

**Economic Development Strategy
for the Metro North Economic
Corridor (MNEC)**

**The Development of an
Internationally Sustainable Airport
City Region**

**Volume 1 - Summary of Main
Findings and Recommendations**

Prepared for

Fingal County Council

By

**Indecon International Economic
Consultants**

Indecon

www.indecon.ie

May 2008

Contents

Page

Executive Summary

i

Summary of Main Findings and Recommendations

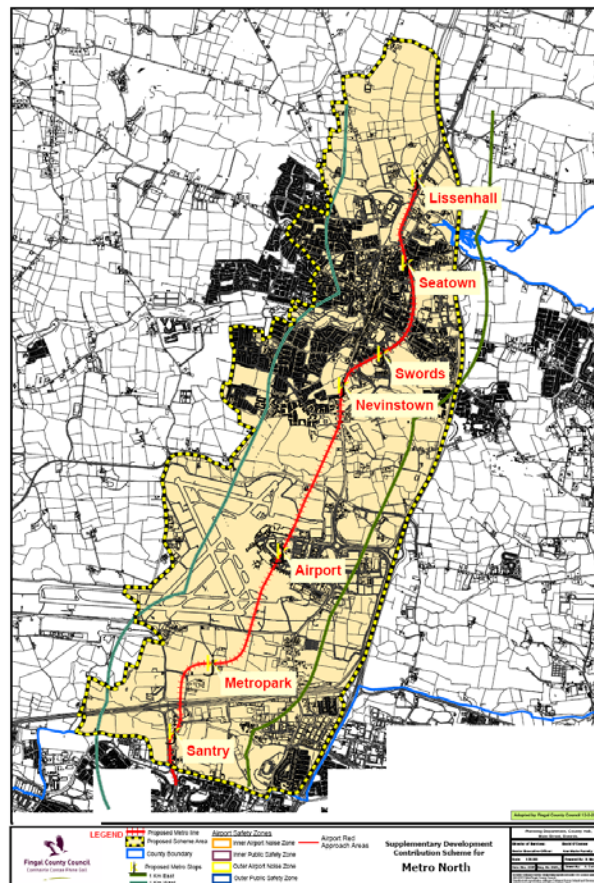
1

Executive Summary

Introduction and Background

This report is submitted to Fingal County Council by Indecon International Economic Consultants. Valuable inputs to Indecon’s analysis were also received from RPS Consultants and Bone Wells Associates who co-operated with Indecon on this assignment. The report concerns the formulation of an Economic Development Strategy for the Metro North Economic Corridor (MNEC), which is part of the Fingal County Council area. The definition of the Metro North Economic Corridor is the area of land that is approximately 1 kilometre on either side of the proposed Metro North Light Rail line. This extends from North of Swords at Lissenhall to the South Fingal area and incorporates Swords, Dublin Airport and Metro Park. Figure 1.1 below represents a geographical presentation of this defined area. From an economic perspective this includes 11 electoral districts which are either fully or partially included within the Corridor Area. It is envisaged that the implementation timeframe for the strategy would see most of the development being completed by 2025 – 2030 period subject to infrastructural provision.

Schematic Outline of Proposed MNEC



Source: Fingal County Council (Supplementary Development Contribution Scheme for Metro North).
 Note: The route of the MNL is shown as the red rail line. The MNEC is the lightly shaded area.

The Economic Development Strategy is required by Fingal County Council to identify, specify and prioritise the potential levels of economic footprint, commercial activities, competencies and labour skills and services that will be required to sustain the growing communities and businesses located within and adjacent to the MNEC.

This strategy is designed to deliver a fundamentally changed vision for the development of Swords and the wider MNEC, which will coincide with the delivery of major infrastructure investment, including in particular the Metro North Light Rail (MNLr). The strategy will play a central role in shaping other economic development and planning strategies for Fingal in the future, including the new Swords Town Area plan, which is under preparation by Fingal County Council. The strategy is also designed to ensure the maximum economic benefits are derived from the government's investment in the Metro North Light Rail, thereby maximising value for money.

Investment and Economic Snapshot of MNEC

A detailed analysis of the economic structure, employment status and skills base of the MNEC has been undertaken, including extensive analysis of new empirical evidence on the Corridor. The assessment also outlined the investment situation in relation to IDA-supported companies in the Corridor and provided a case study on the region's largest industry – aviation.

The table below highlights the current level and recent growth in the population of the MNEC in a comparative context, highlighting the fact that the Corridor area has experienced very rapid population expansion, amounting to an increase of almost one-third between the last two censuses. This rate of increase in population in the Corridor has substantially exceeded that recorded in Fingal and Dublin as a whole, and the State over the period since 2002.

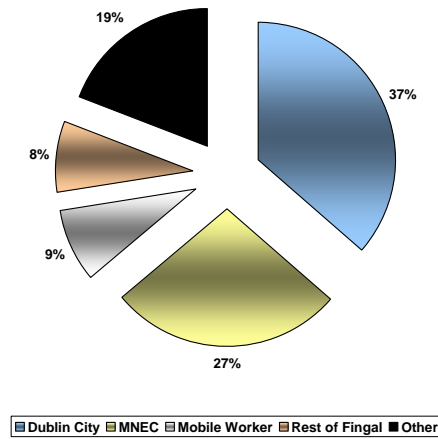
Population of Selected Areas in 2002 and 2006

Location	2002	2006	% Change
MNEC	44,303	58,880	32.9
Fingal	196,413	239,992	22.2
Dublin City	495,781	506,211	2.1
State	3,917,203	4,239,848	8.2

Source: Indecon Analysis of CSO Census of Population Data.

In terms of MNEC residents, nearly 70% of the population over 15 is at work. The figure overleaf highlights the breakdown of residents in the MNEC according to their place of work in 2006. It is notable that a majority of MNEC residents who are currently employed, work outside the Corridor, with the largest single segment (37%) travelling to work in Dublin City. Other work destinations include the rest of Fingal (8%), while 9% are mobile workers. Overall, 73% of MNEC residents work outside of the Corridor which in part reflects the fact that the Corridor has not yet developed a sufficient base of high skilled value added employment. Ensuring that high skilled employment opportunities are provided for existing residents and for the projected increase in residents in the Corridor is a key objective of our proposed economic development strategy for the Corridor.

Breakdown of Residents in the MNEC by Place of Work, 2006



Source: Indecon analysis of CSO Census 2006 Data (POWCAR) *

The table below describes the residence of persons who hold jobs located within the Metro North Economic Corridor. The largest proportion of people working in the Corridor (49.4%) resides in Fingal. The second most common residential location for Corridor workers was Dublin City (25%). It is notable that only 28% of persons who are employed in the Corridor actually live in the Corridor.

Place of Residence of Persons Employed in the MNEC

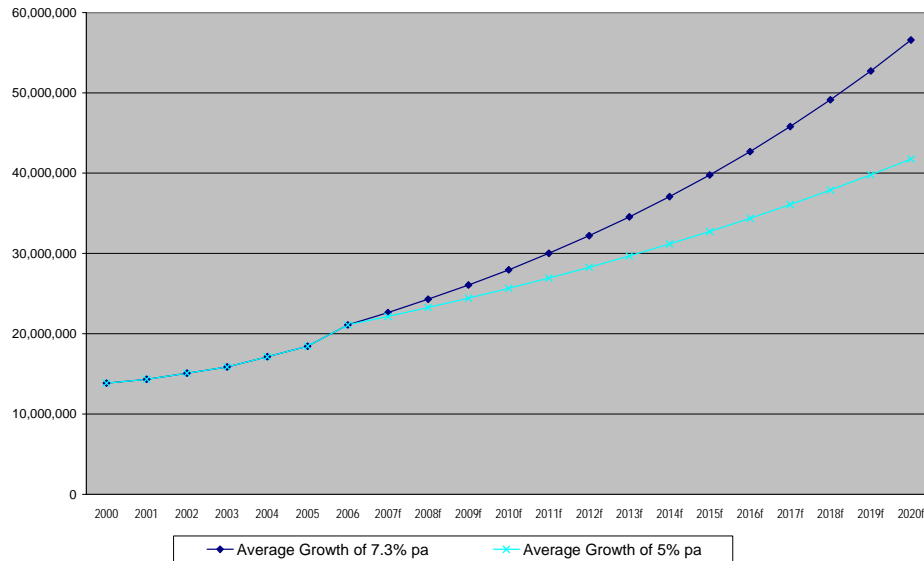
Region	Number	% of Total
MNEC	8,299	27.6
Dublin City	7,515	25
South Dublin	1,394	4.6
Fingal	14,834	49.4
Dún Laoghaire-Rathdown	609	2
Louth and Meath	4,073	13.6
Other Regions	1,600	5.3
Total	30,025	100

Source: Indecon Analysis of CSO 2006 Data (POWCAR)

Given the importance of Dublin Airport for employment in the Corridor, it is useful to review developments at Dublin Airport in more detail. The figure below highlights the recent trends in and projections for passengers using Dublin Airport out to 2020. This shows the recent very rapid growth recorded in passenger numbers and the prospects for further strong growth, underlying the importance of this critical infrastructure, both for the MNEC and the country as a whole.

* It should be noted the POWCAR estimate of employment by place of work in the MNEC area does not include persons in respect of whom place of work was not indicated or was not sufficiently clear for coding purposes (7 per cent nationally), mobile workers with no fixed place of work (11 per cent nationally), persons who work from home (6 per cent nationally).

Projection of Total Passenger Numbers at Dublin Airport to 2020



Source: Indecon analysis of Dublin Airport Authority (DAA) Annual Reports

The Metro North Economic Corridor has significant strengths and potential for sustainable economic development. Particular strengths of the MNEC, which, *inter alia*, shape the formulation of the Economic Development Strategy for the Corridor, are highlighted below. The existing base of economic activity is not, however, sufficient to accommodate the rapid growth in population envisaged for the Corridor. There is therefore a need for a significant change in the scale and composition of the economic base in the Corridor.

Summary of Key Strengths of MNEC Area

- Metro North rail link
- A high employment rate
- A low dependency rate (retired, unable to work and students)
- A relatively large portion of people in the 25-44 years demographic category
- Available labour/skills pool within the workforce with relatively high educational attainment
- Location within MNEC of Dublin Airport
- Access to national and international markets by virtue of road network,
- Proximity to major seaports including Dublin Port and the proposed Braemore Port
- Existing base of foreign and indigenous firms
- Planned critical mass of population
- Access to major 3rd/4th-level institutions in North Dublin/Dublin area
- A high Quality of Life in the area

Source: Indecon analysis

The recommended economic development strategy for the MNEC involves a radical transformation of economic activity in the Corridor to provide higher value jobs within the region. As part of the Economic Development Strategy, we envisage there to be a mix of science and technology (ICT and biotechnology, which are the key sectors being targeted by SFI), professional and business services, environmental services and leisure, recreational and tourist services. As indicated subsequently we also believe there is significant opportunities for the MNEC in relation to a potential university campus and a potential new hospital. Airport related activities will also continue to be of importance for the Corridor. These activities are considered in more detail when we examine proposed strategic sites within the MNEC (Swords, Metropark and Dublin Airport Eastlands).

Airport-Related Development

Indecon believes that there is potential for the MNEC as a whole to develop the beneficial aspects of an airport city region. Our case study review illustrates that airport city development is not necessarily the preserve of international hub airports; the experience of certain European airports, such as Dusseldorf, Munich and Vienna, suggest that the airport city concept has the potential to develop in point-to-point (spoke) airports, of which Dublin Airport is an example. However, we are of the view that development of the Corridor as an airport city region should be planned in a manner which gives priority to the efficient development of the airport as a core national infrastructure. We would also advise against restricting the definition of appropriate activities to those which intensively use the airport or are directly linked with the airport.

Science and Technology-High Skilled Services

As indicated previously our economic analysis of the Corridor indicates that there is a need for a major enhancement of the level of value added and skills of employment within the Corridor and we believe this must include science and technology and high skilled services. We have considered both national and international best practice models which may appropriately inform the development of the MNEC.

Environmental Technology/Products/Services

There is potential for significant growth in economic activities involving green technologies in response to increased consumer awareness as well as regulatory and other changes reflecting the economic costs of harmful emissions. Within the Irish market there will be increased commercial opportunities arising from environmental awareness and these will be stimulated further by the recent changes announced in the 2008 Finance Bill. Possibly even more significant is the fact that the European and international markets for green technologies and for green consumer goods is likely to demonstrate rapid growth. These products and technologies involve the use of renewable industrial feedstocks and reduced levels of waste and energy consumption and high levels of recycling.

