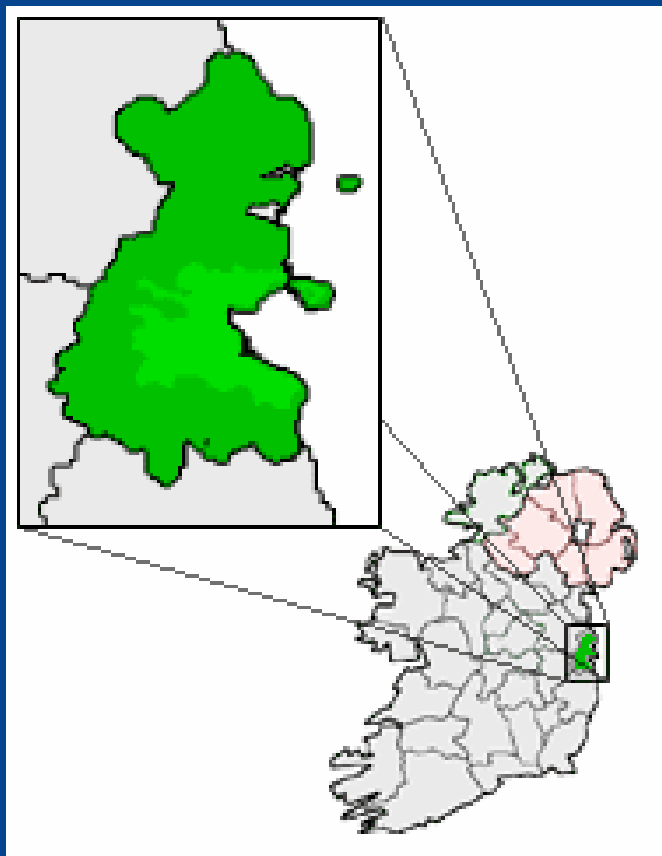




Challenges for the Dublin Region

Presentation by

Patricia Potter,
Director,
Dublin Regional Authority



Structure of Presentation

- Irish Governance Structures
- Economic Profile of the Dublin Region
- Role of City Regions
- Key Challenges for the Dublin Region



Government Structures in Ireland

CENTRAL - **Government Departments**

REGIONAL - **Regional Assemblies**

- **Regional Authorities**

LOCAL - **Local Authorities**



Division of Functions

- | | | |
|---------------------------------|---|--|
| Central Government Depts | - | Policy makers; Finance providers; Enforcers |
| Regional Assemblies | - | Concerned with balanced regional development |
| Regional Authorities | - | Co-ordinators; Reviewers; Provides regional focus |
| Local Authorities | - | Actionaries; Closest to people |

