



# FINGAL DEVELOPMENT PLAN 2023–2029

**DRAFT PLAN  
SUPPLEMENTARY INFORMATION**

**FINGAL ECONOMIC AND  
EMPLOYMENT LAND  
USE STUDY**



# 1 Introduction

## Contents

1	Introduction	1
1.1	Overview	1
1.2	Scope	2
1.3	Structure	3
2	Approach	4
2.1	The Study Area	4
2.2	Methodology	6
2.3	Limitations and assumptions	6
3	Policy Context	7
3.1	Project Ireland 2040: National Planning Framework (NPF)	11
3.2	Eastern & Midland Regional Assembly Regional Spatial & Economic Strategy 2019-2031 (RSES)	14
3.3	Dublin Metropolitan Area Strategic Plan (MASP)	17
3.4	Dublin Enterprise Zone	23
3.5	Dublin Enterprise Plan up to 2020	24
3.6	Making Remote Work National Remote Work Strategy 2021	26
3.7	Enterprise Ireland's Strategic Priorities 2021	27
3.8	IDA - Driving Recovery & Sustainable Growth Strategy 2021-2024	28
4	Baseline Assessment	31
4.1	Socioeconomic profile of Fingal	31
4.1.1	Introduction	31
4.1.2	Population	31
4.1.3	Future Population and Labour Force	33
4.1.4	Housing	37
4.1.5	Education	40
4.1.6	PC and Internet Connectivity	41
4.1.7	Commuting	43
4.1.8	Employment	45
4.2	Zoning and Land Use in Fingal	51
4.2.1	Fingal land use and zoning	51
4.2.2	Enterprise land use zonings	53
4.2.3	Strategic Infrastructure Development	65
4.2.4	Conclusion	67
4.3	Enterprise activity within Fingal	68
4.3.1	Introduction	68
4.3.2	Enterprises Summary	68
4.3.3	Sectoral Mapping	70
4.3.4	Enterprise Cluster Mapping	73
4.3.5	Commercial Vacancy	105
4.4	Employment in Fingal	107
4.4.1	Introduction	107

# 1 Introduction

4.4.2	Functional economic areas (FEA)	114
5	Sectoral Review Summaries	126
5.1	The Agricultural and Agri-food Sectors	127
5.2	Manufacturing Sector	130
5.3	ICT and Financial Services Sector	132
5.4	Healthcare and Pharmaceutical sector	135
5.5	The Retail Sector	138
5.6	The Tourism Sector	143
5.7	The Aviation Sector	147
5.8	Marine Sector	149
5.9	The Green Economy	152
5.10	The Rural Economy	154
5.11	Other Sectoral Activity	155
6	Emerging Trends – Economy and Employment	156
6.1	COVID-19	156
6.2	Brexit	160
6.3	Infrastructure Development	164
7	Summary	171
7.1	SWOT	171
7.2	Conclusion	173

# 1 Introduction

## 1 Introduction

### 1.1 Overview

This report has been prepared by KPMG Future Analytics on behalf of Fingal County Council to describe the economic and employment profile of Fingal and its land use based on the latest available data.

The report has been prepared in support of the ongoing preparation of the Fingal Development Plan 2017 -2023. It provides desk-based quantitative evidence-based analysis in relation to the economic and employment indicators, land use and industry clustering in Fingal County Council. Specifically, the study will critically analyse the employment and land use patterns across the county taking account of the drivers of economic growth, emerging trends and their spatial manifestations.

In turn, this will provide the basis for an analysis of the current general employment and zoning objectives, associated land use types, quantum and locations. The review will take account of Fingal's context both regionally and nationally and the relevant objectives of the National Planning Framework (NPF) and the Regional Spatial and Economic Strategy (RSES).

The preparation of the 2023-2029 Development Plan takes place within a unique period of significant economic uncertainty. The ESRI has concluded that overall, 2020 will see the most profound decline in domestic sources of growth for the Irish economy on record. Both consumption and investment are forecast to witness falls of approximately 9 and 14 per cent respectively. Unemployment, which had at the start of year averaged less than 5 per cent, is now set to average 18 per cent for the year. This constitutes a dramatic reversal of recent Irish economic trends. However, for 2020, the ESRI forecasts indicate that the Irish economy, in GDP terms, will grow by 3.4 per cent. This upward revision to the GDP forecast is due to the export sector, which has registered an exceptional performance in the year. Despite the lockdown in the first half of 2021, a significant recovery in domestic sources of growth is forecast with consumption, in particular, registering growth of just under 12 per cent. The export sector is also likely to consolidate its 2020 performance and increase by 6 per cent next year. Overall, this results in output growth of 4.9 per cent in 2021.

Therefore, economic planning for Fingal must balance the unprecedented events and economic shock of the past year with an expectation that the economy will recover to some extent in a return to some type of normality in the long-term. The

# 1 Introduction

Development Plan faces the challenge of responding proactively to circumstance but provide for built in resilience and sustainability.

## 1.2 Scope

This report provides the results of a data driven analysis of the socioeconomic characteristics, economic and employment indicators, enterprise activity, zoning and land use, jobs and employment density and sectoral reviews. This analysis has been provided to support the ongoing preparation of the Fingal Development Plan 2023-2029.