University Campus

The Metro North Economic Corridor represents an excellent location for education related development. Developing a new campus within the Corridor has significant potential. The drivers of this potential development include capacity issues at existing colleges, adoption of international best practices and the attraction that would be afforded by having a new campus located close to a metro stop. The realisation of such a new campus would have significant development and marketing potential for the Corridor and Indecon would recommend Fingal County Council to work with existing challenges to support this proposal. We have examined a number of best practice models for educational-related developments including Centennial Corridor in North Carolina.

Hospital/Health Care Infrastructure

It is likely that future health needs of the Corridor population will increase the demand for hospital and medical care to 'high' within the MNEC. Currently, the main hospital serving the needs of the MNEC and east Fingal is Beaumont Hospital, with Our Lady of Lourdes Hospital in Drogheda serving parts of north Fingal and the North East of the country. As the population of the Corridor expands rapidly, we envisage a corresponding requirement for a hospital facility to serve the needs of the MNEC. A hospital would also provide important linkages with medical education and training and with research and development activities.

Opportunity for Future Knowledge-Based Industries in the MNEC

We considered the appropriate pattern of future economic activities within the Corridor to 2025-30 and these are described in the figure overleaf. These highlight the importance of science and technology industries, knowledge based services, environmental technologies/products and services, higher education, health care and other activities including airport related employment.

Indecon Assessment of Potential Current and Future Demand for Knowledge based Industries in the MNEC (2007-2025-30)

Summary of Indecon's Assessment of Potential Current and Future Demand for Economic Activities in the MNEC			
	Current Demand	Future Demand	Drivers
Knowledge-Based (S+T) Industries			
Biotechnology	Low-Moderate	Moderate-High	Investment into Corridor, improved transport, skilled labour, national and international trends, SFI sector (mix of foreign and domestic)
ICT	Low-Moderate	Moderate-High	As above
Micro-electronics	Low-Moderate	Moderate	Investment into Corridor, improved transport, skilled labour, national and international trends (mainly foreign)
Medical Devices	Low-Moderate	Moderate	As above
Aerospace Equipment	Low-Moderate	Low-Moderate	No tradition of manufacturing in MNEC
Knowledge-Based (Professional) Industries			
Financial & Insurance Services	Low	High	Investment into Corridor, need to ensure greater competitiveness, attractive location (mainly domestic)
Professional Services (Business & Legal)	Low	High	As above
Public Sector	Low	Moderate	Greater levels of economic activity will necessitate a raised level of demand for administrative services
Environmental Technologies / Products / Services	Moderate	High	Consumer awareness, regulatory, economic and fiscal changes
Higher Education			
Third-Level Education (undergraduate and largely-taught masters degrees)	Low	High	Knowledge-based industries, upskilling of general population
Fourth-Level (research masters and doctoral degrees)			
Hospital	Moderate-High	High	MNEC rapidly growing population centre; demand also from east/coastal Fingal County
Other Activities			
Aviation & Transport Logistics	Moderate-High	Moderate-High	Growth in demand for passenger and air cargo services
Construction Services	Moderate-High	Moderate	During the development of the MNL and MNEC, there will be strong demand for residential, non-residential and civil engineering construction activities but these are likely to moderate post-completion of the MNL
Retailing/Wholesale	High	High	Growth in economic activity in Corridor
Leisure & Recreational	High	High	As above
Tourism	High	High	As above

Source: Indecon analysis

Profile of Strategic Development Sites within MNEC

As part of the economic strategy we assessed the scope to develop and integrate standalone yet complementary high-value, large-scale projects within the MNEC – namely Swords-Lissenhall, Dublin Airport and Metropark – into one cohesive, competitive economic strategy that will act to maximise the overall economic development potential of the Corridor. As we believe very different issues apply to core lands in immediate proximity to Dublin Airport and the Eastlands at the airport, these are examined separately.

Summary of Indecon Assessment of Strengths and Other Issues Impacting on Development of Strategic Sites within MNEC

	Swords-Lissenhall	Metropark	Dublin Airport - Core	Dublin Airport - Eastlands
Strengths				
Proximity to Metro line	High	High	High	High
Access to service lands	High	Moderate	Low	Medium
Access to skilled population base	High	High	High	High
Potential for 3 rd /4 th level educational facilities	High	n/a	n/a	n/a
Medical health care opportunities	High	n/a	n/a	n/a
Other Issues				
Restrictions on extent of development due to height and safety zone restrictions	Low	Moderate	High	Moderate
Approved Lap in place	No**	No	Yes	Yes

Source: Indecon assessment

*Note: Restrictions will be enforced due to safety zone restrictions.

** Preparation in progress, due for release by mid 2008 by FCC.

Required Economic Development to Sustain Population Targets

The table below summarises our base case scenario for population expansion within the MNEC out to 2025 - 2030. In line with the targets set out for the Swords area in the pre-draft Swords Local Area Plan consultation document and the projections for the Greater Dublin Area set out in the Regional Planning Guidelines, a targeted population of 100,000 has been set for the Swords area and we believe this is appropriate. This would place the Swords area in the category of 'gateway' town within the context of the National Spatial Strategy and has important implications for future economic and planning policy. The economic development plan for the Metro North Economic Corridor envisages an increase in the population of the Corridor from 59,000 in 2006 to 128,100 by 2025 - 2030.

Base Case Scenario for Population within the MNEC to 2025 - 2030

Geographic Area	2006	2025 - 2030	Increase
<i>Overall Population (000's)</i>			
Swords (5 DEDs)*	38.0	100.0	62.0
MNEC less Swords	21.0	28.1	7.1
MNEC Corridor	59.0	128.1	69.1
<i>Working Age Population (000's)</i>			
Swords (5 DEDs)	29.0	80.8	51.8
MNEC less Swords	17.0	22.7	5.7
MNEC Corridor	46.0	103.5	57.5

Source: Indecon analysis based on GDA Regional Planning Guidelines/Fingal County Development Plan; 2011-2016, and CSO Regional Population Projections

*The current population figure for Swords is made up of 5 electoral districts (Swords--Forrest, Swords-Lissenhall, Swords-Glasmore, Swords-Seatown and Swords Village). If Kinsealy is included then the population is 43,288 which is similar to the figure used in the Swords Town Plan.

Our scenarios for the level of economic development of MNEC required to ensure sustainability of the corridor are focused on identifying the overall extent of employment generation required to maintain current ratios of jobs available to the projected population of working age in the corridor (as described above). Having identified the required employment creation we then consider the most optimal economic development models to achieve this employment, which we discuss in the next sub-section.

The table below sets out our *base case scenario* for required employment generation to sustain the targeted population increase in the MNEC. It is important to note that not all of these jobs will be held by residents in the Corridor and we assume a two way flow of commuters coming into the Corridor for employment who reside externally as well as a broadly equivalent number of individuals who live in the Corridor community outside for employment.

Base Case Scenario for Employment Generation Required to Ensure Sustainability of Population in the MNEC

Geographic Area	2006	2025-30	Increase 2006-2025-30
<i>Number of Jobs ('000s) Located in:</i>			
MNEC Corridor	29.6	66.7	37.0

Source: Indecon analysis based on GDA Regional Planning Guidelines/Fingal County Development Plan; 2011-2016, and CSO Regional Population Projections

Under the central case, targeting a population in the MNEC of approximately 128,100 persons by 2025-30 and assuming that the ratio of jobs to population of working age in the corridor remains stable at current levels would imply a requirement for additional job numbers in the MNEC amounting to 37,000 jobs respectively by 2025-30 compared with 2006 levels. The achievement of these outcomes would result in the numbers of jobs located within the MNEC rising to 66,700 by 2025-30 compared with the current level of 29,600 jobs. Achieving such a significant expansion in employment within the Corridor area will require both integrated local support from planners and from the private sector, and will also require the assistance of national policymakers. There needs to be significant buy-in from local, regional and national agencies to work towards achieving the future job creation targets identified for the Corridor. This is considered further in Section 10.

Economic development models

A number of specific factors should inform the selection of the most effective economic development models for the MNEC. These are summarised below and discussed in the subsequent paragraphs:

- ❑ The need to maximise employment creation focused on jobs *within* the MNEC so as to reduce leakage of skills and out-commuting to areas outside the corridor;
- ❑ A focus on targeting of high value-added economic activities in foreign-owned industry and domestically owned internationally traded services;
- ❑ Employment creation to be supported by a rapidly expanded local population possessing the specialist skills necessary to meet the requirements of business locating in the corridor; and
- ❑ Objective of Carbon Neutral City Region.

Recommendations and Delivery Strategy for Economic Development of MNEC

A summary of our recommendations in the areas of policy and planning required to realise the development potential of the MNEC are set out in the table below.

Summary of Recommendations

1.	The Economic Development Strategy for the MNEC should target the achievement of a transformational increase in the population of the Corridor to 128,100 by 2025 – 2030.
2.	In the interests of sustainability, we recommend that most of the increase in population should be concentrated in the Swords area. The area should also be the focus for significant employment growth.
3.	The Development Strategy should facilitate commercial and other development in the Corridor that would support a total of 37,000 additional jobs in the corridor to a total of 66,700 representing a more-than-doubling of the existing level of economic activity and employment in the area.
4.	The Development Strategy should attract a range of high-tech manufacturing and services employment to the Corridor.
5.	Key sectors which should be targeted for MNEC include corporate head offices, IT services, financial and business services and science and technology projects, and environmental products and services.
6.	Fingal County Council (FCC) should strongly support proposals for a University Campus in MNEC.
7.	Measures to facilitate the establishment of a hospital within the Corridor should be pursued as a priority.
8.	The focus of core Dublin Airport lands should be on airport activities.
9.	To support the desired increase in population and employment in the MNEC, the Swords-Lissenhall, Dublin Airport Eastlands and Metropark sites should each be targeted for future development.
10.	As well as allowing for residential development, potential non-residential uses for the Swords-Lissenhall site should include third-level education, healthcare, high tech sectors and services.
11.	For Dublin Airport Eastlands, future development should be concentrated in high-value services.
12.	Development at the Metropark site should be concentrated in high-technology manufacturing, science and technology as well as other high-value services.
13.	The delivery of the MNEC Development Strategy should be driven by Fingal County Council with the active cooperation and support of all relevant public and private partners. The feasibility of a more permanent co-ordination structure for investment in the area should be examined.
14.	Investment in supporting road infrastructure, services infrastructure and in social infrastructure to accommodate the expansion in the population in the Corridor must be implemented.
15.	The targeting of the Metro North Economic Corridor by the development agencies to assist the attraction and expansion of indigenous and foreign firms will be essential to the expansion of high skilled employment.
16.	A skills strategy should be prepared to support the proposed economic strategy for MNEC.
17.	Development contributions and other charges by Fingal County Council should be designed to attract appropriate high skilled employment in selected sites.
18.	New developments in the Corridor should meet best international practice in environmental standards for all new commercial and residential buildings.
19.	We recommend that higher densities for selected areas within the MNEC should be approved to facilitate the rapid expansion of population.
20.	Consideration should be given to special planning approaches to accelerate development within the Corridor.
21.	Major targeted marketing and branding investment should be introduced to promote the Corridor as a high skilled Airport City Region.
22.	The Steering Committee overseeing the Economic Development Strategy should, as a priority task, agree on a detailed timeline for delivery of key actions under the Strategy.

Source: Indecon

Conclusion

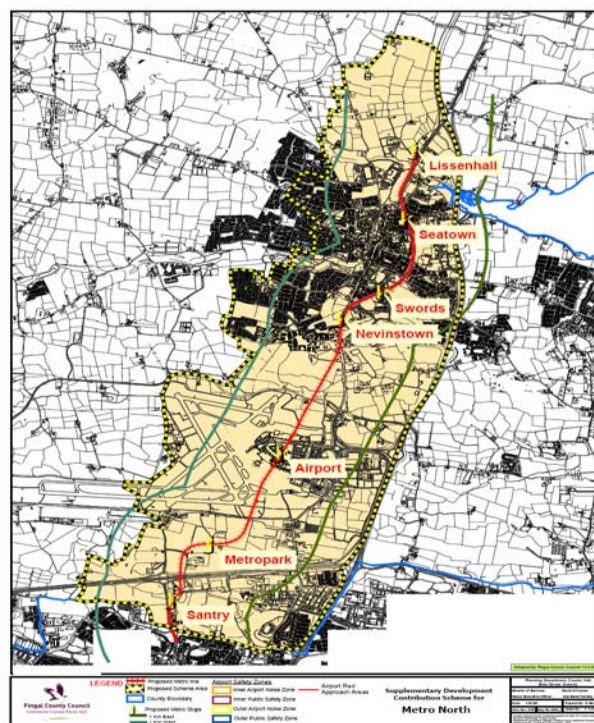
The proposed economic development strategy for the Metro North Economic Corridor includes a transformational shift in both the rate of growth and the composition of economic activity. The plan envisages an increase in population from 59,000 in 2006 to 128,100 by 2025-30 and an increase in employment from 29,600 to 66,700. Achieving this will be a major challenge and will require innovative policy initiatives. The proposed strategy is, however, essential for the sustainable economic development of the Corridor and to ensure the maximum economic benefits are derived from the major investment in the Metro North rail link.

