
Palmerston West	11.6%	21.1%	9.5%	59.5%	60.2%	-0.7%	3,568	5,999	3,154
Rathcoole	5.3%	9.9%	4.6%	63.6%	58.0%	5.5%	1,709	2,689	1,618
Rathfarnham-Ballyroan	3.9%	5.5%	1.6%	49.6%	52.2%	-2.6%	1,133	2,285	1,089
Rathfarnham-Butterfield	5.0%	6.5%	1.6%	51.6%	52.9%	-1.4%	1,409	2,732	1,339
Rathfarnham-Hermitage	4.2%	5.4%	1.2%	61.1%	59.0%	2.1%	2,093	3,423	2,005
Rathfarnham-St. Enda's	5.3%	9.0%	3.7%	60.7%	59.9%	0.8%	2,102	3,465	1,991
Rathfarnham Village	3.8%	5.2%	1.4%	57.6%	54.0%	3.6%	1,503	2,608	1,446
Saggart	7.2%	15.8%	8.5%	54.8%	52.4%	2.4%	747	1,364	693
Tallaght-Avonbeg	14.0%	28.1%	14.2%	62.1%	63.4%	-1.3%	817	1,316	703
Tallaght-Belgard	5.8%	9.0%	3.2%	65.6%	61.7%	3.9%	1,087	1,657	1,024
Tallaght-Fettercairn	19.0%	47.9%	28.9%	63.6%	56.6%	7.0%	2,640	4,153	2,138
Tallaght-Glenview	10.3%	17.2%	6.8%	62.7%	63.9%	-1.2%	756	1,205	678
Tallaght-Jobstown	14.5%	36.0%	21.4%	70.0%	60.0%	10.0%	4,668	6,673	3,989
Tallaght-Killinardan	22.4%	43.5%	21.1%	63.7%	57.5%	6.3%	2,067	3,244	1,604
Tallaght-Kilnamanagh	5.5%	11.6%	6.1%	67.7%	62.2%	5.5%	2,863	4,232	2,705
Tallaght-Kiltipper	13.5%	25.2%	11.7%	66.4%	60.1%	6.3%	2,539	3,826	2,196
Tallaght-Kingswood	5.5%	11.8%	6.3%	68.1%	61.6%	6.5%	2,303	3,384	2,177
Tallaght-Millbrook	8.2%	14.5%	6.3%	63.5%	62.8%	0.7%	2,115	3,329	1,942
Tallaght-Oldbawn	6.8%	11.7%	4.8%	64.1%	60.3%	3.8%	2,436	3,799	2,270
Tallaght-Springfield	11.3%	18.1%	6.8%	64.2%	62.5%	1.7%	4,009	6,246	3,556
Tallaght-Tymon	11.4%	19.1%	7.7%	64.7%	59.5%	5.2%	2,977	4,601	2,638
Templeogue-Cypress	3.6%	6.2%	2.7%	59.4%	56.7%	2.6%	1,573	2,650	1,517
Templeogue-Kimmage Manor	3.4%	6.7%	3.3%	57.9%	53.1%	4.9%	2,139	3,692	2,066
Templeogue-Limekiln	5.8%	10.4%	4.5%	61.5%	61.6%	-0.1%	1,990	3,237	1,874
Templeogue-Orwell	3.7%	5.2%	1.5%	57.0%	54.7%	2.3%	1,256	2,202	1,210
Templeogue-Osprey	3.3%	5.8%	2.5%	62.0%	60.4%	1.6%	1,423	2,296	1,376
Templeogue Village	5.0%	5.6%	0.5%	45.9%	47.3%	-1.4%	638	1,389	606

Labour Force, Unemployment and Participation Rate for 1996 and 2002

Geographical Area	Unemployment Rate 2002	Unemployment Rate 1996	Change 1996 - 2002	Participation Rate 2002	Participation Rate 1996	Change 1996 - 2002	Labour Force	Persons (aged > 15)	At work
Terenure-Cherryfield	4.3%	11.0%	6.7%	51.0%	51.8%	-0.8%	967	1,896	925
Terenure-Greentrees	6.4%	8.7%	2.3%	48.2%	49.5%	-1.3%	1,216	2,525	1,138
Terenure-St. James	6.7%	10.9%	4.3%	53.4%	58.8%	-5.4%	1,483	2,776	1,384