This report focuses on the socioeconomic baseline in Fingal County Council as it relates to the economy and employment using data sources such as the 2016 Census, Geodirectory and other supplementary datasets. The data applied covers a range of spatial levels within Fingal itself, such as the settlement hierarchy as well as the wider context with regards employment industries and sectoral activity at regional and national level.

Specifically, the indicators analysed throughout relate to population, housing, education, connectivity, commuting, employment, industrial zoning, enterprise activity, enterprise clustering, job density, functional economic areas and sectoral activity.

# 1 Introduction

## 1.3 Structure

This report provides the wider context across Fingal as well as both settlement-specific analysis and sector-specific analysis and as such has been structured to address the following:

- Chapter 2 describes the approach to this assessment including the geographic scope of the Study Area (Section 2.1), the methodology (Section 2.2) and any relevant limitations and assumptions that have influenced the analysis (Section 2.3);
- Chapter 3 sets out the supporting policy context relating to the National Planning Framework and Regional Spatial and Economic Strategy as well as other enterprise and sustainable growth policies.
- Chapter 4 provides the socioeconomic profile including economic and employment baseline indicators across Fingal.
- Chapter 5 provides a series of sectoral reviews across Fingal ranging from the agriculture to tourism and the green economy.
- Chapter 6 provides contextual information as to the emerging trends of impacts on employment and economic due to COVID-19, Brexit and infrastructure development.
- Chapter 7 presents key findings, a SWOT analysis (Section 7.1) and concluding commentary (Section 7.2).

## 2 Approach

## 2 Approach

### 2.1 The Study Area

Fingal County Council is on the eastern coast of Ireland within County Dublin and the administrative boundary of the Eastern and Midland Regional Assembly. Fingal is one of four local authorities within County Dublin and is situated within the north stretching from the outskirts of Dublin City in the south, as far north as Balbriggan, with the eastern coast stretching from the Irish Sea and up to the Louth border. Fingal shares a western border with Meath as far as Ashbourne in the northwest and Leixlip in the southwest. This is illustrated in Figure 2-1.

An overview of the settlement hierarchy within Fingal is set out in Table 2-1 including identification of those settlements that have been considered as part of the clustering and functional economic area analysis.

Table 2-1 Settlement hierarchy in Fingal as per Variation 2 of the Fingal Development Plan 2017–2023

Settlement hierarchy	Settlement	Settlement-specific analysis undertaken
	<b>Dublin City and Suburbs Consolidation</b>	
Metropolitan area	<b>Area:</b> Blanchardstown, Baldoyle, Castleknock, Clonsilla, Howth, Mulhuddart Village, Sutton, Santry (Incl. Ballymun), Balgriffin and Belcamp, Charlestown and Meakstown	
Key town	Swords	Analysis undertaken
Other metropolitan areas	Portmarnock, Baskin	
Self-sustaining growth towns	Donabate	
Self-sustaining towns	Malahide, Balbriggan, Lusk, Rush, Skerries	
Towns and villages	Portrane, Coolquay, Kinsealy, Rivermeade, Rolestown	No detailed analysis undertaken
Other core towns and villages	Balrothery, Loughshinny, Ballyboughal, Naul, Balscadden, Oldtown, Garristown, Ballymadun	
Rural	Other areas	