Summary of Main Findings and Recommendations

Introduction and Background

This report is submitted to Fingal County Council by Indecon International Economic Consultants. Valuable inputs to Indecon’s analysis were also received from RPS Consultants and Bone Wells Associates who co-operated with Indecon on this assignment. The report concerns the formulation of an Economic Development Strategy for the Metro North Economic Corridor (MNEC), which is part of the Fingal County Council area. The definition of the Metro North Economic Corridor is the area of land that is approximately 1 kilometre on either side of the proposed Metro North Light Rail line. This extends from North of Swords at Lissenhall to the South Fingal area and incorporates Swords, Dublin Airport and Metro Park. Figure 1.1. below represents a geographical presentation of this defined area. From an economic perspective this includes 11 electoral districts which are either fully or partially included within the Corridor Area. It is envisaged that the implementation timeframe for the strategy would be of the order of most of the development being completed by 2025 – 2030 period subject to infrastructural provision.

Schematic Outline of Proposed MNEC



Source: Fingal County Council (Supplementary Development Contribution Scheme for Metro North).
Note: The route of the MNL is shown as the red rail line. The MNEC is the lightly shaded area.

The Economic Development Strategy is required by Fingal County Council to identify, specify and prioritise the potential levels of economic footprint, commercial activities, competencies and labour skills and services that will be required to sustain the growing communities and businesses located within and adjacent to the MNEC.

This strategy is designed to deliver a fundamentally changed vision for the development of Swords and the wider MNEC, which will coincide with the delivery of major infrastructure investment, including in particular the Metro North Light Rail (MNLRL). The strategy will play a central role in shaping other economic development and planning strategies for Fingal in the future, including the new Swords Town Area plan, which is under preparation by Fingal County Council. The strategy is also designed to ensure the maximum economic benefits are derived from the government's investment in the Metro North Light Rail, thereby maximising value for money.

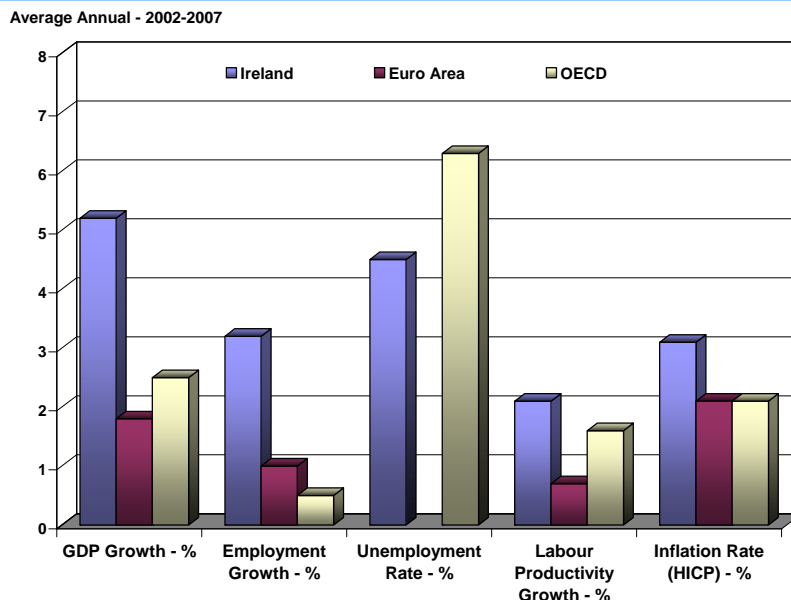
Economic, Policy and Land Use Context

The context for the formulation of the economic development strategy for the MNEC is influenced by wider developments outside the immediate area of the corridor. The strategy therefore considered the key international and national economic developments and trends, in addition to the planning context and the current land-use patterns and surface access infrastructure serving the MNEC area. In relation to *economic developments*, we firstly reviewed the context for Ireland in terms of the key developments internationally, including at European level. The key developments and trends include the following:

- ❑ A changing world economic and investment climate characterised by the rapid growth of emerging economies, energy demand reaching record levels, ongoing globalisation and increased competition for mobile foreign direct investment (FDI).
- ❑ At European level, the expansion of the European Union, which has led to an increase in competition for FDI from new Member States in Central and Eastern Europe and changing migration patterns. The Lisbon agenda is shaping economic policy with the objectives of boosting competitiveness, productivity and innovation.
- ❑ At global level the climate change issue, which is resulting in changes to energy and environment policies, reflecting an increased demand for alternative energy sources and new environmentally-friendly technologies.
- ❑ Turbulence in international financial markets and concerns of a possible recession in the US economy.

At a national level, growth in the Irish economy has been very strong over the last decade both in terms of the volume of economic output, growth in employment numbers and productivity (see chart below). This performance compares exceptionally well with that of Ireland's main trading partners, although growth has now moderated significantly.

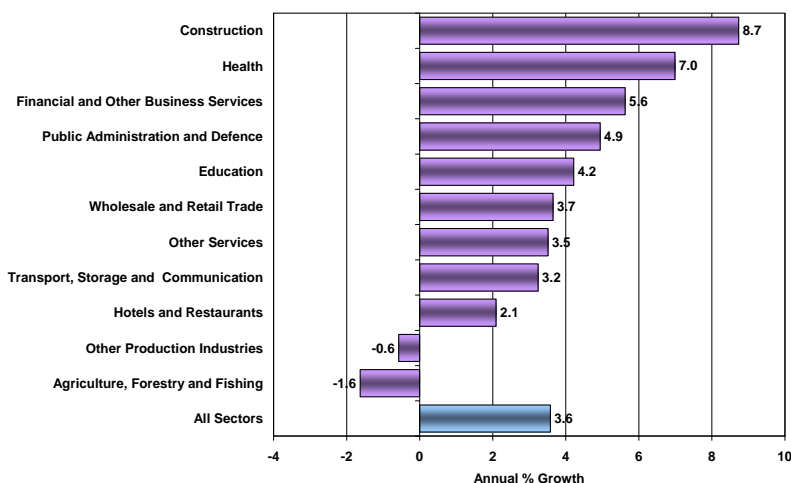
Irish Economic Performance in a Comparative Context



Source: Indecon analysis based on data from CSO and OECD

At a sectoral level in the Irish economy, the services sector – and particularly the financial & business services, health, education, and other services sub-sectors – continues to dominate overall job creation and has accounted for the largest proportion of employment generated over the last 5-10 years (see chart overleaf). This has important implications for the economic development of the Metro Corridor. By contrast, traditional manufacturing sectors have experienced decline. Activity in the construction sector is declining from the record levels of activity seen over the last 5-10 years and this adjustment is likely to result in more modest growth in the economy overall over the short to medium term. The main implication of this analysis is that employment growth going forward is likely to continue to derive primarily from the services sector, including the internationally traded and domestic services activities. Construction will remain an important sector but its overall contribution to employment generation is likely to decline significantly. These sectoral features influence the identification of growth drivers within the context of the Economic Development Strategy for the MNEC.

Sectoral Composition of Employment Growth – Average % Change - 1998-2007*



Source: *Indecon analysis of CSO, Quarterly National Household Survey, * Q3 1998 – Q3 2007*

Policy and planning context

In relation to the policy and planning context, a number of national, regional and local level plans shape the overall policy and planning context for this economic development strategy for the MNEC. At national level these include the National Spatial Strategy, the National Development Plan and Transport 21. At regional level, key documents include the Regional Planning Guidelines for the Greater Dublin Area and other strategy documents such as plans from the Dublin Transportation Office. National plans have also influenced the formulation of key strategies and frameworks at local levels, most notably the Fingal County Development Plan. The policy context highlights the importance of Dublin Airport and the broader MNEC area as a critical economic driver, both for the capital and the State generally. Assisting the development of Dublin Airport as a critical national infrastructure must guide the overall framework for the Metro North Economic Corridor.

Current Land-Use Patterns and Surface Access Approaches

An examination of current land-use patterns and surface access approaches impacting on the MNEC area highlights a number of land banks, which are particularly relevant to the Corridor, including lands to the south of the M50; lands north of the M50 and south of the Designated Airport Area, including Metropark; the Designated Airport Area around Dublin Airport and the Eastlands land bank owned by DAA and other landowners; a Greenbelt area located to the north of the Designated Airport Area and to the south of Swords; the Swords area (including southern fringe, town centre area and the northern fringe); and the Lissenhall area to the north of Swords.

Each of these areas of land banks will be important for the economic development of the Corridor and particularly Swords-Lissenhall, the Dublin Airport Eastlands area, and the Metropark. Each area has various degrees of prospective usage and development potential going forward which are dictated to a large extent by the scale of the areas concerned and future planning regarding densities and types of development which are appropriate.

The MNEC is currently well served in terms of road access, although specific major developments, including the planned IKEA store in Ballymun, are likely to have significant implications for the road network in the area. In relation to public transport, a range of bus services currently serve the MNEC area. The Metro North Light Rail and planned road infrastructure will significantly enhance access to Dublin Airport and the linkages between the MNEC and other parts of Ireland.

Investment and Economic Snapshot of MNEC

A detailed analysis of the economic structure, employment status and skills base of the MNEC has been undertaken, including extensive analysis of new empirical evidence on the Corridor. The assessment also outlined the investment situation in relation to IDA-supported companies in the Corridor and provided a case study on the region's largest industry – aviation.

The table below highlights the current level and recent growth in the population of the MNEC in a comparative context, highlighting the fact that the Corridor area has experienced very rapid population expansion, amounting to an increase of almost one-third between the last two censuses. This rate of increase in population in the Corridor has substantially exceeded that recorded in Fingal and Dublin as a whole, and the State over the period since 2002.

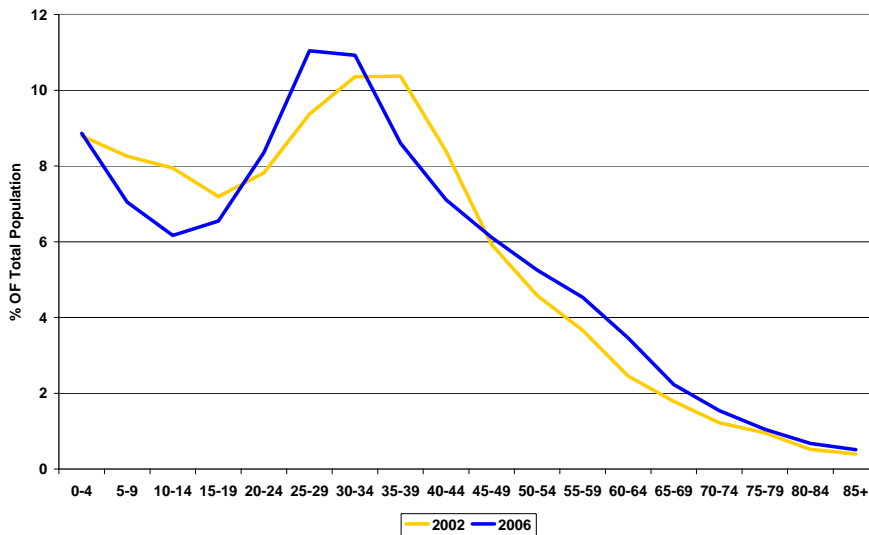
Population of Selected Areas in 2002 and 2006

Location	2002	2006	% Change
MNEC	44,303	58,880	32.9
Fingal	196,413	239,992	22.2
Dublin City	495,781	506,211	2.1
State	3,917,203	4,239,848	8.2

Source: Indecon Analysis of CSO Census of Population Data.

The figure overleaf highlights the age profile of the population of the MNEC, comparing the position in 2006 with that in 2002 and highlighting the younger age cohort within the 20-35-age group which has grown in size between 2002 and 2006 relative to the population as a whole in the Corridor. This represents a strength for the MNEC in terms of the availability of a young labour force.

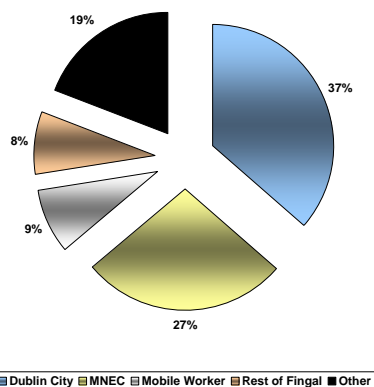
Age Distribution of MNEC Population, 2002 and 2006



Source: Indecon analysis of CSO Census 2006 Data (SAPS)

In terms of MNEC residents, nearly 70% of the population over 15 is at work. The figure overleaf highlights the breakdown of residents in the MNEC according to their place of work in 2006. It is notable that a majority of MNEC residents who are currently employed, work outside the Corridor, with the largest single segment (37%) travelling to work in Dublin City. Other work destinations include the rest of Fingal (8%), while 9% are mobile workers. Overall, 73% of MNEC residents work outside of the Corridor which in part reflects the fact that the Corridor has not yet developed a sufficient base of high skilled value added employment. Ensuring that high skilled employment opportunities are provided for existing residents and for the projected increase in residents in the Corridor is a key objective of our proposed economic development strategy for the Corridor.