Regional Government

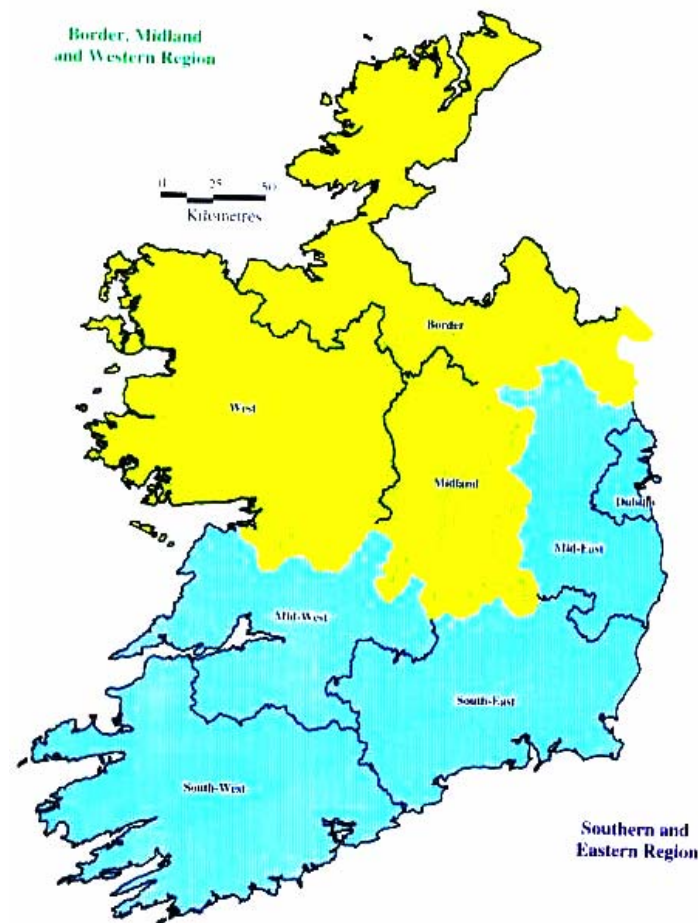


Regional Assemblies

Regional Assemblies

(set up in 1999):-

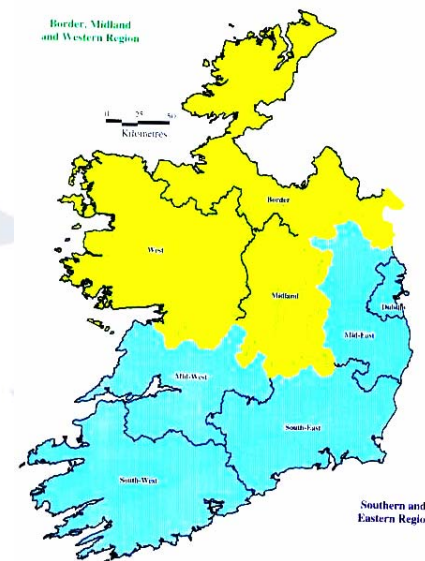
- ❖ **Border Midland and Western Regional Assembly**
- ❖ **Southern and Eastern Regional Assembly**





Southern & Eastern Regional Assembly

- | | | |
|-------------------|---|--|
| Dublin | - | Dublin City and three Counties; |
| South-East | - | Carlow, Kilkenny, Tipperary SR,
Waterford, Wexford; |
| South-West | - | Cork, Kerry; |
| Mid-West | - | Clare, Limerick, Tipperary; |
| Mid-East | - | Kildare, Wicklow, Meath. |





Demographic of S & E Region

Population	-	73%
Area	-	36,414 sq.km
Urban : Rural	-	68% : 32%
Population Density	-	73 (per sq.km)
Major Urban Centres	-	4
Town over 10,000	-	16
Town 5,000-10,000	-	18

Dublin Regional Authority



Major Urban Centres of S & E Region

Dublin; Cork; Waterford and Limerick

Cork is second largest city

Dublin is over
5 times
the size of Cork





Regional Authorities

(set up in 1994):-

Eight (8) regional authorities in Ireland





Regional Authority Functions

- Prepare Regional Planning Guidelines;
- Review of the overall needs and development requirements of the region;
- Promote co-ordination, co-operation and joint action among the public services and local authorities;
- Monitor spending and progress of the National Development Plan and EU Structural Funds.



Membership of Dublin Regional Authority

Dublin Regional Authority consists of a **Board of 30 elected representatives** nominated from the constituent four Dublin local authorities operating within the region.

The Board is supplemented and assisted by –

- an Operational Committee, which consists of the chief executives from the public service agencies and
- an EU Operational Committee consisting of State agencies, local authorities and public bodies.