## 2 Approach

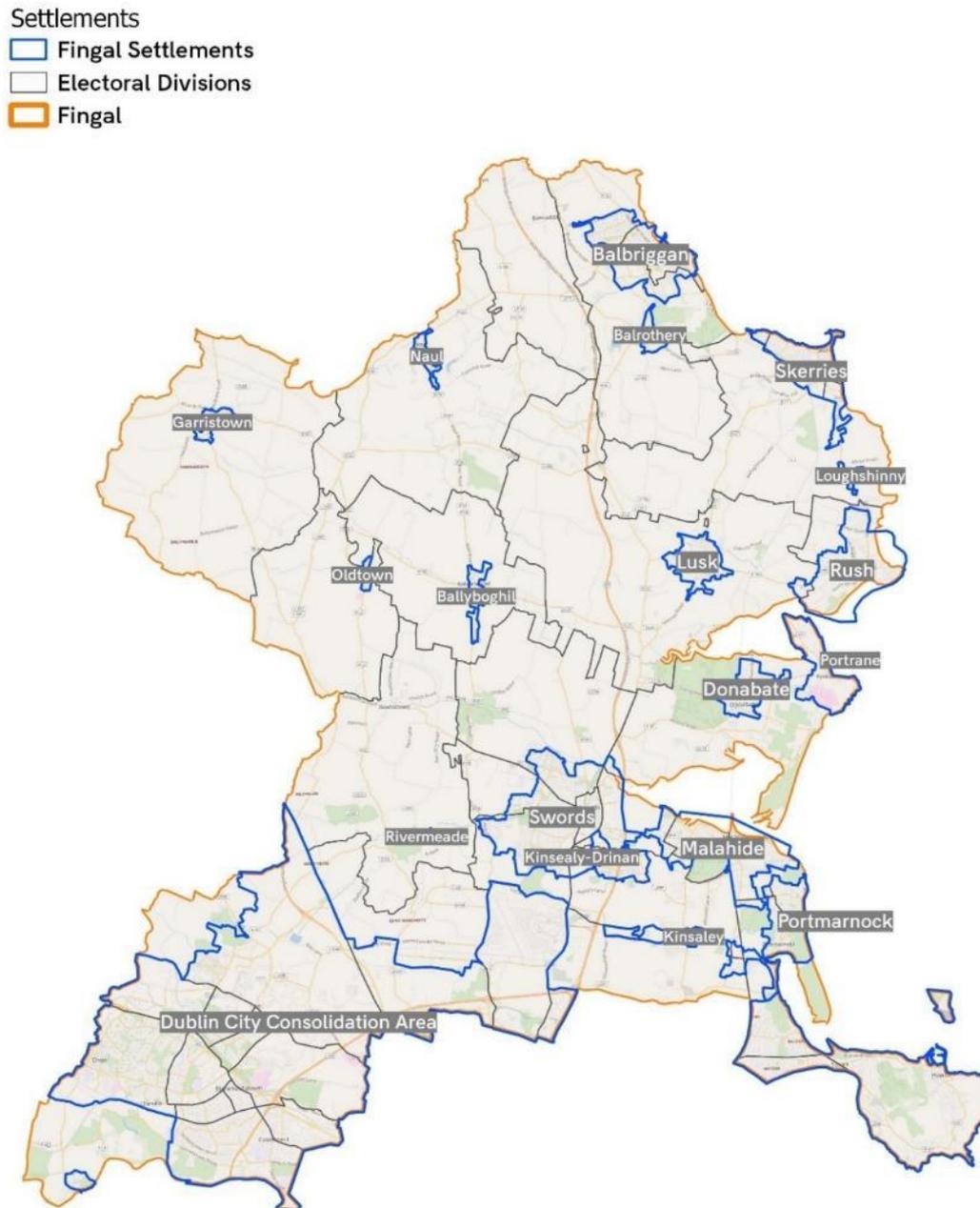


Figure 2-1 Overview of Fingal County Council

## 2 Approach

### 2.2 Methodology

The economic indicators have been primarily sourced from the Central Statistics Office (CSO) census records. Specifically, data has been derived from the 2016 Census to serve as the socioeconomic baseline for the analysis (as it is the latest comprehensive dataset).

For the analysis of functional economic areas and employment, the primary data source was the Census data along with the Place of Work, School or College - Census of Anonymised Records (POWSCAR) dataset from the CSO. This data provides an indication of movement of people and related socioeconomic indicators. POWSCAR data provides point-level information relating to household socioeconomics allowing fine grain analysis of custom catchments. This enables detailed analysis of the socioeconomic profile of individual areas and analysis of population by location of residence and by employment destination.

POWSCAR data, given its granularity has in several circumstances been suppressed in representation in the analysis outputs. That is that they have been intentionally obfuscated for the protection of individuals anonymity.

GeoDirectory data, which is a complete database of all buildings in the Republic of Ireland and their use and geolocation, has also been analysed across Fingal. The GeoDirectory data used for this assessment is based on the final quarter of 2020 which is the latest complete dataset. This analysis has considered properties defined as commercial and both (i.e. both commercial and residential) and as categorised by NACE codes (which is the EU business activity operation classification scheme). This enables understanding and mapping of commercial properties by NACE codes to investigate business use, vacancies, industries etc.

Further datasets relating to land use and infrastructure development have been provided by Fingal County Council for examination.

Further publications and relevant literature have been researched to support analysis of industries, sectors, trends and developments.

### 2.3 Limitations and assumptions

All relevant assumptions and limitations in relation to data have been documented herein and the assessment has been undertaken using primarily secondary data (i.e. Census and POWSCAR 2016, Geodirectory etc.). Unless otherwise stated, it can be assumed that all data herein relates to April 2016 (i.e. the date of the latest Census).

## 3 Policy Context

### 3 Policy Context

Development Plans incorporate economic policy in order to facilitate investment, development, and jobs growth and where possible stimulate activity within the administrative area. Policy makers face the challenge of aligning town planning objectives with economic trends so as to position the county to essentially capture opportunities that support and sustain investment and employment.

The Fingal Development Plan 2023-2029 must respond to the policy hierarchy set out in the National Planning Framework (NPF) and the Regional Economic Strategy (RSES), as well as taking account the current economic shocks to the system arising from Brexit, and the COVID-19 Pandemic crisis and associated economic lockdowns. The trends affecting employment lands over the life of the current plan needs resilient economic strategy to plan for the unexpected. In particular;

- Economic policy should support the provision of a highly interconnected “ecosystem” of entrepreneurs and investors, technologists, and innovators<sup>1</sup>.
- **Agile Economic policy** to allow short-term response to challenges of COVID-19 Pandemic related lockdowns, high unemployment and hard hit service and retail sectors.
- Fingal Economic policy should recognise four contexts that shape urban economic development: **economic, institutional, innovative and interactional, and political.**
- **Clustering and Agglomeration** (and layering) of specialisms as cornerstones of economic development: proactively linking uses and activities in policy both in geographic locations, technologies and economic anchors (health, manufacturing, pharma, tourism)<sup>2</sup>.
- **NPF NSO 5:** Fingal Development Plan shall support implementation of National Strategic Outcome 5; to enable A Strong Economy, supported by Enterprise, Innovation and Skills This will depend on creating places that can foster enterprise and innovation and attract investment and talent.
- **NPF NPO 5:** Fingal Development Plan shall deliver on ***National Policy Objective 5 Develop cities and towns of sufficient scale and quality to***

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<sup>1</sup> OECD (2019), SME and Entrepreneurship Policy in Ireland, OECD Studies on SMEs and Entrepreneurship, OECD Publishing, Paris, <https://doi.org/10.1787/e726f46d-en>.