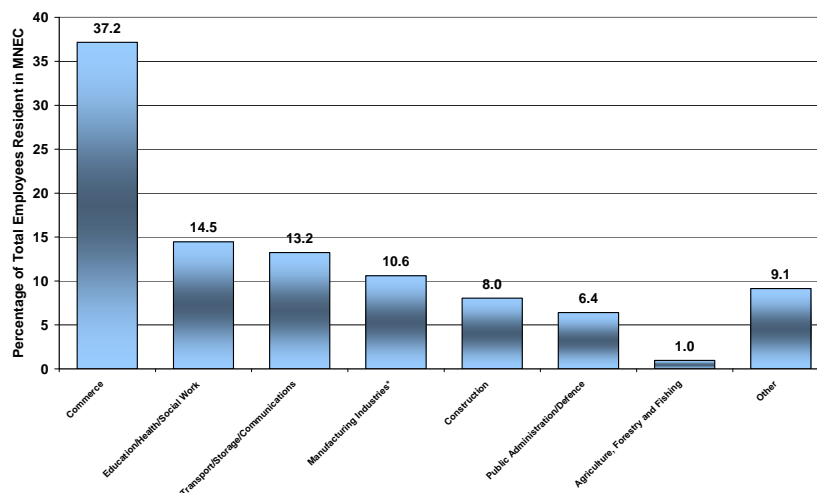
Breakdown of Residents in the MNEC by Place of Work, 2006



Source: Indecon analysis of CSO Census 2006 Data (POWCAR)*

Some residents of the MNEC are employed within the area while others travel to work outside the Corridor. The sectoral breakdown of employment for these two categories of residents are analysed in the following two bar charts. The first figure below indicates the breakdown of employees resident in the MNEC by the sector of their employment in 2006. Among employed persons who reside in the Corridor (regardless of the location of their work), the largest proportion work in commerce.

Breakdown of Employees Resident in the MNEC by Employment Sector, 2006

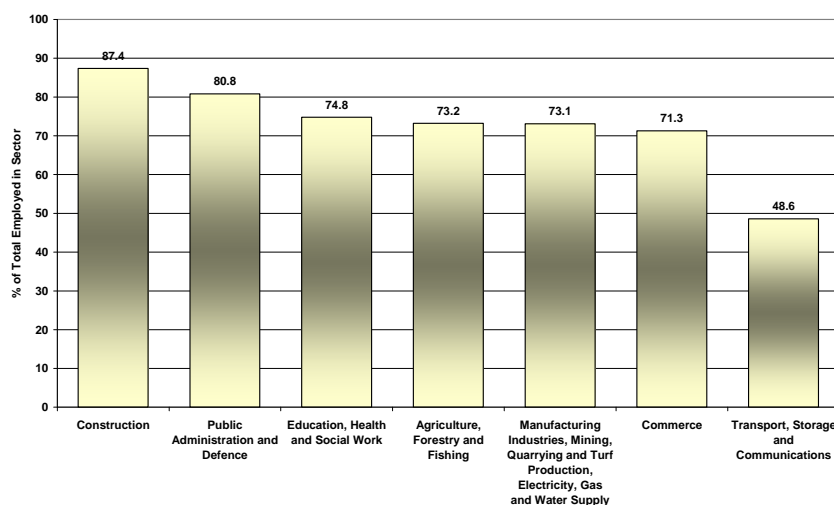


Source: Indecon analysis of CSO Census 2006 Data (POWCAR)

* It should be noted the POWCAR estimate of employment by place of work in the MNEC area does not include persons in respect of whom place of work was not indicated or was not sufficiently clear for coding purposes (7 per cent nationally), mobile workers with no fixed place of work (11 per cent nationally), persons who work from home (6 per cent nationally).

The figure below illustrates the proportion of MNEC residents who work outside the Corridor according to their sector of employment. This shows that there is a significant skill base within the Corridor which would facilitate expanded employment in the area.

Proportion of MNEC Residents Working Outside the Corridor by Sector of Employment, 2006



Source: Indecon analysis of CSO Census 2006 Data (POWCAR)

The rate of employment outside of the MNEC is particularly high in the services sector including in public administration. Transport, Storage and Communications is the area where a majority is employed within the Corridor, which is likely to reflect the location within the Corridor of Dublin Airport.

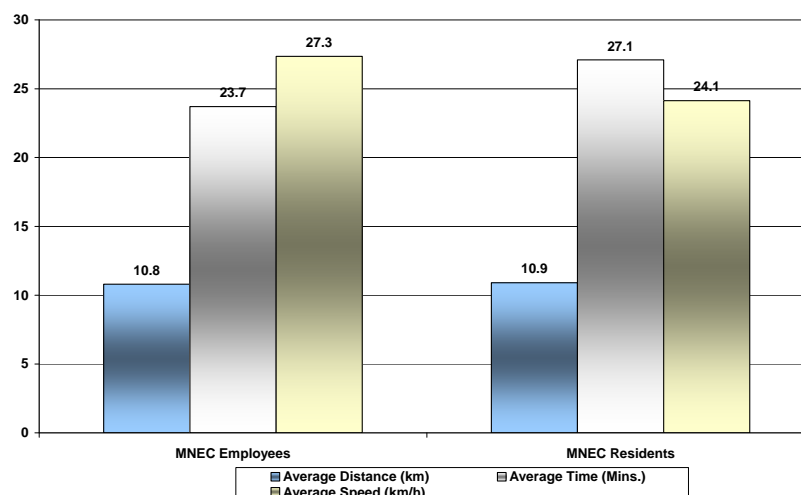
The figure overleaf compares the travel-to-work times and distances of MNEC residents with those employed in the MNEC. The average distance to work is broadly similar at around 10 kilometres. However, the journey to work takes a longer time for MNEC residents compared with MNEC employees. This analysis has important implications for the economic strategy and vision of the Corridor.

Vision for MNEC

The reduction in commuting and environmental benefits of the proposed economic strategy will further enhance value for money impacts from the investment in the Metro.

The development framework and vision for the MNEC has been designed to assist in maximising the availability of high value employment opportunities within the Corridor so as to minimise outbound commuting and skills leakage and to reduce the environmental impacts of the expansion in population. This is also required for effective planning and to ensure two way usage of the Metro North rail link which is a requirement to maximise the value for money of this important investment.

Travel-to-Work Times and Distances - MNEC Employees and Residents, 2006



Source: Indecon analysis of CSO Census 2006 Data (POWCAR)

In examining the economic characteristics of the MNEC it is important to review employment in the area including jobs held by residents and non residents. The table below indicates the breakdown of the number of persons employed within the MNEC according to sector of employment. Transport, storage and communications, and commerce and trade are the largest industrial sectors of employment within the MNEC currently.

Industrial Sector Breakdown of MNEC Jobs, 2006

Industrial Sector	MNEC	% of Total	Fingal	% of Total	Dublin City and County	% of Total	State	% of Total
Transport, Storage and Communications	9,325	31.3	11,726	16.2	39,007	7.7	79,240	5.4
Commerce	8,846	29.7	24,561	33.9	206,274	40.8	467,449	31.8
Manufacturing Industries, Mining, Quarrying and Turf Production, Electricity, Gas and Water Supply	3,905	13.1	11,971	16.5	53,243	10.5	234,435	16.0
Education, Health and Social Work	2,475	8.3	9,940	13.7	94,044	18.6	286,495	19.5
Public Administration and Defence	1,442	4.8	6,349	8.8	50,298	9.9	159,060	10.8
Construction	1,336	4.5	3,121	4.3	39,931	7.9	90,080	6.1
Agriculture, Forestry and Fishing	172	0.6	4,157	5.7	21,796	4.3	85,175	5.8
Other	2,299	7.7	683	0.9	1,274	0.3	65,835	4.5
Total	29,800	100	72,508	100	505,867	100	1,467,769	100

Source: Indecon Analysis of CSO 2006 Data (POWCAR)

The table below describes the residence of persons who hold jobs located within the Metro North Economic Corridor. The largest proportion of people working in the Corridor (49.4%) resides in Fingal. The second most common residential location for Corridor workers was Dublin City (25%). It is notable that only 28% of persons who are employed in the Corridor actually live in the Corridor.

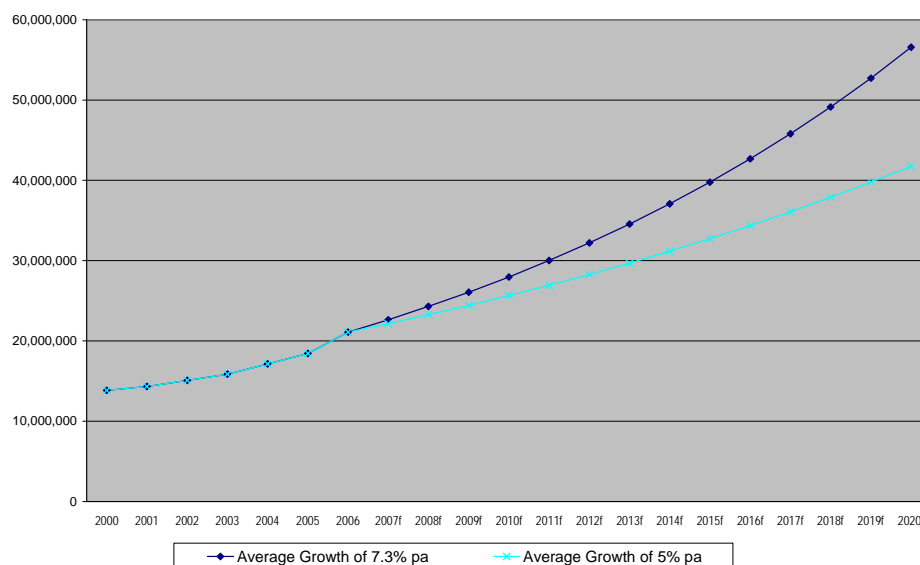
Place of Residence of Persons Employed in the MNEC

Region	Number	% of Total
MNEC	8,299	27.6
Dublin City	7,515	25
South Dublin	1,394	4.6
Fingal	14,834	49.4
Dún Laoghaire-Rathdown	609	2
Louth and Meath	4,073	13.6
Other Regions	1,600	5.3
Total	30,025	100

Source: Indecon Analysis of CSO 2006 Data (POWCAR)

Given the importance of Dublin Airport for employment in the Corridor, it is useful to review developments at Dublin Airport in more detail. The figure below highlights the recent trends in and projections for passengers using Dublin Airport out to 2020. This shows the recent very rapid growth recorded in passenger numbers and the prospects for further strong growth, underlying the importance of this critical infrastructure, both for the MNEC and the country as a whole.

Projection of Total Passenger Numbers at Dublin Airport to 2020



Source: Indecon analysis of Dublin Airport Authority (DAA) Annual Reports

The Metro North Economic Corridor has significant strengths and potential for sustainable economic development. Particular strengths of the MNEC, which, *inter alia*, shape the formulation of the Economic Development Strategy for the Corridor, are highlighted below. The existing base of economic activity is not, however, sufficient to accommodate the rapid growth in population envisaged for the Corridor. There is therefore a need for a significant change in the scale and composition of the economic base in the Corridor.

Summary of Key Strengths of MNEC Area

- Metro North rail link
 - A high employment rate
 - A low dependency rate (retired, unable to work and students)
 - A relatively large portion of people in the 25-44 years demographic category
 - Available labour/skills pool within the workforce with relatively high educational attainment
 - Location within MNEC of Dublin Airport
 - Access to national and international markets by virtue of road network,
 - Proximity to major seaports including Dublin Port and the proposed Braemore Port
 - Existing base of foreign and indigenous firms
 - Planned critical mass of population
 - Access to major 3rd/4th-level institutions in North Dublin/Dublin area
 - A high Quality of Life in the area
-

Source: Indecon analysis

The recommended economic development strategy for the MNEC involves a radical transformation of economic activity in the Corridor to provide higher value jobs within the region. As part of the Economic Development Strategy, we envisage there to be a mix of science and technology (ICT and biotechnology, which are the key sectors being targeted by SFI), professional and business services, environmental services and leisure, recreational and tourist services. As indicated subsequently we also believe there is significant opportunities for the MNEC in relation to a potential university campus and a potential new hospital. Airport related activities will also continue to be of importance for the Corridor. These activities are considered in more detail when we examine proposed strategic sites within the MNEC (Swords, Metropark and Dublin Airport Eastlands).