Dublin Region Economic profile

Dublin Regional Authority

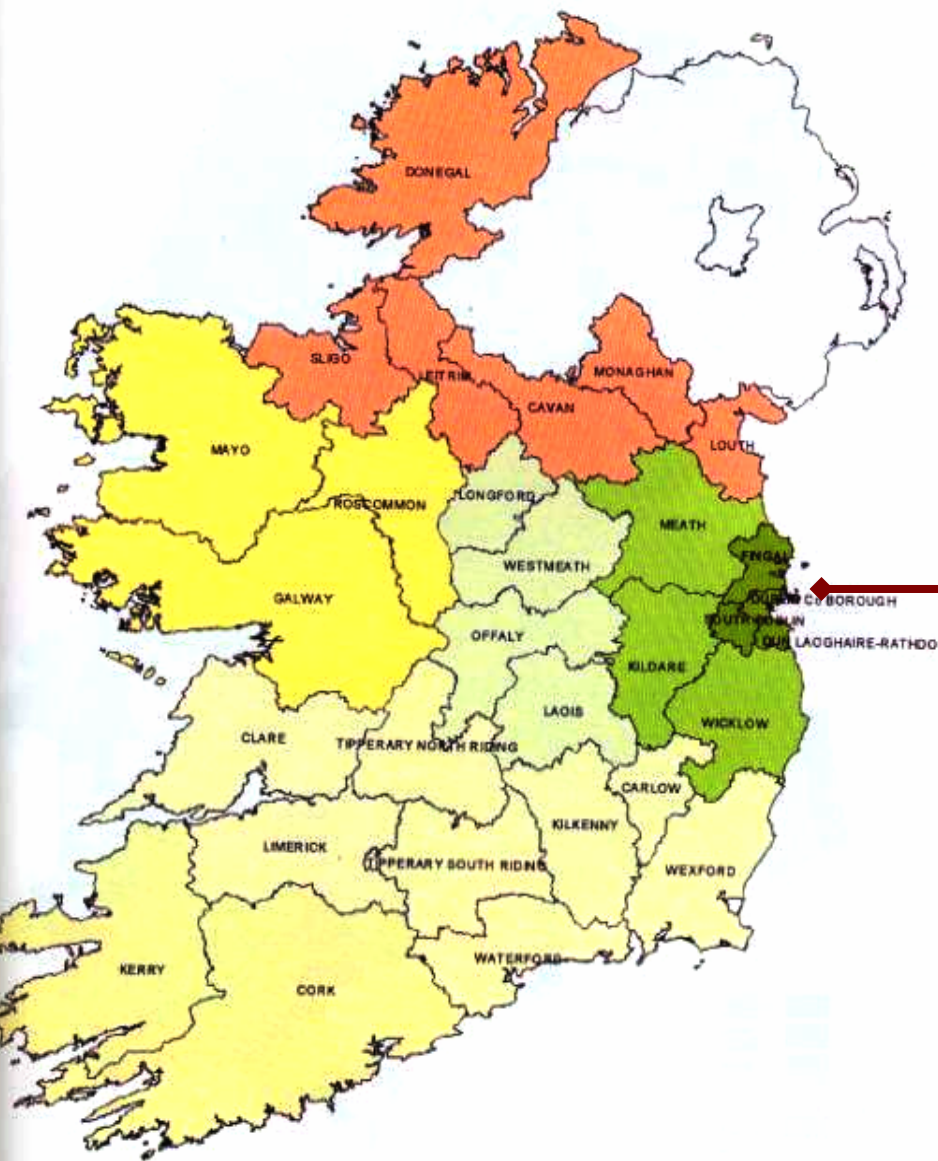


The Dublin Region

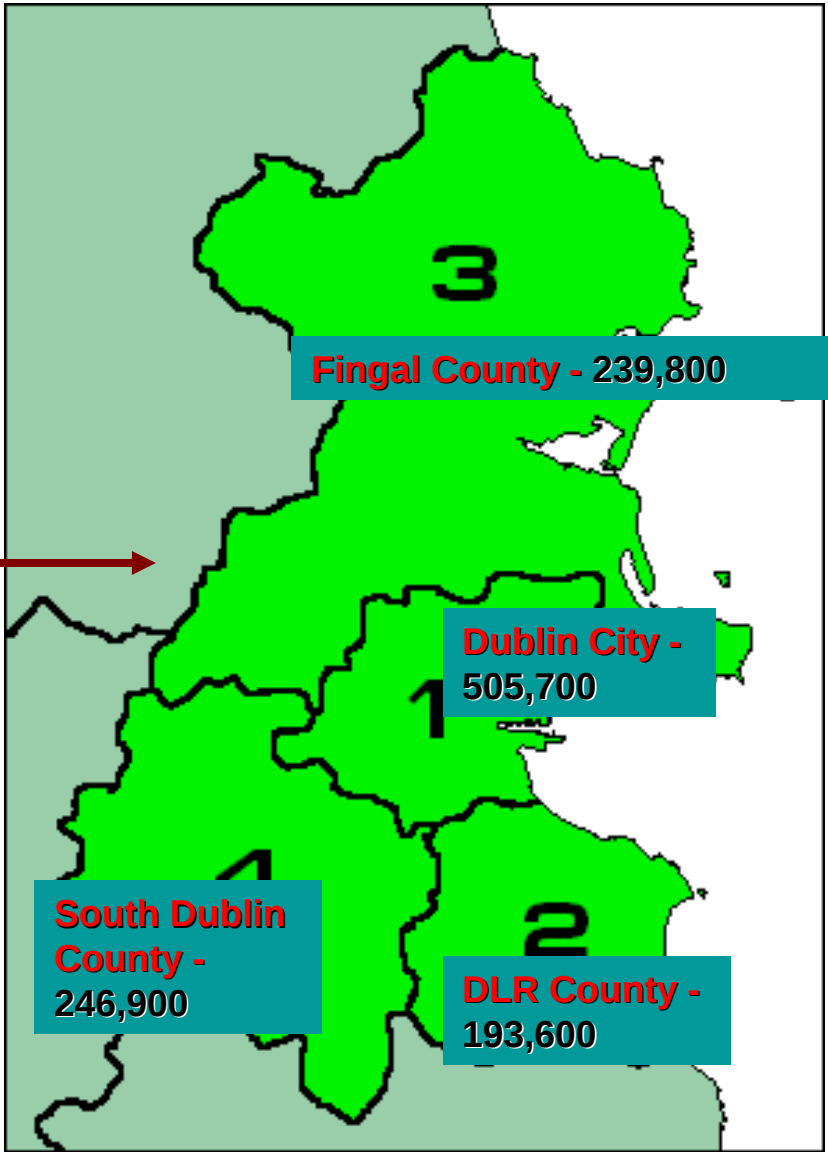
- Comprises 4 local authority areas;
- Population of 1.186m;
- Powerhouse of Ireland's economic growth;
- Houses the nation's Capital City and main ports;
- Seat of Government;
- One of the fastest growing regions in Europe