<sup>2</sup> World Economic Forum (2020). The Future of Jobs Report 2020

### 3 Policy Context

*compete internationally and to be drivers of national and regional growth, investment and prosperity.*

- **RSES:** Fingal Economic strategy shall provide smart specialisation and clustering policies to develop a strong economic base in the Region, underpinned by investment in 'placemaking' to create places that are attractive to live, work, study, visit and invest in.
- **MASP:** Fingal Economic policy to enable the North-South Corridor which identifies strategic development and employment areas for population and employment growth in addition to more generalised consolidation and re-intensification of infill, brownfield and underutilised lands identified:
  - Focus on the vision for Swords town and creating greater transportation linkages through Metrolink to unlock significant long-term capacity in Swords-Lissenhall and in South Fingal at Dublin Airport.
  - Development of high-tech research and development employment within a campus setting at Lissenhall East
- **Skills and Innovation:** Fingal Economic plan to facilitate RPO 6.25 to Support REPs, LEOs and local authorities to collaborate with the Regional Skills Fora managers, Higher Education Institutes, Education and Training Boards and local stakeholders to address skills shortages and lifelong learning challenges in the Region
- **Technology and Innovation Poles** – human capital; proximity to a third level institution; transport infrastructure; broadband infrastructure; and finally, a diverse local sectoral mix as being key factors in the development of start-ups<sup>3</sup>.
- **Enterprise centre** support to provide locally-based affordable work facilities and improve employment opportunities for local communities.
  - Drinan Enterprise Centre, Swords Enterprise Park, Feltrim Road, Swords, Co. Dublin
  - BASE Enterprise Centre, Damastown Road, Mulhuddart, Co. Dublin
  - BEaT Enterprise Centre, Robert Beggs Building, Stephenstown Industrial Estate, Balbriggan, Co. Dublin

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<sup>3</sup> OECD (2019), SME and Entrepreneurship Policy in Ireland, OECD Studies on SMEs and Entrepreneurship, OECD Publishing, Paris, <https://doi.org/10.1787/e726f46d-en>.

### 3 Policy Context

- **SMART cities:** truly smart cities use technology make life easier for residents and business. This includes how and where they spend their time. The recent Smart Balbriggan initiative (2020) aims to ensure that Balbriggan benefits from 'smart' and 'digital' projects focussing on 1) community building, 2) job creation and economic growth, and 3) improved services and public realm, all building the towns identity as a forward-thinking, young and dynamic place to live, work and visit.
- **Remote Working** - Traditional economic models, assume that 'jobs follow people' when it comes to household locational behaviour and that people follow jobs, when it comes to firms' locational behaviour. The growth in remote working brings a new dynamic to locational decisions. It is forecast that 22% of all full workdays in the U.S. will be supplied from home after the pandemic ends, compared with just 5% before. The workers themselves would like to stay home 44% of the time<sup>4</sup>.
- The Government's **Making Remote Work National Remote Work Strategy (2021)** fully supports this innovation, noting it has the potential to fundamentally change the nature of where, how, when and why people work. This in turn will bring about economic, spatial, environmental, cultural and societal change. The Government is committed to facilitating increased remote work adoption in a way that reaps the many benefits and mitigates negative side-effects. There is a commitment to 20% of remote working for the public sector. Remote working is not just working from home – offers potential for hubs at neighbourhood level.
- **Rethinking office space:** The pandemic has fundamentally challenged the dependence on the office workspace. While offices will remain a fundamental part of the urban environment – NPF and RSES and agencies such as the IDA are clear that this will not entail the development of nowhere sprawl, but high-quality city and towns. Economic policy should proactively direct office and commercial development to town centres at various scales.
- **Online shopping and E-Commerce**<sup>5</sup> were certainly not born out of the pandemic, but the pandemic has elevated consumer adoption and reliance in ways that would have otherwise taken years. Consequently, brands and retailers need to innovate to meet elevated expectations.

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<sup>4</sup> Justin Fox (Bloomberg.com) The New Battles to Come Over Working from Home, It's clear that lots more people will be doing their jobs remotely after the pandemic, but who, where and how often? 17 December 2020

<sup>5</sup> <https://www.nielsen.com/us/en/insights/article/2020/convenience-2-0-an-online-twist-to-a-retail-stalwart/>

### 3 Policy Context

- **Comparison Retail and Services lockdown** - While convenience retail has flourished in in 2020, comparison sectors and services (i.e. clothes retailing, hairdressers etc). The pandemic has unevenly affected the economy and socio-economic groups.
- **From the city to the suburbs**<sup>6</sup> The pandemic will likely accelerate the pull of the suburbs for families while pushing young people and businesses into more affordable urban areas. One set of forces, enabled mainly by newly acquired fears of crowded buses, trains, stores and parks—a kind of collective ochlophobia—will act to pull some people, mainly families with children, out of urban centres and into their suburban and rural peripheries. Cities will get even younger as urban centres become more affordable.
- Fear of commuting may also keep some offices and jobs in the suburbs for an interim period, temporarily slowing the shift in corporate locations from suburban campuses to central city business districts. This may invoke repurposing older office parks or even defunct malls as regional office centres.
- **The Green Economy** Sustainable Development is at the heart of the IDA's new development strategy and central to the World Bank, OECD, UN SDGs and World Economic Forum's agenda. Nationally, the National Climate Action Plan (CAP) 2019-2024 sets out a course of action to address the impacts of climate change on Ireland's environment, society, economic and natural resources.