Review of National and International Best Practice Approaches

In formulating the MNEC Economic Development Strategy detailed consideration was given to national and international best practice approaches and models of economic corridor development which could inform the development of the strategic sites within the MNEC.

Our proposed development strategy takes account of best practice approaches as well as our review of international, European and national economic developments and the economic snapshot of the MNEC. This facilitates the identification of what economic sectors could be realistically attracted to the strategic sites within the Corridor. Our review of best practice models has considered airport-related development (including the 'airport city' concept), science and technology-related development and education and research-related development and healthcare.

Airport-Related Development

Given the location of Ireland's main airport within the Corridor, it was important to consider airport related development as part of the strategy for the Corridor. It is clear that the effective and efficient development of Dublin Airport must be a core element of any strategy for the Corridor. In addition, with regard to airport-related development, recent years have seen the emergence of the concept of the 'airport city', a form of business cluster developed around an airport, serving to attract a mix of economic activities (including science and technology, office/commercial, hotels and entertainment as well as aviation-related services). Schiphol Airport in Amsterdam is a pioneering example of an airport city and we considered the implications of this for what could be achieved in the context of Dublin Airport and the wider Corridor area. Various other examples of airport cities were also considered – each illustrating a unique development path and characterised by different issues and legacies.

In terms of the 'attractors' for firms considering locating next to an airport, our review of the evidence suggests that the following factors are important for airport-related development and are relevant in the context of the entire Corridor area:

- ❑ The availability of an efficient, integrated and dynamic transport system, including road, bus and rail, between the airport city/corridor and the major population catchment area/city;
- ❑ The opportunity for businesses considering locating in the airport city region to source skilled labour (who can be readily adapted to particular areas of comparative/competitive advantage) within and adjacent to the region;
- ❑ Competitive rents (internationally and in relation to other suburban areas which may compete with the airport city/region as a host area for inward investment and business start-ups).

Indecon believes that there is potential for the MNEC as a whole to develop the beneficial aspects of an airport city region. Our case study review illustrates that airport city development is not necessarily the preserve of international hub airports; the experience of certain European airports, such as Dusseldorf, Munich and Vienna, suggest that the airport city concept has the potential to develop in point-to-point (spoke) airports, of which Dublin Airport is an example. However, we are of the view that development of the Corridor as an airport city region should be planned in a manner which gives priority to the efficient development of the airport as a core national infrastructure. We would also advise against restricting the definition of appropriate activities to those which intensively use the airport or are directly linked with the airport.

Science and Technology-High Skilled Services

As indicated previously our economic analysis of the Corridor indicates that there is a need for a major enhancement of the level of value added and skills of employment within the Corridor and we believe this must include science and technology and high skilled services. We have considered both national and international best practice models which may appropriately inform the development of the MNEC.

As part of our review of national best practice we considered Sandyford and City West development. A summary of the Sandyford experience is presented below.

In Sandyford, the two most rapidly sectors in terms of employment during 2001 and 2007 were transport, storage and communication and financial and insurance services sectors. Other sectors demonstrating strong growth performance over the period were business services. In terms of the number of enterprises within the Sandyford Industrial Estate, financial and insurance services registered the most rapid growth during the period. During the 2001-2007, the role of manufacturing within Sandyford has fallen and the main sector of employment in 2007 is services.

The Sandyford and City West models present a number of characteristics of relevance to the proposed development of the MNEC, namely:

- To date employment growth in both Sandyford and City West Industrial Estates has been largely dominated by high value services;
- The location of Sandyford is linked to the city centre by means of the green line LUAS transport node.

As part of our review of international best practice we considered Kista Science City in Sweden and Turku Science Park in Finland. A summary of the Kista Science City is presented below.

Kista Science City, Sweden is located 15 minutes from Stockholm Arlanda Airport, which is comparable in size with Dublin Airport, and 15 minutes from Stockholm's Central Station by (underground) railway (similar to the proposed Metro North, which will comprise underground segments). It is also situated in close proximity to Sweden's financial centre in central Stockholm and is strategically well placed to take advantage of biomedical developments continuing apace to the north in the Uppsala region. The focus of Kista Science City lies primarily in ICT, electronics, global IT and telecoms. The City has evolved over the course of 35 years and by the end of the 1980s (within a decade after the metro line was completed) had already been earmarked as Sweden's 'Silicon Valley'. Presently, some 120,000 people live in KSC, 4,000 of which study at Uppsala University. In total, the City employs 65,000 people (of which 19,942 are in ICT alone). Kista is internationally recognised as a world-leading wireless cluster. Kista has also developed an international comparative advantage in broadband, mobile communications and multimedia and has developed strong links with research institutions within the region, including the nearby university.

Environmental Technology/Products/Services

There is potential for significant growth in economic activities involving green technologies in response to increased consumer awareness as well as regulatory and other changes reflecting the economic costs of harmful emissions. Within the Irish market there will be increased commercial opportunities arising from environmental awareness and these will be stimulated further by the recent changes announced in the 2008 Finance Bill. Possibly even more significant is the fact that the European and international markets for green technologies and for green consumer goods is likely to demonstrate rapid growth. These products and technologies involve the use of renewable industrial feedstocks and reduced levels of waste and energy consumption and high levels of recycling.

The range of potential green products and technologies is extensive. As an illustration such products range from technical products such as green film coating technologies to aircraft exterior paints, windows which automatically change with sunlight, advanced coatings to increase life cycle of fluorescent lamps, to a wide range of consumer and industrial products. In addition there will be opportunities in environmental services.

The commercial opportunities arising from the growth in demand for such products/services offers the Corridor economic opportunities. Supporting initiatives to assist in securing the opportunities in environmental opportunities could include targeted research to investigate specific sources of green related high value employment, consideration of the feasibility of a green technology venture capital fund possibly in association with Enterprise Ireland and financial institutions and the development of environmental businesses clusters. Also of possibly greater importance is that as the Corridor will be one of the first major new towns/cities in Ireland, it could play a leadership role in this area, if it develops as a carbon neutral city with best practice in environmental sustainability. This would provide the Corridor with competitive advantages as a location for clusters of environmental products/services.

University Campus

The Metro North Economic Corridor represents an excellent location for education related development. Developing a new campus within the Corridor has significant potential. The drivers of this potential development include capacity issues at existing colleges, adoption of international best practices and the attraction that would be afforded by having a new campus located close to a metro stop. The realisation of such a new campus would have significant development and marketing potential for the Corridor and Indecon would recommend Fingal County Council to work with existing challenges to support this proposal. We have examined a number of best practice models for educational-related developments including Centennial Corridor in North Carolina.

Centennial Campus in North Carolina is a research and advanced technology community built on a total of 1,334 acres, comprising the 1,120 acre Centennial Campus and the 214 acre Centennial Biomedical Campus. It was awarded the 'Outstanding Research Science Park 2007' by the US Association of University Research Parks. At present, it employs 1,600 corporate and government employees, 1,350 university staff and post docs and 3,400 university students, with significant expansion in these numbers planned over the coming years. To date, €620 million has been invested in facilities and infrastructure to sustain the Campus, occupying 2.7 million sq ft of space constructed across 25 major buildings. A new university campus would provide exciting economic opportunities within the MNEC.

Hospital/Health Care Infrastructure

Indecon has considered the existing and planned provision of hospital/medical services in the State, in view of the possibility of a hospital or other health care facilities locating within the Corridor. The Metro North Corridor is in our view an appropriate location for such health care facilities and there may be potential for a private hospital within the Corridor. Health care infrastructure in the Corridor would enhance the attractiveness of the Corridor and also provide a major source of

high skilled employment and economic activity.

It is likely that future health needs of the Corridor population will increase the demand for hospital and medical care to ‘high’ within the MNEC. Currently, the main hospital serving the needs of the MNEC and east Fingal is Beaumont Hospital, with Our Lady of Lourdes Hospital in Drogheda serving parts of north Fingal and the North East of the country. As the population of the Corridor expands rapidly, we envisage a corresponding requirement for a hospital facility to serve the needs of the MNEC. A hospital would also provide important linkages with medical education and training and with research and development activities.

Opportunity for Future Knowledge-Based Industries in the MNEC

We considered the appropriate pattern of future economic activities within the Corridor to 2025-30 and these are described in the figure overleaf. These highlight the importance of science and technology industries, knowledge based services, environmental technologies/products and services, higher education, health care and other activities including airport related employment.

Indecon Assessment of Potential Current and Future Demand for Knowledge based Industries in the MNEC (2007-2025-30)

Summary of Indecon's Assessment of Potential Current and Future Demand for Economic Activities in the MNEC			
	Current Demand	Future Demand	Drivers
Knowledge-Based (S+T) Industries			
Biotechnology	Low-Moderate	Moderate-High	Investment into Corridor, improved transport, skilled labour, national and international trends, SFI sector (mix of foreign and domestic)
ICT	Low-Moderate	Moderate-High	As above
Micro-electronics	Low-Moderate	Moderate	Investment into Corridor, improved transport, skilled labour, national and international trends (mainly foreign)
Medical Devices	Low-Moderate	Moderate	As above
Aerospace Equipment	Low-Moderate	Low-Moderate	No tradition of manufacturing in MNEC
Knowledge-Based Services			
Financial & Insurance Services	Low	High	Investment into Corridor, need to ensure greater competitiveness, attractive location (mainly domestic)
Professional Services (Business & Legal)	Low	High	As above
Public Sector	Low	Moderate	Greater levels of economic activity will necessitate a raised level of demand for administrative services
Environmental Technologies/Products/Services	Moderate	High	Consumer awareness, regulatory, economic and fiscal changes
Higher Education			
Third-Level Education (undergraduate and largely-taught masters degrees)	Low	High	Knowledge-based industries, upskilling of general population
Fourth-Level (research masters and doctoral degrees)			
Hospital	Moderate-High	High	MNEC rapidly growing population centre; demand also from east/coastal Fingal County
Other Activities			
Aviation & Transport Logistics	Moderate-High	Moderate-High	Growth in demand for passenger and air cargo services
Construction Services	Moderate-High	Moderate	During the development of the MNL and MNEC, there will be strong demand for residential, non-residential and civil engineering construction activities but these are likely to moderate post-completion of the MNL
Retailing/Wholesale	High	High	Growth in economic activity in Corridor
Leisure & Recreational	High	High	As above
Tourism	High	High	As above

Source: Indecon analysis

Profile of Strategic Development Sites within MNEC

As part of the economic strategy we assessed the scope to develop and integrate standalone yet complementary high-value, large-scale projects within the MNEC – namely Swords-Lissenhall, Dublin Airport and Metropark – into one cohesive, competitive economic strategy that will act to maximise the overall economic development potential of the Corridor. As we believe very different issues apply to core lands in immediate proximity to Dublin Airport and the Eastlands at the airport, these are examined separately.

Our analysis considered the strengths and weaknesses of the strategic sites taking account of relevant national and international best practice models, which Indecon believes are appropriate to meaningfully informing the Economic Development Strategy of the MNEC. We then identified the potential opportunities in each site, commenting on the mix of possible economic sector. In relation to the current profile of the key strategic sites, a summary of Indecon’s assessment of the main strengths and other issues impacting on the potential future development of each site is presented below.

It is important to note that there will be timing issues in realising the potential of certain land banks and the Metro North Rail Link, SWRR, water and sewerage capacity and other infrastructure will not be available until 2012 – 2014.

Summary of Indecon Assessment of Strengths and Other Issues Impacting on Development of Strategic Sites within MNEC

	Swords-Lissenhall	Metropark	Dublin Airport - Core	Dublin Airport - Eastlands
Strengths				
Proximity to Metro line	High	High	High	High
Access to service lands	High	Moderate	Low	Medium
Access to skilled population base	High	High	High	High
Potential for 3 rd /4 th level educational facilities	High	n/a	n/a	n/a
Medical health care opportunities	High	n/a	n/a	n/a
Other Issues				
Restrictions on extent of development due to height and safety zone restrictions	Low	Moderate	High	Moderate
Approved Lap in place	No**	No	Yes	Yes

Source: Indecon assessment

*Note: Restrictions will be enforced due to safety zone restrictions.

** Preparation in progress, due for release by mid 2008 by FCC.

An indicative breakdown of the potential location of economic activities across each of the strategic sites is presented below. This highlights the range and mix of high value-added and high income employment generation opportunities that we believe would leverage existing strengths to maximize the overall economic development potential of the MNEC in a way which ensures sustainability of the planned population expansion for the Corridor.

It should be noted that these represent indicative potential locations and a degree of flexibility should be kept for key areas of potential including higher education, the potential hospital project, foreign direct investment and internationally traded services.