Source: Derived from 1996 and 2002 Census, CSO

Appendix F – Number of Firms in Business Parks and Industrial Estates

Business Parks in South Dublin County by Geographic Area

Description	Area	No. of Businesses
Baldonnel Business Park	Baldonnel	23
Centre Point Business Park, Oak Road, Dublin 12	Clondalkin	70
Nangor Road Business Park	Clondalkin	18
Red Cow Business Park	Clondalkin	7
Knockmitten Lane Business Park, Nangor Rd	Clondalkin	12
Montone Business Park, Oak Road	Clondalkin	4
Parkwest Enterprise Centre, Dublin 12	Clondalkin	33
Riverview Bus Park, Nangor Road	Clondalkin	51
Grange Castle Business Park, Clondalkin	Clondalkin	3
Newlands Business Park, Clondalkin	Clondalkin	7
OMAC Business Centre, Clondalkin	Clondalkin	5
Red Cow Interchange Estate	Clondalkin	10
Robinhood Business Park	Clondalkin	12
Station Road Business Park, Clondalkin	Clondalkin	21
Western Ind Est Phase II/Western Bus Park	Clondalkin	54
Willow Business Park, Knockmitten Lane	Clondalkin	23
Ashleaf Business Centre, Dublin 12	Crumlin,	4
Palmerstown Business Park	Palmerstown	6
Blackchurch Business Park, Rathcoole	Rathcoole	1
Glebe Bus Pk, Rathcoole	Rathcoole	3
Airton Business Park, Tallaght	Tallaght	4
Greenhills Business Centre, Greenhills Road	Tallaght	7
Greenhills Business Park, Tallaght	Tallaght	22
M50 Business Park	Tallaght	26
Magna Business Park, Citywest	Tallaght	3
Main Street Enterprise Centre, Tallaght	Tallaght	1
Motor Centre, The Square, Tallaght	Tallaght	6
Parkway Business Centre, Ballymount	Tallaght	9
Square Industrial Complex, Tallaght	Tallaght	14
Swanward Business Centre, Dublin 24	Tallaght	9
Tallaght Business Park (Whitestown)	Tallaght	62
Tallaght/Broomhill Business Park	Tallaght	72
Taurus Business Park, Greenhills Road	Tallaght	9

Business Parks in South Dublin County by Geographic Area

Description	Area	No. of Businesses
CityWest Business Campus, Dublin	Tallaght, CityWest	110
Ballymount Court Business Centre	Walkinstown	14
Ballymount Trading Estate	Walkinstown	6
Bridgecourt Office Park, Walkinstown	Walkinstown	5
Calmount Business Park, Ballymount Road	Walkinstown	32
Hill Crest Business Park, Walkinstown	Walkinstown	4
Limekiln Business Park, Walkinstown	Walkinstown	3
Long Mile Business Centre	Walkinstown	17
Merrywell Business Park, Dublin 12	Walkinstown	18
Westgate Business Park, Ballymount	Walkinstown	7
Westway Centre, The, Dublin 12	Walkinstown	24
Western Parkway Business Centre, Dublin 12	Walkinstown	50
Western Parkway Business Park, Dublin 12	Walkinstown	28
	Total	**929**

Source: Derived from Kompass data

Industrial Estates in South Dublin County by Geographic Area

Description	Area	No. of Businesses
Cherry Orchard Industrial Estate, Ballyfermot	Ballyfermot	72
Bridges Industrial Estate, Naas Road	Clondalkin	13
Clondalkin Industrial Estate	Clondalkin	71
Cloverhill Industrial Estate, Clondalkin	Clondalkin	9
Crag Industrial Centre, Clondalkin	Clondalkin	3
Elmfield Industrial Estate, Clondalkin	Clondalkin	1
Fonthill Industrial Park, Clondalkin	Clondalkin	26
Green Isle Estate, Naas Road	Clondalkin	9
JFK Industrial Estate, Naas Road	Clondalkin	88
Kilcarberry Industrial Park, Clondalkin	Clondalkin	21
Oakfield Industrial Estate, Clondalkin	Clondalkin	15
Park West Industrial Estate, Dublin 12	Clondalkin	148
Riversdale Industrial Estate, Dublin 12	Clondalkin	6
Robinhood Industrial Estate	Clondalkin	49
St Anthony's Industrial Estate, Ballymount	Clondalkin	10
St Joans Industrial Estate, Ballymount	Clondalkin	5
Turnpike Industrial Estate	Clondalkin	15
Weatherwell Industrial Estate, Clondalkin	Clondalkin	25
Western Industrial Estate, Naas Road	Clondalkin	100
Adamstown Industrial Estate, Lucan	Lucan	4
Hills Industrial Estate, Lucan	Lucan	15
Greenogue Industrial Estate, Rathcoole	Rathcoole	86
Avonbeg Industrial Estate, Dublin 12	Tallaght	16
Belgard Industrial Estate	Tallaght	8
Cookstown Industrial Estate, Tallaght	Tallaght	160
Crossbeg, Dublin 24	Tallaght	3
Greenhills/Hibernian/Sitecast (Tallaght)	Tallaght	33
Landys Industrial Estate, Dublin 16	Tallaght	7
Monarch Industrial Estate, Tallaght	Tallaght	4
Pineview Industrial Estate, Firhouse Road	Templeogue	13
Ballymount Cross Industrial Estate	Walkinstown	47
Ballymount Industrial Estate	Walkinstown	78
Ballymount Road Industrial Estate	Walkinstown	2
Crosslands Industrial Park, Dublin 12	Walkinstown	6
Greenhills Ind Estate/Beechlawn Ind Complex	Walkinstown	64

Industrial Estates in South Dublin County by Geographic Area

Description	Area	No. of Businesses
Mulcahy Keane Industrial Estate, Walkinstown	Walkinstown	43
Old Sawmills Industrial Estate, Walkinstown	Walkinstown	8
Parkmore Industrial Estate, Dublin 12	Walkinstown	24
Sunbury Industrial Estate, Walkinstown	Walkinstown	5
	Total	**1312**

Source: Derived from Kompass data

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