Even in a year dominated by a global pandemic, the sustainability revolution has accelerated faster than expected, while also expanding to include a wider range of environmental and social issues.

With consumers and investors demanding significant change, profit pools shifting away from incumbents to insurgents, and even the most carbon-heavy companies making net-zero pledges, executives ignore this revolution at their peril. The WEF call it 'a real revolution'. With every industry—nearly every product and most of our habits under scrutiny.<sup>7</sup> For modern economies, and leading global companies, sustainability in all its forms is now a competitive necessity and, if embraced, a significant opportunity. Sustainability – across environmental, social and governance (ESG) factors – is therefore a common theme throughout The IDA's Driving Recovery and Sustainable Growth.

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<sup>6</sup> Richard Florida (2020) The Forces That Will Reshape American Cities, Bloomberg CityLab, July 2020  
<https://www.bloomberg.com/news/features/2020-07-02/how-coronavirus-will-reshape-u-s-cities>

<sup>7</sup> <https://www.weforum.org/agenda/2021/01/davos-agenda-sustainability-digital-revolution/>

## 3 Policy Context

Typically planning policy interacts with economic initiatives or trends. It has regard to potential specialisations in labour or technology, infrastructure, sectoral synergies and with spatial agglomerations. Economic planning policy must reflect current thinking on economic development ranging from Smart Cities, Green and sustainable economies to key criteria for decision making at the local level.

The most obvious formal power that localities and (in many places) regional authorities have to affect economic development is in the regulation of land use and in major public investments, such as infrastructure. Land use and public investment decisions are thought by some economists to have strong effects on the conditions for labour market/business network formation and sustenance, and hence on specialisation<sup>8</sup>.

Economic policy at a macro level can also have a significant local impact. State-sponsored investment in Enterprise Zones and business parks align the delivery of serviced environment in order to facilitate economic activity. State, local authority or agency ownership of land banks is a clear illustration of this type of high-tech business park, R&D and logistical operations.

Fingal County Council sits within a hierarchy of national and regional policy development. This section reviews the current policy landscape as it applies to Fingal.

### 3.1 Project Ireland 2040: National Planning Framework (NPF)

The following key messages and National Policies from the NPF are highlighted as follows, built around National Strategic Outcome 5:

#### **National Strategic Outcome 5**

#### **A Strong Economy, supported by Enterprise, Innovation and Skills**

This will depend on creating places that can foster enterprise and innovation and attract investment and talent. It can be achieved by building regional economic drivers and by supporting opportunities to diversify and strengthen the rural economy, to leverage the potential of places.

Delivering this outcome will require the coordination of growth and place making with investment in world class infrastructure, including digital connectivity, and in skills and talent to support economic competitiveness and enterprise growth.

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<sup>8</sup> Why Does a City Grow? Specialisation, Human Capital or Institutions? Michael Storper, Urban Studies 2010 47: 2027

## 3 Policy Context

### Making Stronger Urban Places

The NPF strongly correlates economic development with urban and city development, agglomeration economies and skills development at Section 4:

#### Economy/Prosperity

- The type of place-making set out above is also critical to economic prosperity as globalisation continues to have a concentrating effect. Employment trends indicate that increasingly, city regions are the focal point for internationally mobile investment. High value added services are attracted primarily to urban areas, and cities are competing with other cities internationally.
- This means that many sectors, but in particular those related to the information economy and knowledge development, tend to be very place specific. High skilled individuals are attracted together, as firms' 'agglomerate' in the larger, denser, skilled labour markets found in urban areas.
- In addition to scale and density, this is dependent on the attractiveness of places to highly skilled potential employees as well as having a steady stream of local talent and innovation associated with third level research institutions. International connectivity is also important, where short travel times to an airport with a good choice of destinations is a critical factor.
- Domestically trading companies tend to be more distributed and locate where there is a local/regional demand for their services, but changing global circumstances mean that they too need to be agile to adapt through early innovation. This highlights the need to focus on upskilling and life-long learning throughout the regions, as well as supporting sectoral specialisation that has emerged at different locations.
- In an era when the nature of urban places is a critical factor in determining economic growth and regional development, we must ensure that there are a range of quality urban places in which people will choose to live, work and invest.

#### ***National Policy Objective 5***

Develop cities and towns of sufficient scale and quality to compete internationally and to be drivers of national and regional growth, investment and prosperity.