Indicative Breakdown of Potential Focus of Economic Development in Strategic Sites in MNEC

Strategic Site	Key Economic Activities
Swords/ Lissenhall	1. Higher education - new third/fourth-level campus at Lissenhall (with high quality research and possibly new business/management school)
	2. Hospital and Health - new private hospital and ancillary services
	3. Biotechnology park at Lissenhall and/or Lissenhall Great (SFI-sponsored sector and build on DCU's existing strengths in this area)
	4. ICT park at Lissenhall and/or Swords Business Park (SFI-sponsored sector and build on DCU's existing strengths in this area)
	5. Financial and insurance services - Lissenhall, Lissenhall Great, Swords Business Park, other town centres sites
	6. Environmental Services
	7. Professional services (business, legal etc.) - Lissenhall, Lissenhall Great, Swords Business Park, other town centres sites
	8. Public sector services - Lissenhall Great, other town centres sites
	9. Retailing - Various sites including Town Centre, Airside, Swords Business Park
	10. Leisure and recreational - Lissenhall, Lissenhall Great and town centre sites
	11. Tourism - Lissenhall and town centre sites (e.g. Swords castle)
Metropark	11. International and other high value-added services
	1. Science and technology park (particularly biotechnology and ICT - SFI-sponsored sectors)
	2. Other science and technology (micro-electronics and medical devices)
	3. Environmental services
	4. Leisure and recreational
Dublin Airport - Core	5. International and other high value-added services
	1. Aviation infrastructure (as provided in the Dublin Airport LAP)
	2. Transport and logistics (serving Dublin Airport)
Dublin Airport - Eastlands	3. Airport related services
	1. High-end office development in commercially zoned site. Focus on high-value services.
	2. Environment services

Source: Indecon

Note: 'Lissenhall' refers to the 200 ha site north of Swords; 'Lissenhall Greater' to the 36.5 ha site in Swords overlooking the Malahide Estuary.

Evaluation of Economic Development Strategy for MNEC

Having assessed the existing position of the MNEC and considered the scope to develop strategic sites identified by Fingal, in the formulation of an Economic Development Strategy for the Corridor we identified the extent and sectoral mix of economic development (and particularly employment growth) required to sustain a planned population expansion within the area over the next 20 years. Related to this, we identified the nature and potential impact of risks surrounding the achievement of the desired level of economic development. The strategy involves a transformational shift to develop significant high value-added economic activity in the Corridor area, with Dublin Airport as a core element. This strategy is needed to maximise the economic benefits of the Metro North Light Rail link and to ensure a usage of the rail link in both directions, and to provide an environmentally sustainable economic plan for the Corridor area.

Required Economic Development to Sustain Population Targets

A key factor shaping the Economic Development Strategy for the MNEC concerns the implications of planned population expansion within the Corridor area. The approach applied in the formulation of the strategy entailed the consideration of existing planning and policy documents issued by Fingal County Council together with the CSO's Regional Population Projections for the Greater Dublin Area to develop a range of long-run scenarios for population expansion within the MNEC.

The table overleaf summarises our base case scenario for population expansion within the MNEC out to 2025 - 2030. In line with the targets set out for the Swords area in the pre-draft Swords Local Area Plan consultation document and the projections for the Greater Dublin Area set out in the Regional Planning Guidelines, a targeted population of 100,000 has been set for the Swords area and we believe this is appropriate. This would place the Swords area in the category of 'gateway' town within the context of the National Spatial Strategy and has important implications for future economic and planning policy. The economic development plan for the Metro North Economic Corridor envisages an increase in the population of the Corridor from 59,000 in 2006 to 128,100 by 2025 - 2030.

Base Case Scenario for Population within the MNEC to 2025 - 2030

Geographic Area	2006	2025 - 2030	Increase
<i>Overall Population (000's)</i>			
Swords (5 DEDs)*	38.0	100.0	62.0
MNEC less Swords	21.0	28.1	7.1
MNEC Corridor	59.0	128.1	69.1
<i>Working Age Population (000's)</i>			
Swords (5 DEDs)	29.0	80.8	51.8
MNEC less Swords	17.0	22.7	5.7
MNEC Corridor	46.0	103.5	57.5

Source: Indecon analysis based on GDA Regional Planning Guidelines/Fingal County Development Plan: 2011-2016, and CSO Regional Population Projections

*The current population figure for Swords is made up of 5 electoral districts (Swords--Forrest, Swords-Lissenhall, Swords-Glasmore, Swords-Seatown and Swords Village). If Kinsealy is included then the population is 43,288 which is similar to the figure used in the Swords Town Plan.

Our scenarios for the level of economic development of MNEC required to ensure sustainability of the corridor are focused on identifying the overall extent of employment generation required to maintain current ratios of jobs available to the projected population of working age in the corridor (as described above). Having identified the required employment creation we then consider the most optimal economic development models to achieve this employment, which we discuss in the next sub-section.

The table below sets out our *base case scenario* for required employment generation to sustain the targeted population increase in the MNEC. It is important to note that not all of these jobs will be held by residents in the Corridor and we assume a two way flow of commuters coming into the Corridor for employment who reside externally as well as a broadly equivalent number of individuals who live in the Corridor commuting outside for employment.

Base Case Scenario for Employment Generation Required to Ensure Sustainability of Population in the MNEC

Geographic Area	2006	2025-30	Increase 2006-2025-30
<i>Number of Jobs ('000s) Located in:</i>			
MNEC Corridor	29.6	66.7	37.0

Source: Indecon analysis based on GDA Regional Planning Guidelines/Fingal County Development Plan; 2011-2016, and CSO Regional Population Projections

Under the central case, targeting a population in the MNEC of approximately 128,100 persons by 2025-30 and assuming that the ratio of jobs to population of working age in the corridor remains stable at current levels would imply a requirement for additional job numbers in the MNEC amounting to 37,000 jobs respectively by 2025-30 compared with 2006 levels. The achievement of these outcomes would result in the numbers of jobs located within the MNEC rising to 66,700 by 2025-30 compared with the current level of 29,600 jobs. Achieving such a significant expansion in employment within the Corridor area will require both integrated local support from planners and from the private sector, and will also require the assistance of national policymakers. There needs to be significant buy-in from local, regional and national agencies to work towards achieving the future job creation targets identified for the Corridor. This is considered further in Section 10.

Economic development models

A number of specific factors should inform the selection of the most effective economic development models for the MNEC. These are summarised below and discussed in the subsequent paragraphs:

- The need to maximise employment creation focused on jobs *within* the MNEC so as to reduce leakage of skills and out-commuting to areas outside the corridor;

- ❑ A focus on targeting of high value-added economic activities in foreign-owned industry and domestically owned internationally traded services;
- ❑ Employment creation to be supported by a rapidly expanded local population possessing the specialist skills necessary to meet the requirements of business locating in the corridor; and
- ❑ Objective of Carbon Neutral City Region.

In relation to first element above, our analysis of the existing position of the MNEC indicates that:

- ❑ The current ratio of the number of jobs located in the MNEC to the number of persons employed among the population of the corridor is 0.94;
- ❑ However, 72.4% those employed among the population within the corridor work outside the area. Unless this position is addressed for the expanded population targeted for the Corridor, we believe that the area would not be sustainable economically or environmentally. A continuation of a high rate of outbound commuting and skills leakage would also not represent an efficient use of scarce public investment.

Achieving a closer alignment of the skills profile of jobs located in the MNEC to the skills profile of residents in the corridor will require a focus within the development strategy for the area on the attraction of investment in higher value-added sectors activities than currently pertains in the MNEC. In particular, this approach should support employment in sectors offering the greatest development potential based on existing and emerging strengths of the MNEC, including of the strategic sites within the corridor. This should entail a diversified strategy which facilitates the attraction of inward investment projects into the corridor but which also takes account of the likely employment generation potential of traded service sector activities.

In addition, the employment generation strategy must be supported by a rapidly expanded critical mass of population in the MNEC, which possesses an education and skills profile which are aligned with the requirements of inward investment.

A detailed skills strategy for the MNEC should be prepared as part of the implementation of this plan. A successful targeted skills strategy would be an important marketing tool for the Corridor. This would involve a strengthening of industry and third and fourth level education.

Over time, we suggest that a target should be set to achieve of the order of 60% of jobs in the Corridor to be held by residents in MNEC. This would result in a reduction in commuting and enhanced environmental and community benefits. We would still envisage two way commuting flows in and out of the Corridor with inflows and outflows accounting for of the order of 20,000 – 25,000 people. To facilitate this as well as movement within the Corridor, there will be a need for significant park and ride facilities in the Corridor.

Objective of Carbon Neutral City Region

The expansion of the Metro North Corridor provides a unique opportunity to aim for a carbon neutral city encompassing best practice on environmental sustainability.

This requires that 'green city' planning is applied to the core strategy as well as to the design specification and construction of residential and commercial buildings within the Corridor. Low carbon technologies energy efficiency measures and renewables should guide all of the new developments within the Corridor. This should be reflected in specific planning requirements for projects for the MNEC. This will enable the MNEC to be the best practice in environmental sustainability and will contribute to national goals while also enhancing the quality of life for residents and improving the competitiveness of the Corridor.

At the core of the economic strategy for the proposed MNEC green city is the concept that the area would be planned to ensure that high skilled employment and education and health infrastructure is located in close proximity to the proposed areas of residential developments which would accommodate the expanded population. Social infrastructure and transport planning including links with the Metro and the use of cycle lanes in residential districts would also be implemented to provide genuine sustainability.

To be consistent with the objectives of a carbon neutral expansion there will be a need to significantly increase the number of residential units within the town centre and within walking distance of the Metro. This will reduce car traffic and help to create a vibrant environmentally sustainable community.

The requirements for all new residential and commercial developments should include:

- High thermal performance
- Low embodied energy/natural building materials
- Lower water demand measures
- Use of renewable energy
- Waste reduction and improved recycling (including collection systems)
- Water attenuation within building footprints.

In addition to standards for new construction sustainable development strategies will include fundamental changes such as:

- Higher space standards for dwellings
- Significant proportion of family homes with appropriate space and amenity standards – playgrounds, cycle and buggy storage places, communally available facilities such as laundry rooms, community spaces
- Larger, appropriately-oriented private open spaces (balconies and private gardens)

- Linked proportion of mixed use in any proposal with the best match between locally available employment and provision of amenities to be most favoured.

Sectoral Employment Scenarios

In applying an optimal development strategy for the MNEC we have developed a range of employment scenarios which identify a sectoral pattern of employment creation consistent with this strategy. These scenarios reflect our consideration of best practice approaches and developments at national and international level, and assumptions regarding the potential composition of employment generation required to achieve the overall levels of job creation within the MNEC consistent with sustaining targeted population expansion.

The table below indicates the number of jobs (in thousands) which need to be generated within the MNEC as a whole in order to maintain projected employment rates within the corridor out to 2025-30, across the Industry, Non-market Services and Market Services sectors. Industry in this context is taken to include the Manufacturing, Utilities and Building sector. Market Services encapsulates Distribution, Transport & Communications, Financial Services and Other International Services, and Other Market Services.

Base Case Scenario for Sectoral Breakdown of Required Employment Generation within the MNEC by Sector Relative to 2006 Level - 000s

Sector	2025-30
Industry	3.9
Non-market services	4.9
Market Services	28.2
Total Required Additional Jobs	37.0

Source: Indecon modeling based on targets for population growth within Swords and MNEC, and ESRI Medium Term Review 2005-2012

Applying this sectoral composition of employment would imply that the largest proportion of job creation required within the MNEC to ensure sustainability of the projected population increase would derive from the market services sector, followed by the non-market services sector and industry.

The second element in our approach, which is complementary to that described above, provides a more detailed identification of the prospects for the services sector component of employment growth. The implied sub-sectoral distribution of employment generation within the market services sector in the MNEC is shown in the table below. Important contributors to higher value services-based employment generation would include Computers, Computer Software & Consultancy, Financial & Insurance Services and Business Services.

Base Case Scenario for MNEC Employment Structure within Market Services Sector

Sector	2025-30
Total Employment:	66.7
Of which: Financial and Insurance Services	11.0
Commercial Services	2.8
Computers, Computer Software and Consultancy	18.2
Real Estate Renting and Business Activities	15.1
Hotels, Motels, Catering Services and Conference Centres	0.6
Total - Market Services	47.7
Total - Other Sectors	19.0

Source: Indecon analysis

The proposed strategy for the MNEC would include the following:

- Location within the MNEC, including in particular within the 3 strategic sites identified by Fingal of corporate headquarters or divisions of financial services and professional services firms;
- Location with the Corridor and strategic sites of existing and start-up Irish-owned computer and software development-related activities, consultancy and other business and commercial service providers;
- Inward investment projects in internationally-traded services activities;
- Development of green technologies projects and the production of environmental goods and services; and
- Expansion of employment in health and education.