Map1: The Counties and Regions of Ireland



The Dublin Region





Population Growth – 2000-2006

Rate of Growth

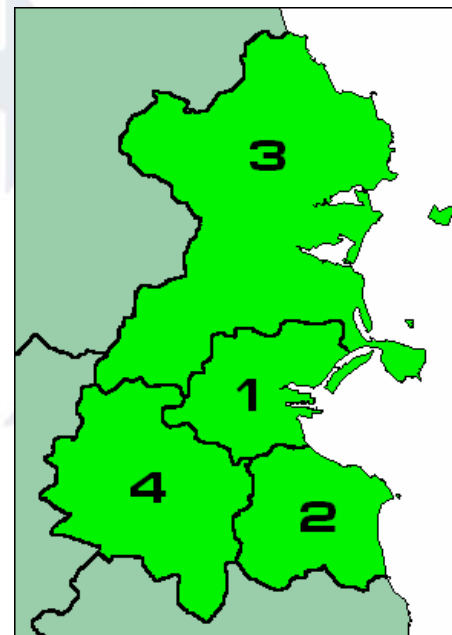
Dublin Region 1,186m = 5.6%

Dublin City 505,700 = 2.0%

DLR 193,600 = 1.0%

Fingal 239,800 = 22.1%

South Dublin 246,900 = 3.4%



Dublin Regional Authority



Dominance of Dublin Region in the Irish Economy in recent years

- 80% of State sponsored bodies located in Dublin;
- 70% of major public & private companies;
- All financial institution's H.Qs.

All inter-dependent making the region a major location in Ireland for inward investment.





Of critical importance has been the provision of optical fibre international connections and the development of dedicated space for –

- **Financial Services Centre - City area;**
- **National Digital Park - City West;**
- **Digital District - Guinness Brewery area.**





Foreign Owned Companies

- Over 1,000 companies in Ireland
- Employing 130,000
- Exports of €72 billion
- Generating €18 billion to Irish economy

Dublin -

- 474 companies employing over 54,700 people

Irish Owned Companies

- Over 3,500 companies in Ireland
- Employing 140,000
- Exports of €11 billion
- Generating €17 billion to Irish economy

Dublin –

- Over 40,700 people employed



Greater Dublin's Output and Employment

- **Output** - **€56.484m (35% increase on 2000 figures)**
- **Employment**- **820,600 (10% growth since 2003)**

Output by Sector

Agriculture	-	0.7% (€427,000)
Industry	-	30.5% (€17.2m)
Services	-	68.3% (€38.5m)

Employment by Sector

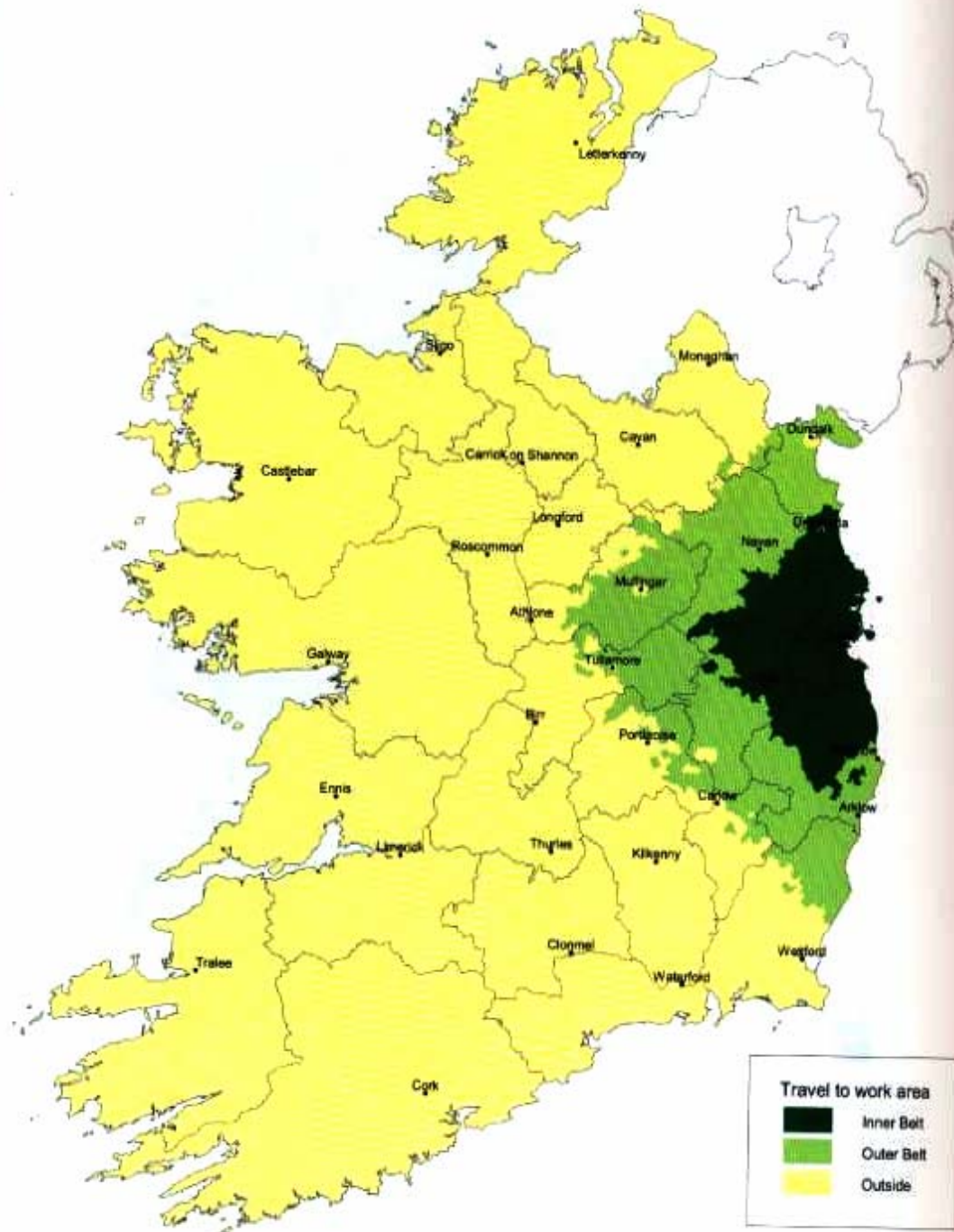
Agriculture	-	1.8% (14,700)
Industry	-	22.3% (182,900)
Services	-	75.9% (623,000)