The NPF considers NPO5 will be achieved through:

- *Supporting entrepreneurialism and building competitive clusters;*
- *Sustaining talent and boosting human capital in all regions; and*
- *Digital and data innovation.*

## 3 Policy Context

### Sustaining Talent and Boosting Human Capital in all Regions

The NPF emphasises that the *development of human capital is central to Ireland's success and our economic and social development. The availability of well-educated, skilled talent is a fundamental driver of national competitiveness at both national and regional level.*

### Planning for Urban Employment Growth

At an urban scale, in cities and towns generally, it is important to identify locations where enterprises can access competitively priced development lands, utilities and commercial properties to the highest standards available internationally. Planning to accommodate strategic employment growth at regional, metropolitan, and local level should include consideration of:

- Current employment location, density of workers, land-take and resource/infrastructure dependency, including town centres, business parks, industrial estates and significant single enterprises;
- Locations for expansion of existing enterprises;
- Locations for new enterprises, based on the extent to which they are people intensive (i.e. employees/ customers), space extensive (i.e. land), tied to resources, dependent on the availability of different types of infrastructure (e.g. telecoms, power, water, roads, airport, port etc.) or dependent on skills availability;
- Locations for potential relocation of enterprises that may be better suited to alternative locations and where such a move, if facilitated, would release urban land for more efficient purposes that would be of benefit to the regeneration and development of the urban area as a whole, particularly in metropolitan areas and large towns.

### Achieving Urban Infill/ Brownfield Development (Section 4.5)

The National Planning Framework targets a significant proportion of future urban development on infill/brownfield development sites within the built footprint of existing urban areas. This is applicable to all scales of settlement, from the largest city, to the smallest village.

## 3 Policy Context

### ***National Policy Objective 11***

In meeting urban development requirements, there will be a presumption in favour of development that can encourage more people and generate more jobs and activity within existing cities, towns and villages, subject to development meeting appropriate planning standards and achieving targeted growth.

### **3.2 Eastern & Midland Regional Assembly Regional Spatial & Economic Strategy 2019-2031 (RSES)**

Dublin is within the Eastern and Midland Regional Assembly Area (EMRA) and the Regional Spatial and Economic Strategy (RSES) for this area sets out a strategic plan and investment framework to shape the development of, and manage planning in, the region. The RSES translates the NPF objectives and the growth and settlement strategy at the regional level, ensuing coordination between the NPF and the County Development Plan.

#### **RSES Vision**

The vision for the Region is a growth that is sustainable, competitive, inclusive and resilient. This requires the development of a strong economic base that is supported by enterprise, innovation and skills. The aim is for a vibrant and diversified enterprise base with strong and healthy clusters bringing disruptive technology innovations to national and global markets, with a responsive and efficient labour market.

RSES identifies **smart specialisation and clustering policies to develop a strong economic base in the Region, underpinned by investment in 'placemaking'** to create places that are attractive to live, work, study, visit and invest in. The need to future proof and address emerging global development and challenges, such as Brexit are also identified. Relevant Regional Policy Objectives are summarised as follows:

## 3 Policy Context



Figure 3.1. The Economic Strategy

### The Economic Strategy

- 1 **Smart Specialisation:** Smart specialisation is part of the EU's cohesion policy and the Europe 2020 Strategy that focuses on each region's strengths and the activities that support these strengths. As a place-based approach, it is characterised by the identification of strategic areas for intervention based both on the analysis of the strengths and potential of the economy and on an Entrepreneurial Discovery Process (EDP) with wide stakeholder involvement. IDA, EI, LEOs, SFI and all enterprise agencies as well as Regional Enterprise Plans (REPs) and Local Economic and Community Plans (LECPs), ensure industry, education institutions and communities play a key role in this entrepreneurial discovery process.

Smart specialisation focuses on boosting productivity, regaining lost competitiveness, increasing export intensity and diversity of markets, taking measures to improve our attractiveness as a location for investment either

### 3 Policy Context

national or foreign, and to increase our entrepreneurial activity. Smart specialisation also recognises that supporting strong and dynamic enterprises and investing in Science, Technology and Innovation will accelerate the economic and societal return on investment.

- 2 Clustering:** These are initiatives that create, maintain, or upgrade an economic stronghold, by strengthening linkages or facilitating collective action to improve the cluster-specific business environment. Modern cluster policies aim to put in place a favourable business ecosystem for innovation and entrepreneurship in which new players can emerge and thus support the development of new industrial value chains and emerging industries. Clusters are more a reflection of cross-industry linkages and 'related diversification' than of narrow specialisation. Clusters in the vast majority of cases are not 'created', rather they emerge, because different locations provide different types of opportunities for specific companies to invest, succeed and grow. Clusters are the result of a cumulative process, take a long time to develop and are inherently unpredictable. Nevertheless, the State can play a facilitative and supportive role.

There is potential to further strengthen collaboration and clustering activities between foreign and Irish owned enterprises, and between enterprises, Higher Education Institutions (HEIs), and the research base.

- 3 Orderly Growth:** Though the identification of locations for strategic employment development in line with our Growth and Settlement Strategy, compact growth will be achieved. This involves managing and facilitating the growth of Dublin and to increase the scale of our Regional Growth Centres to be able to provide the range of functions to their hinterlands.

This needs to be facilitated by appropriate, effective and sustainable infrastructure development in these centres, and at the same time avoid sprawl. This encompasses connectedness aimed at facilitating a network of skills and talent living in our settlements. It requires a support network of infrastructure - including broadband - in order to make the Region more connected and competitive. This will help to deliver high quality jobs that are well-paid and sustainable.