The generation of very significant growth in high-value, high income employment will be a major challenge for the Corridor and to facilitate the attraction of the mix of economic activity will require the effective application of a range of new policy measures for the development of the MNEC.

Risks surrounding scenarios

To be effective and to maximise the benefits of the significant investment in the Metro North rail link, the Corridor will need to achieve above-average economic and employment growth rates and to address its historic under-performance in developing skilled employment. There are, however, risks surrounding the achievement of the required levels of economic growth and employment generation consistent with sustaining the desired levels of population expansion in the MNEC. These risks include primarily:

- ❑ A more significant slowdown in economic growth;
- ❑ Related to this, a loss of competitiveness and a lower level of inward investment;
- ❑ Cutbacks in government expenditure;
- ❑ Failure to implement required policies;
- ❑ Issue re two major potential projects, namely a new educational campus and a hospital; and
- ❑ Risk of creating an unsustainable poor quality of life if planning is not carefully implemented.

Labour and Skills Strategy

To facilitate the achievement of the employment generation scenarios outlined above there will be a requirement for a supporting labour and skills strategy to maximise the economic potential of the targeted expanded population within the Corridor area.

Particular features must be reflected in an effective labour and skills strategy for the MNEC, which are as follows:

- ❑ The need for the strategy to be reflective of the targeted population expansion in the Corridor, particularly in terms of the increased requirements stemming from migrant and other groups;
- ❑ The need to ensure that specialist skills are accessible;
- ❑ Facilitation of a mix of accommodation to attract skilled employees;
- ❑ An integrated plan with development agencies.

Our analysis takes account of the fact that some lower skilled jobs may relocate out of the area but we envisage that some of these will be replaced by higher value employment. Overall, we see a move towards higher skilled employment as part of the strategy for the Corridor.

Recommendations and Delivery Strategy for Economic Development of MNEC

A summary of our recommendations in the areas of policy and planning required to realise the development potential of the MNEC are set out in the table below. An implementation plan with detailed actions for each of the recommendations should be prepared and this is considered overleaf.

Summary of Recommendations

1.	The Economic Development Strategy for the MNEC should target the achievement of a transformational increase in the population of the Corridor to 128,100 by 2025 – 2030.
2.	In the interests of sustainability, we recommend that most of the increase in population should be concentrated in the Swords area. The area should also be the focus for significant employment growth.
3.	The Development Strategy should facilitate commercial and other development in the Corridor that would support a total of 37,000 additional jobs in the corridor to a total of 66,700 representing a more-than-doubling of the existing level of economic activity and employment in the area.
4.	The Development Strategy should attract a range of high-tech manufacturing and services employment to the Corridor.
5.	Key sectors which should be targeted for MNEC include corporate head offices, IT services, financial and business services and science and technology projects, and environmental products and services.
6.	Fingal County Council (FCC) should strongly support proposals for a University Campus in MNEC.
7.	Measures to facilitate the establishment of a hospital within the Corridor should be pursued as a priority.
8.	The focus of core Dublin Airport lands should be on airport activities.
9.	To support the desired increase in population and employment in the MNEC, the Swords-Lissenhall, Dublin Airport Eastlands and Metropark sites should each be targeted for future development.
10.	As well as allowing for residential development, potential non-residential uses for the Swords-Lissenhall site should include third-level education, healthcare, high tech sectors and services.
11.	For Dublin Airport Eastlands, future development should be concentrated in high-value services.
12.	Development at the Metropark site should be concentrated in high-technology manufacturing, science and technology as well as other high-value services.
13.	The delivery of the MNEC Development Strategy should be driven by Fingal County Council with the active cooperation and support of all relevant public and private partners. The feasibility of a more permanent co-ordination structure for investment in the area should be examined.
14.	Investment in supporting road infrastructure, services infrastructure and in social infrastructure to accommodate the expansion in the population in the Corridor must be implemented.
15.	The targeting of the Metro North Economic Corridor by the development agencies to assist the attraction and expansion of indigenous and foreign firms will be essential to the expansion of high skilled employment.
16.	A skills strategy should be prepared to support the proposed economic strategy for MNEC.
17.	Development contributions and other charges by Fingal County Council should be designed to attract appropriate high skilled employment in selected sites.
18.	New developments in the Corridor should meet best international practice in environmental standards for all new commercial and residential buildings.
19.	We recommend that higher densities for selected areas within the MNEC should be approved to facilitate the rapid expansion of population.
20.	Consideration should be given to special planning approaches to accelerate development within the Corridor.
21.	Major targeted marketing and branding investment should be introduced to promote the Corridor as a high skilled Airport City Region.
22.	The Steering Committee overseeing the Economic Development Strategy should, as a priority task, agree on a detailed timeline for delivery of key actions under the Strategy.

Source: Indecon

Population

- 1. The Economic Development Strategy for the MNEC should target the achievement of a transformational increase in the population of the Corridor to 128,100 by 2025 - 2030.**

The starting point of the proposed MNEC Economic Development Strategy is the articulation of an overall population target for the MNEC area. Based on our assessment, we recommend a target of 128,100 by 2025 - 2030 for the population of the Corridor. A significant increase in population in the area is essential to provide the necessary critical mass to support the Metro and to ensure that this key piece of transport infrastructure is utilised effectively. It is also in line with the philosophy underpinning the National Spatial Strategy and the National Development Plan for the development of the Dublin Gateway (and the Greater Dublin Region) to occur in a more compact and sustainable manner, based on higher density development around strengthened public transport links.

This target will have implications for planning policies and for the required increased levels and investment in infrastructure. One aspect of this will be to promote a greater choice of housing. This should include providing for housing at the upper end of the market to attract high skilled residents, provision of apartments which are suitable to family living and the provision of significant residential use in mixed use developments in the vicinity of the Metro.

- 2. In the interests of sustainability, we recommend that most of the increase in population should be concentrated in the Swords area. The projections for population increases outside of Swords do not involve residential development in areas where there would be conflict with aircraft movements.**

We recommend that the majority of the targeted increase in population should be concentrated in Swords in line with Regional and County level planning guidelines and with the thinking underpinning the recent pre-draft Swords Local Area Plan consultation document. This recommendation is also consistent with our evaluation of specific sites. The area will also be the focus for significant employment growth.

Economic Development

- 3. The Development Strategy should facilitate commercial and other development in the Corridor that would support a total of 37,000 additional jobs in the corridor to a total of 66,700 representing a more-than-doubling of the existing level of economic activity and employment in the area.**

An increase in the population of the MNEC area to 128,100 will require a major expansion in the levels of economic activity and employment in the area if the Corridor is to be developed in a sustainable manner. The existing pattern is that most employed residents in the MNEC area commute to outside of the Corridor to their

place of employment. We consider it critically important that future development of the MNEC should be based on an objective that the necessary level of economic activity and employment to support the increased population should, as far as possible, be based in the Corridor itself. This is essential to avoid a situation where the Corridor becomes a huge dormitory town where people live but do not work. From a transport perspective, it is also essential to ensure that the Metro is fully utilised in both directions and does not become a means of transporting people to and from their place of employment outside the MNEC. We recommend that a target of 37,000 for the increase in the level of employment in the Corridor. This would maintain the existing ratio of jobs to working age population in the MNEC. The Development Strategy should aim to facilitate a level and pattern of commercial and other development that would facilitate this level of increased economic activity.

4. The Development Strategy should attract a range of high-tech manufacturing and services employment to the Corridor.

Our view is that most if not all employment growth in the Irish economy as a whole over the next 20 years will be in the services sector. Within the broad services sector, employment in market services will grow at a somewhat faster pace than employment in non-market services. The development strategy for the MNEC needs to be cognisant of these projected wider national trends. Nevertheless, we think it important that, given the scale of the increase in economic activity required if the MNEC is to be a sustainable economic area, the Development Strategy should aim to generate an increase in employment in both the manufacturing and services sectors. The likelihood is that most job creation will in fact be concentrated in the services, particularly market services areas, but we recommend that the strategy should aim for a pattern of commercial and other development that facilitates employment generation in both the manufacturing and services sectors.

5. Key sectors which should be targeted for MNEC include corporate head offices, IT services, financial and business services, science and technology projects and environmental products and services.

Key sectors which we recommend should be targeted for the MNEC include corporate head offices, IT services, financial and business services and science & technology projects and environmental products and services. These are all growth areas and are consistent with best practice models for similar corridor developments elsewhere in Ireland and internationally. In addition to these key traded sectors, the two other areas of potential are a hospital/major healthcare facility and a 3rd-/4th-level education/research campus.

6. FCC should strongly support Proposals for a University Campus in the MNEC

A particular sector which we believe is of key importance is the 3rd and 4th level education and research sector. This reflects the role of the sector both in terms of provision of skilled labour but also in developing R&D activities. The Corridor is a very appropriate location for a significant new third or fourth level university campus. We would recommend that FCC continue discussions with the sector and related investors to pursue this opportunity and that planning should facilitate this important project.

7. Measures to Facilitate the Establishment of a Hospital within the Corridor should be Pursued as a Priority

The MNEC will experience a very significant expansion in population and a hospital to service this increase would be appropriate. Given the excellent rail and road and airport connectivity of the Corridor such a hospital would have potential to service a wider area. A hospital in the Corridor would be also important in terms of integration with the proposed University Campus and would support the development of bio-medical and pharmaceutical activity in the Corridor. We therefore recommend that FCC should continue to pursue measures to facilitate the establishment of a major hospital within the Corridor. This should include ongoing discussions with potential hospital promoters and the development of an illustrative architectural model for such a facility.

Development of Strategic Sites

8. The focus of core Dublin Airport lands should be on airport activities.

Indecon considers that the development and enhancement of services at Dublin Airport is of fundamental importance. We believe that it is appropriate that Dublin Airport focuses on enhancing its quality of service as Ireland's premier airport and this is well provided for in the Dublin Airport LAP. By becoming a more effective airport, other things being equal, Dublin Airport will attract greater passenger numbers, see more airport movements and realise a larger share of air freight in value-added goods, which in turn will contribute to the economic development of the wider Corridor area (given the planned transport improvements and the Metro North). We therefore consider the most appropriate strategy for the core Dublin Airport lands to be one which focuses on the development of the airport as an international airport (as envisaged in the Dublin Airport Local Area Plan (LAP), the focus of which should be is on aviation-related development. Nothing in the MNEC strategy should hinder the efficient and effective development of the Airport or access to and from the Airport.

9. To support the desired increase in population and employment in the MNEC, the Swords-Lissenhall, Dublin Airport Eastlands and Metropark sites should each be targeted for future development.

As discussed in detail earlier in this report, there are a number of strategic sites within the corridor area that offer significant development potential. These are the Swords-Lissenhall, Dublin Airport and Metropark sites. All 3 sites have significant strengths including proximity to the Metro line and access to the skilled population base in the MNEC. The Dublin Airport Eastlands site includes lands owned by DAA and by other land owners. However, as discussed earlier, there are a number of restrictions particular to each site which relate in part to their planning status including planning restrictions and the existence of otherwise of a Local Area Plan (LAP), and more significantly to appropriate future development.

10. As well as allowing for residential development we recommend that the main non-residential uses for the Swords-Lissenhall site should include third-level education and healthcare and high tech sectors and services.

We recommend that as well as allowing for residential development the main non-residential uses for the Swords-Lissenhall site should include third level education, healthcare, high tech sectors and services. We however also recommend that planning is flexible to permit appropriate users in different parts of the corridor.

The Swords-Lissenhall site is the largest of the sites in spatial terms (358 hectares in total) and would prove highly attractive for a 3rd- or 4th-level facility and a hospital, given its proximity to the Metro terminus (Lissenhall site) and to the M1 and the Dublin-Belfast corridor. Swords will also be the centre of population expansion. In order to house a significant proportion of the planned increase in population for the Corridor, changes to existing housing densities will be required. This is discussed further below. There will also be opportunities for employment expansion in the high tech sectors and in services.

11. For Dublin Airport Eastlands, future development should be concentrated in high-value services.

The main non-aviation development potential at Dublin Airport relates to the Eastlands lands adjacent to the M1 roundabout and to the east of the airport terminal buildings. These lands include lands owned by DAA and other land owners and offer obvious development advantages given their location. While the release of these lands for development purposes would require a variation to the existing Fingal County Plan, there is potential to develop the Eastlands land bank and proceeding with this in a phased manner may be the most appropriate commercial decision for DAA and other owners. Development of this site must be undertaken in a way which does not hinder the efficient and effective development of the airport. We do not, however, believe there is very significant activity which could be attracted to the Eastlands site which is specifically reliant on the airport, even though Dublin

Airport has significant marketing potential for investors. We therefore would not recommend restricting planning only to activities which intensively use the airport.

12. Development at the Metropark site should be concentrated in high-technology manufacturing, science and technology as well as other high-value services.