Labour Market

	Jobs	Labour Force
Dublin Region	626,700	555,300
Dublin City	382,700	250,300
DLR	72,000	86,800
Fingal	76,500	98,400
South Dublin	95,300	119,600

Commuter Pattern



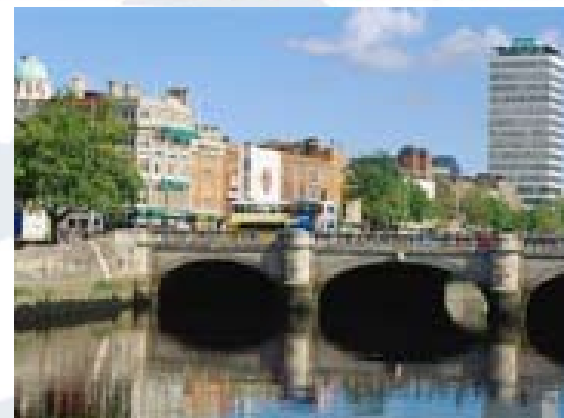
Dublin Regional Authority



Movement patterns

Industrial and services activities has generated enormous demand for office space.

Office space sold or leased between 1995 and 2005 is five times that of period 1985 to 1995.



Results =

move to office space on outskirts of city which generated movement patterns and contributes to worsening traffic congestion.