- 4 Placemaking:** From an enterprise development perspective, investment in the creation of place is key to realising regional potential. Business leaders and entrepreneurs make the decision about where to establish, invest or expand. Internationally, and in Ireland, the trend is increasingly toward urban areas of scale and concentrations of economic activity. The global environment has

## 3 Policy Context

become increasingly competitive – not only in terms of attracting Foreign Direct Investment (FDI), but also in terms of the challenges facing our Irish owned enterprises as they aim to gain a foot-hold in or diversify their export markets.

- 5 **Future Proof and Risk Management:** With emerging global development and challenges, such as Brexit, tax developments, trade wars, it is important to constantly foresee and horizon scan to identify unforeseen challenges and be ready to act upon them accordingly.

### 3.3 Dublin Metropolitan Area Strategic Plan (MASP)

The RSES includes a more detailed Dublin Metropolitan Area Strategic Plan (MASP) which identifies strategic development and employment areas for population and employment growth in addition to more generalised consolidation and re-intensification of infill, brownfield and underutilised lands within Dublin City and its suburbs. The MASP directs future growth to identified Strategic Development Areas located on existing and planned strategic public transport corridors.

Fingal County Council is located in the North-South Corridor and the MetroLink – Luas Corridor.

#### **North - South Corridor**

The DART Expansion Programme will support ongoing large-scale urban expansion of the North Fringe lands and Donabate to the north, and south to Woodbrook - Shanganagh, and the expansion of Bray to Fassaroe and Old Conna linked to improved public transport connections.

#### **MetroLink – Luas Corridor**

The proposed Metrolink will unlock significant long-term capacity in Swords-Lissenhall and in South Fingal - Dublin Airport, subject to protection of airport access. Proposed upgrades to the LUAS Green line will support development at Sandyford, Cherrywood and Ballyogan.

MASP sets out the following objectives for the corridor:

- Focus on the vision for Swords town and creating greater transportation linkages through Metrolink to unlock significant long-term capacity in Swords-Lissenhall and in South Fingal at Dublin Airport.
- Development of high-tech research and development employment within a campus setting at Lissenhall East

### 3 Policy Context

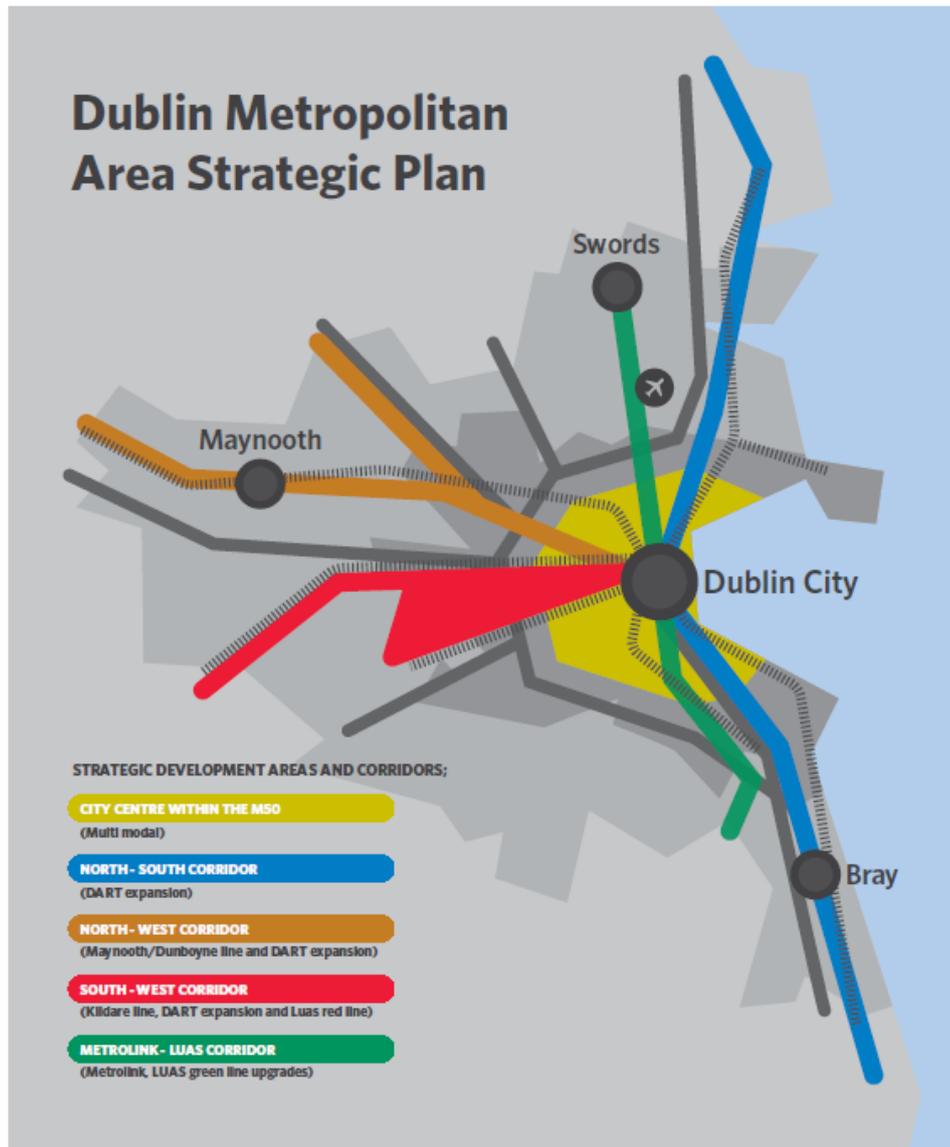


Figure 3.2: MASP Strategy

The Economic Strategy sets out Guiding Principles for the location of strategic employment areas (under RPO 5.6):