The Metropark site comprises 75 hectares which are strategically located along the Metro route. While already zoned for development purposes, we understand that no development on this site can occur until a LAP is approved for the area. This site is an important potential location for economic development in the Corridor and suggested economic activity for this site should include science and technology as well as other high value-added services.

Delivery Mechanisms and Roles

Strategy Coordination

13. The delivery of the MNEC Development Strategy should be driven by Fingal County Council with the active cooperation and support of all relevant public and private partners. The feasibility of a more permanent co-ordination structure for investment in the area should be examined.

The delivery of an ambitious economic development strategy for the MNEC will require the active support and co-operation of a wide range of actors. To ensure effective coordination, a steering committee should be established and chaired by Fingal County Council. The other members should include senior representatives from DAA, Government Departments (including the Departments of Environment, Heritage and Local Government, Transport and Education and Science), State bodies (including the RPA, FÁS, IDA Ireland and Enterprise Ireland) and relevant private sector interests (including local Chambers of Commerce). We consider that Fingal County Council would play a key role in overseeing the delivery of the Strategy working in co-operation with a wide range of parties including Government Departments, relevant State Bodies including the enterprise development agencies, the Dublin Airports Authority and private sector interests. The efforts of these bodies need to be effectively coordinated by FCC through appropriate mechanisms. Invest Fingal may represent the basis for this co-ordination mechanism.

Our review of the case study evidence on airport-related development also highlights how innovative public-private partnership (involving key stakeholders taking a joined-up approach to business investment) has been important, not least in the case of Schiphol, where the wider Amsterdam Airport Area (AAA) is effectively operated by a partnership comprising the local state economic development agency and the airport operator, among other public and private stakeholders. In the case of Schiphol, each member of the AAA partnership has a particular, clearly defined function within the overall aim of sustainably growing the AAA (including marketing, attracting inward investment, preserving the quality of the natural and built environmental etc.).

We also believe that the feasibility of developing a more permanent co-ordination structure to support investment in the Corridor should be examined. This could provide an integrated structure to facilitate the local authorities working closely with government departments, development agencies and other key stakeholders to co-ordinate and implement planning and other policy measures, discussed further below.

Public Sector Role and Delivery Mechanisms

14. Investment in supporting road infrastructure, services infrastructure and in social infrastructure to accommodate the expansion in the population in the Corridor must be implemented.

We believe that a range of delivery mechanisms will be required to facilitate the stimulation and attraction of economic activities to the MNEC. These mechanisms encompass a range of policy tools and instruments available to government departments, local authorities and development agencies. We believe a specific requirement will involve the need for public-sector expenditures to be leveraged to ensure that infrastructure in the MNEC is brought up to the standards required to maximise the attractiveness of the Corridor, both as a place to live and as a location for investment. This will require, in particular, investment in supporting road infrastructure, services infrastructure and in social infrastructure to accommodate the targeted expansion in population and economic activity envisaged for the Corridor. Required infrastructure will include water services infrastructure and other physical and social infrastructure.

15. The targeting of the Metro North Economic Corridor by the development agencies to assist the attraction and expansion of indigenous and foreign firms will be essential to the expansion of high skilled employment.

There will also be a need for close involvement of the development agencies – including IDA Ireland, Enterprise Ireland, Fáilte Ireland, SFI and FÁS – in the development of the MNEC. In particular, we believe that agencies, in their planning and client engagement activities, should target and market the strengths of the MNEC as a highly attractive location for investment, access to a skilled and growing population base, 3rd/4th-level institutions, access to national and international markets via excellent regional and national transport linkages, proximity to Dublin Airport and Dublin Port, and the Corridor’s high quality of life for resident and employees.

The targeting of the MNEC by the development agencies will require specific action programmes related to key challenges and individual sectors. For example, in the case of tourism development there is potential for the MNEC giving its connectivity internationally and to Dublin City as well as the attractions of the area. The tourism industry and Fáilte Ireland should work together to capitalise on this potential through new investment and marketing initiatives. Tourism was seen as a potential area for high priority for the Corridor in our survey of businesses. In the case of research and innovation links between businesses and higher educational institutions only 10% of businesses in MNEC had such linkages and strengthening these linkages will be important for indigenous and foreign industry. This will require co-ordinated initiatives by industry in Corridor with IDA (Ireland), Enterprise Ireland and SFI.

There is also a need for specific initiatives to facilitate the development of environmental technologies and services which could include new research, feasibility studies, venture capital support and the spin offs from the carbon neutral development strategy for the area.

16. A Skills Strategy should be Prepared to Support the Economic Strategy.

The proposed economic strategy for MNEC involves a significant expansion of high skilled employment in the area. This will be facilitated by planning decisions on the mix of economic activity which will be facilitated and by the significant expansion of population for the Corridor. The MNEC mix of housing will also need to be planned to be suitable to attract high skilled residents. There is, however, also a need for a specific skills strategy to be prepared. This should focus on the development of skills levels and changes in educational attainment within the MNEC.

A successful business targeted skills strategy could also be used to support marketing to attract specific types of economic activity to the Corridor.

17. Development contributions and other charges by Fingal County Council will need to be designed to attract appropriate high skilled employment in selected sites.

The development contributions, the levels of charges and planning requirements should be designed for particular sites in a manner which will facilitate high skilled employment of scale on selected sites with the Corridor. Apart from providing supporting infrastructure there are three policy instruments available within FCC to facilitate appropriate development in the corridor namely the design of development contributions schemes, the levels of charges for services and the densities and other conditions of planning. We recommend that consideration be given to how to use these instruments to achieve economic and planning objectives.

For example in designing a new development contribution scheme for approval by the Council account should be taken of actual costs which are attributable to different types of development. A simple square metre allocation could result in discrimination against intensive commercial development. Refinements of such schemes should be considered. Similar issues apply to how services charges are levied. On the issue of densities and requirements for car parking and other planning conditions the need for a flexible approach which would incentivise high skilled intensive commercial development on selected sites should also be considered.

18. New developments in the Corridor should meet best international practice in environmental standards for all new commercial and residential buildings.

The MNEC has a unique opportunity to be best in class in terms of environmental standards. This will enhance the attractiveness and the competitiveness of the MNEC. We recommend that a green city planning approach is applied to the core strategy as well as to the design, specification and construction of residential and commercial buildings within the Corridor. Low carbon technology, energy efficiency measures and renewables should guide all of the new developments within the Corridor. This should be reflected in specific planning requirements for projects for MNEC.

19. We recommend that higher densities for selected areas within the MNEC should be approved to facilitate the rapid expansion of population of scale.

The scale of population increase required for the effective development of the Corridor cannot be achieved without changes in density levels. It will therefore be essential for higher densities to be permitted for selected areas within the Corridor. A mix of high and low density housing and commercial activities will be appropriate. In designing specific plans the need to ensure high quality upmarket housing as part of the mix will also be important.

20. Consideration should be given to special planning approaches to accelerate development within the Corridor.

A number of areas in Ireland have implemented specific approaches to accelerate development. These include specific plans by local authorities for particular areas as well as legislative changes for areas such as Dublin Docklands. Consideration should be given to special planning approaches for the MNEC.

21. Major targeted marketing and branding investment should be introduced to promote the Corridor as a high skilled Airport City Region.

The MNEC represents a special opportunity to expand economic activity. Major targeting marketing and branding will however be needed to promote the Corridor. This will be particularly important given the downturn in construction activity in Ireland. The marketing and branding of the Corridor should take account of the fact that the Metro will continue into St. Stephen's Green and will therefore be linked directly to the capital city centre.

The marketing plan should encompass a number of different phases. In the early phases the marketing plan should be targeted at highlighting to developers and investors the key economic strategy for the Corridor, and what policies FCC has to facilitate development. The publication of the summary economic development strategy for the Corridor will be the first step in implementing this marketing plan.

An infrastructure proceeds a second phase in the marketing plan will be to highlight the strengths of the Corridor and to ensure the area has an identity for investors and others. This should be undertaken in an integrated way with major developers, DAA and with the development agencies.

Implementation Plan and Timeline

22. The Steering Committee overseeing the Economic Development Strategy should, as an initial priority task, agree on a detailed timeline for delivery of key actions under the Strategy.

The proposed steering committee for the development of MNEC should agree on a detailed timetable for delivery of key actions under the strategy. We present overleaf an indicative timeframe for strategy implementation under the four major action areas or roles envisaged for the public sector in its delivery.

The steering group should inter alia encompass a capability to deal with changing international or Irish developments. The sharing of economic intelligence would assist appropriate planning responses to any changes.

The economic and social infrastructure investment requirements will include the Metro, roads and environmental services and schools and health facilities. It will also include parks, waterworks investment and bus services in tandem with the Metro.

Indicative Implementation Plan

An implementation plan for achieving the roll-out of the MNEC Economic Development Strategy, including the key roles and actions, responsibilities and an indicative timeline, is presented below. These timelines reflect the need to phase infrastructure to accommodate the targeted expansion in population and employment.

Indicative Timelines for Implementation of MNEC Economic Strategy

Key Roles and Actions	Responsibility	Indicative Timeline
1. Planning:		
<input type="checkbox"/> Adoption of Swords Area Local Plan	Fingal County Council	End 2008
<input type="checkbox"/> Adoption of Lissenhall LAP or SD2 2009	Fingal County Council	2009
<input type="checkbox"/> Adoption of Metropark Local Area Plan	Fingal County Council	2009
<input type="checkbox"/> Costing of Infrastructure and Decisions on Funding Sources	Fingal County Council	2009
<input type="checkbox"/> Adoption of new Fingal County Development Plan	Fingal County Council	2011
<input type="checkbox"/> Consideration of Planning Applications	Fingal County Council	Ongoing 2008 to 2030
2. Provision of Public Economic and Social Infrastructure:		
<input type="checkbox"/> Commencement of Metro service	Railway Procurement Agency	2013/2014
<input type="checkbox"/> Provision of road access and environmental services at three sites	Fingal County Council with support of Departments of Transport and Environment, Heritage and Local Government	Planning during 2008/2009 to 2015 Construction 2010 - 2014
<input type="checkbox"/> Provision of schools, health facilities and social infrastructure	Department of Education and Science and Health Service Executive Agency, Department of Transport, Dublin Bus and Environment Heritage and Local Government	Ongoing 2008 to 2030 in line with population increase
3. Targeting by Enterprise Development Agencies		
	IDA, Enterprise Ireland, FÁS, Science Foundation Ireland	Ongoing 2008 to 2030
4. Marketing of MNEC Area		
	Fingal County Council/Development Board with support of enterprise development agencies, DAA and private sector.	Ongoing 2008 to 2030

Source: Indecon assessment

Conclusion

The proposed economic development strategy for the Metro North Economic Corridor includes a transformational shift in both the rate of growth and the composition of economic activity. The plan envisages an increase in population from 59,000 in 2006 to 128,100 by 2025 - 2030 and an increase in employment from 29,600 to 66,700. Achieving this will be a major challenge and will require innovative policy initiatives. The proposed strategy is, however, essential for the sustainable economic development of the Corridor and to ensure the maximum economic benefits are derived from the major investment in the Metro North rail link.

Acknowledgements/Consultations

Indecon would like to acknowledge the inputs of RPS and Bone Wells to our analysis. In addition a wide range of individuals and organisations provided inputs without which the completion of this strategy would not have been possible. Indecon would like to acknowledge the valuable inputs and assistance provided by senior officials from Fingal County. In particular, we would like to thank the County Manager, David O'Connor, members of the steering committee overseeing the preparation of the strategy and other staff at Fingal County Council. Particular thanks are due to P. J. Howell, Declan Ryan, Ann-Marie Farrelly, Rachel Kenny and David Pryor. Thanks are also due to Gilbert Power, Mick Lorrigan, Ciaran Staunton, Helen Marry, Anne Markey, Linda Martin, Sean O'Faircleallaigh, Marjorie O'Shea, Una O'Neill, Larry Ryan and Stephen Gaughran at Fingal for valuable inputs and advice during this study. We would also particularly like to acknowledge the inputs of a range of external stakeholders, including Dublin Airport Authority, Fingal County Enterprise Board, Fingal Dublin Chamber, IDA Ireland, Enterprise Ireland and Dublin City University. Thanks are also due to a range of organisations internationally who provide information to the consultancy team. We would also like to thank the officials at the Central Statistics Office who provided access to new data for the purposes of this strategy. Special thanks are due to the numerous companies and businesses and land owners in the Fingal and MNEC areas who inputted to the strategy via direct submissions and survey research. We would in particular like to thank 245 businesses in Fingal who responded to our consultation survey. This exceptional level of input from the business community is greatly appreciated. Indecon would also like to thank Fingal Councillors for inputs to the study including Cllr. Anne Devitt and Cllr. Ciaran Byrne. The usual disclaimer applies and the views and analyses contained in this document are the sole responsibility of Indecon.