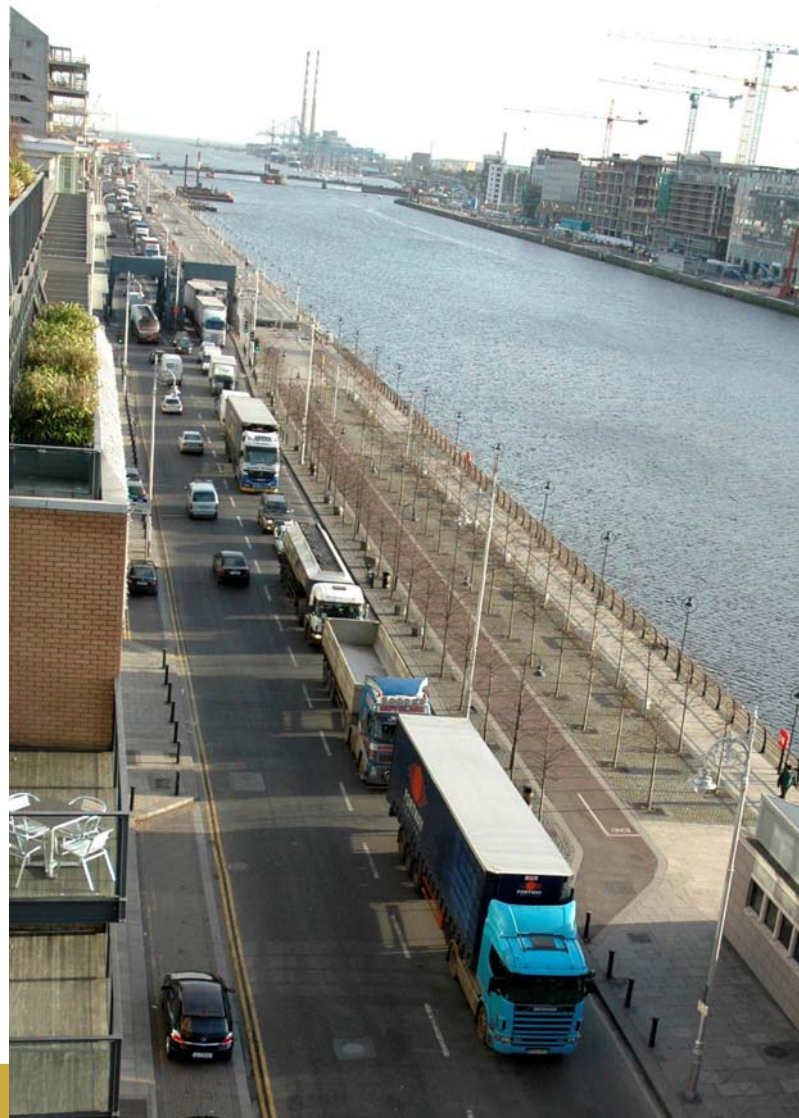




Goods movements

Movement of goods into and around city has significantly increased –

- volume of goods passing through the Port has increased from 8m tonnes in 1993 to over 20m tonnes in 2005.
- Impact on region's infrastructure is evident along the quays and major routes to rest of country





Dublin Port Tunnel opened December 2006

**Ban on 5 axle trucks
from the city centre
during the day**





New vehicles

Growth in numbers of new vehicles on Dublin's roads -

•1995	=	37,663
•2000	=	120,000
•2004	=	77,036
•2006	=	86,500
•2007	=	+ 6.5%

**Result - congestion,
pollution, quality of life.**



Dublin as a Global
city Regions



- ❑ Growing recognition in Europe that major city-regions play a central role in a modern knowledge based economy.
- ❑ UK study found that knowledge based sectors are heavily concentrated in or near the centres of major cities
- ❑ Research evidence suggests that the reputation and attractiveness of major cities has a determining influence on the competitiveness of the economy as a whole.

Dublin is Ireland's only global centre and has a pivotal role to play in Ireland's continued economic performance and development.

Dublin Regional Authority

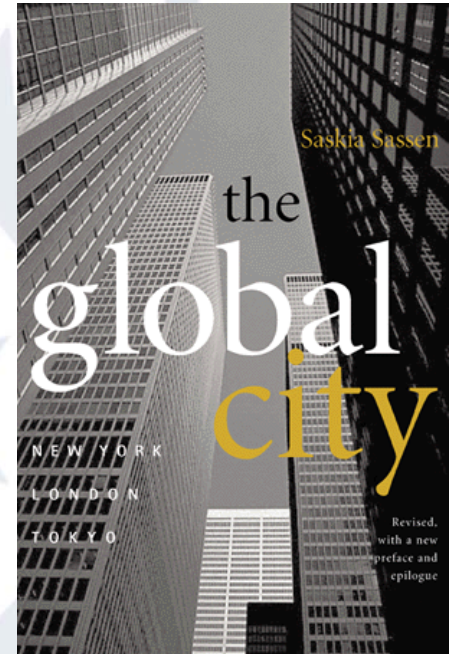


Global nodes : London, Paris, New York, Tokyo,

European engines : Munich, Frankfurt, Brussels, Rome, Madrid

Potential Metropolitan Growth Areas (MGA's) : Helsinki, Manchester, Dublin, Turin, Oslo

Weak MGA's : Bordeaux, Porto, Krakow, Riga, Cork





Dublin's Ranking as Business Location

(Source: Cushman Wakefield Healey & Baker, *European Cities Monitor 2004*)

- **OVERALL – 12th**
- **Access to Markets – 23rd**
- **Availability of Qualified Staff – 15th**
- **Cost of Staff – 7th**
- **Quality of Life – 13th**
- **Climate Government Creates – 1st**

When asked which cities were doing the most to improve themselves, only 5% of those surveyed cited Dublin compared to 22% for Barcelona and 17 % for Madrid.



Critical Success Factors

- **Access/connectivity**
- **Highly Skilled Workforce**
- **Innovation**
- **Diversity of Enterprise Base**
- **Quality of Life**



Key challenges for the Dublin Region



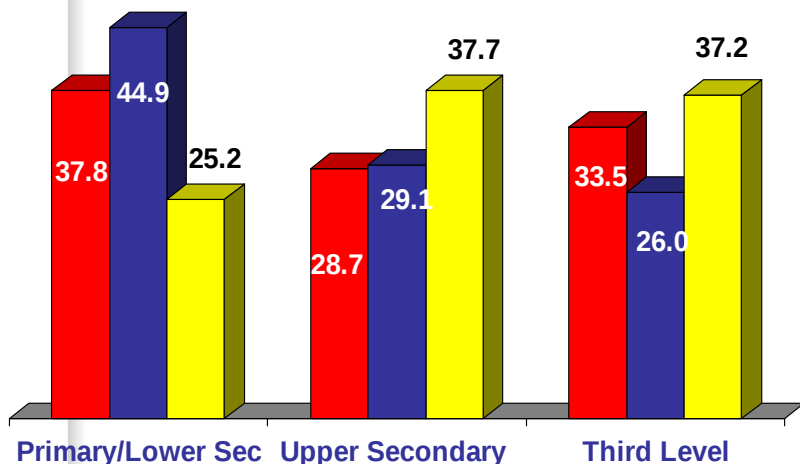
Access/connectivity

- Dublin ranked 23rd, performing poorly on both external and internal transport facilities
- Public transport improvement was the single most demanded improvement by companies surveyed
- Lengthy delays in making decisions on key infrastructure priorities:
 - Rail link to airport
 - Integrated city centre rail network
 - Second airport terminal
 - Eastern by-pass
 - Outer orbital route
- Also delays in delivering major infrastructure projects once they have been approved

Dublin Regional Authority



Skilled Workforce
*7.2 % in Dublin have MA/PhD
compared with 4.6% nationally*



■ Dublin

■ Ireland

■ 15-30 Ireland

- ☐ Overall stock of secondary graduates in Ireland is poor
- ☐ Low level of staff training
- ☐ Increased emphasis on ICT required

But...

- ☐ Ireland has the youngest population in Europe with over 40% under 25
- ☐ Ireland's total investment in knowledge increased by an average annual rate of 10% over the past decade compared with averages of around 3% by the EU and the OECD.

European Innovation Index

Region	City	Country	Rank	Score
Stockholm	Stockholm	Sweden	1	225
Uusimaa	Helsinki	Finland	2	208
Noord-Brabant		Netherlands	3	191
Pohjois-Suomi		Finland	4	161
Eastern		UK	4	161
Île de France		France	6	160
Bayern	Munich	Germany	7	151
South East		UK	8	150
Comunidad de Madrid		Spain	9	149
Baden-Württemberg	Stuttgart	Germany	10	146
Sydsverige		Sweden	11	143
Berlin		Germany	12	140
Östra Mellansverige		Sweden	12	140
South West	Bristol	UK	14	147
Västsverige		Sweden	15	146
Midi-Pyrénées	Toulouse	France	16	141
Wien		Austria	17	126
Etelä-Suomi		Finland	18	124
Utrecht		Netherlands	19	123
Flevoland		Netherlands	20	114
Vlaams Gewest		Belgium	22	112
Lombardia	Milan	Italy	22	112
Kärnten		Austria	23	111
Région Bruxelles		Belgium	23	111
Rhône-Alpes	Lyon	France	23	111
Lazio		Italy	26	110
Piemonte	Turin	Italy	27	109
Zuid-Holland	Rotterdam	Netherlands	27	109
Hessen		Germany	29	108
Southern and Eastern		Ireland	29	108
West Midlands	Birmingham	UK	29	108



Diversity of Enterprise Base

- The cities which are most successful in responding to economic change are those least dependent on a single sector
- Dublin is host to a cluster of leading companies across a range of sectors including Financial Services, Life Sciences, International Services and ICT. Their activities include R&D, manufacturing and services.
 - ICT: Bell Labs; IBM; Microsoft; Iona
 - Financial Services: Citigroup; Merrill Lynch; AIB
 - Life Sciences: Wyeth; Biotrin; Megazyme
 - Other Services: eBay; Google; Riverdeep



Quality of Life

- Culture, environment, architectural and housing quality and city centre facilities
- 11th most expensive city in the world (6th in Europe)
 - 22nd in the world (14th in Europe) on the QOL indicator
- House prices in Ireland grew by 179% from 1997-2004 (147% in Britain, 131% in Spain)
- Increased congestion and longer journey times
- Need to implement integrated land use and transport policies



Quality of Life: Positives

- **Vibrant and cosmopolitan city**
- **Wide range of sport and leisure pursuits**
- **Active theatre scene – Gate, Abbey, Andrews Lane**
- **Rich cultural heritage – Joyce, Beckett, Wilde**

Dublin Regional Authority



Key Challenges for the Dublin region

Infrastructure

- Public transport
- Road Network
- Waste treatment
- Water services

Employment and Education

- Increase the numbers of Phd graduates
- Address the Skills gaps
- Long-term unemployment
- Early school-leavers

Poverty

- Drugs and substance abuse
- Depressed household incomes
- Crime
- Health and Nutrition

Housing

- Increase the supply of new homes
- Provide more Social Housing
- Homeless
- Asylum Seekers/Refugees
- Integration

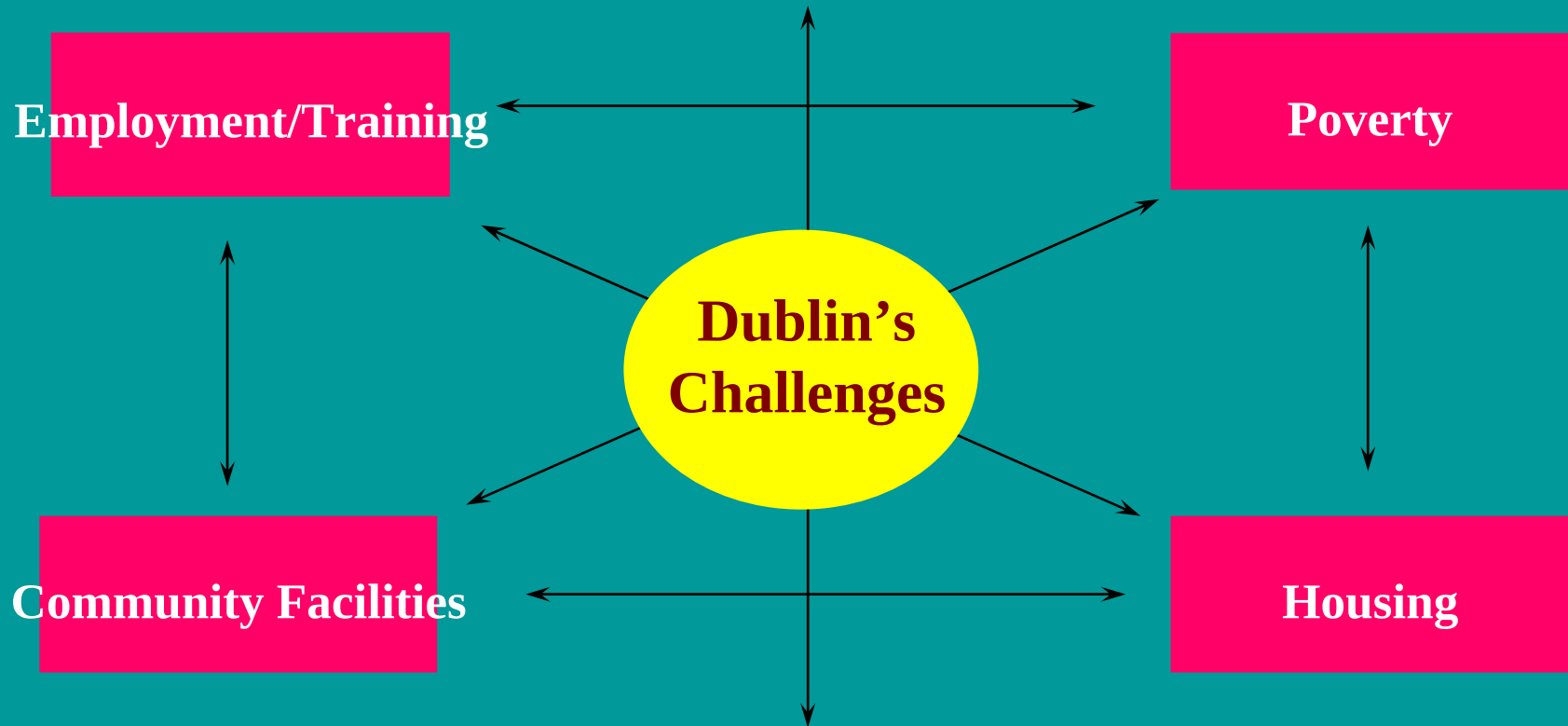


Community facilities

- Childcare/Creche facilities
- Enterprise Centres
- Parks
- Recreation facilities
- Sports facilities
- Arts facilities



Physical Infrastructure



Transport Infrastructure

Addressing the
challenges -
National policies

Dublin Regional Authority

Transport 21



Greater Dublin Area Rail Network





National Development Plan 2007-2013

Allocation of €184 billion over 7 years

Basis of Investment -

- The evident need to tackle infrastructure deficits in transport, housing, etc.
- Demographic projections which estimate a population in excess of 5million by 2021



Overall Plan Investment

- **Economic Infrastructure** = €54,660 bn
- **Enterprise, Science and Innovation** = €20,006 bn
- **Human Capital** = €25,796 bn
- **Social Infrastructure** = €33,612 bn
- **Social Inclusion** = €49,636 bn



The Dublin Gateway

- The Plan acknowledge that the Dublin Gateway is, in terms of scale and international significance, **on a different level to that of the other Gateways** in Ireland
- The NDP states that the **Dublin Gateway will be the focus of significant investment** to ensure that it can improve its position as Ireland's International Gateway
- The NDP's strategy for the Dublin Gateway is **to support a strong and competitive GDA**

Addressing the
challenges -

Regional / Local
policies



- **Greater Dublin Regional Planning**
- **Greater Dublin Retail Strategy**
- **Strategic Development Zones**
- **Local Area Plans**