#### **MASP Employment lands**

**RPO 5.6:** The development of future employment lands in the Dublin Metropolitan Area shall follow a sequential approach, with a focus on the re-intensification of employment lands within the M50 and at selected strategic development areas and provision of appropriate employment densities in tandem with the provision of high quality public transport corridors.

### 3 Policy Context

These Guiding Principles direct that lands that include access to;

- **suitable locations** (depending on the extent to which an enterprise is people or space intensive or subject to environment constraints);
- **serviced sites** (based on whether an industry is dependent on a particular infrastructure such as energy, water, transport or communications networks);
- **connectivity** (including access to international markets that requires proximity to an airport/port);
- **skilled labour force** (proximity to third level education and lifelong learning) and
- **local strengths** (a diverse sectoral mix, research, innovation and technology centres, start-up hubs and incubators, emerging clusters or cross industry value chains),

The RSES has identified the following strategic employment areas in Fingal County:

Swords	<p>Sequential development of strategic residential sites within Swords and development of Oldtown-Mooretown lands</p> <p>Airport related, commercial facilities and employment linked to development of Metrolink</p> <p>Development of high-tech research and development employment within a campus setting at Lissenhall East</p>
North Fringe	<p>Large scale urban expansion creating new communities at Clongriffin-Belmayne (Dublin City) and Baldoyle-Stapolin (Fingal)</p> <p>Completion of mixed-use districts with retail and service provision</p>
Donabate	<p>Significant residential capacity in this strategically located rapidly growing coastal village</p> <p>Consolidation of economic and service base in tandem with population growth</p>
Dunsink	<p>A major greenfield landbank with long term potential to develop a new district centre</p>

### 3 Policy Context

The RSES identifies the region's challenges as the need to sustain economic growth whilst transitioning to a low carbon society and the requirement to align population growth with the location of homes and jobs whilst creating healthy attractive places and an enhanced quality of life. In response, the RSES is underpinned by **three key principles: placemaking, climate action and sustainable economic opportunity and growth.**

Relevant Regional Planning Objectives are noted:

#### **Competitive and Resilient Economic Base**

**RPO 6.1:** Support the national economic agencies, Local Enterprises Offices, Regional Enterprise Plan Steering Committees, local authorities and other relevant stakeholders, with their plans for job creation and enterprise development with an emphasis on:

- an enterprise base with increased productivity and more diversification including diversification of their markets - with high levels of innovation, skills adaptability, and relatively low costs of doing business.
- maintaining full-employment with unemployment rates of each Strategic Planning Area not exceeding the State average by more than one percentage point
- applying the Guiding Principles for strategic employment and investment prioritisation in placemaking for enterprise development presented in this RSES.

#### **Unexpected Opportunities for Enterprise Development**

**RPO 6.2:** Support local authorities to ensure their LECPs and city and county development plans are sufficiently agile to account for unexpected opportunities, to accommodate valid propositions for enterprise development that may emerge and for which there are strong locational drivers that do not apply to the same extent elsewhere.

### 3 Policy Context

The RSES reflects the NPF's emphasis on urban development and renewal's correlation with economic growth:

#### **Town Centre Renewal**

**RPO 6.12:** Local authorities shall include objectives in development plans and local area plans supporting emphasis on placemaking for town centres, for example through inclusion of a Placemaking Strategy for towns and implementation of Town Centre Renewal Plans.

**RPO 6.13:** Local authorities shall support the preparation of Design Guidelines to provide for improvements in the appearance of streetscapes and for revitalising vacant spaces for example with cost effective, temporary uses that build on the longer-term vision for space.

**RPO 6.14:** EMRA will support the use of targeted financial incentives to re-establish the dominant role of town centres provided for in planning policy to encourage a greater take up of town centre development opportunities for retail, residential, commercial, and leisure uses.

Economic growth is driven by productivity growth which in turn is underpinned by skills, innovation, infrastructure, trade, and our enterprise ecosystem.

The RSES identifies the importance of Skills and Talent, education and training institutions, and delivery of identified skills needs (as advised by National Skills Council (NSC) and Regional Skills Fora managers). It is noted that the national lifelong learning rate is below the European average and there are particular shortfalls amongst the employed, workers over the age of 35 and those who do not hold a third level qualification.

Education and Research are correlated with Innovation. The DBEI Disruptive Technologies Innovation Fund (DTIF) aims to encourage collaboration in science, technology and innovation to increase our innovation capacity, and it draws from the Research Priority Areas 2018-2023. The Region is home to a wide range of organisations engaged in innovation, such as education institutions and research centres.

## 3 Policy Context

### Skills and Innovation

**RPO 6.25:** Support REPs, LEOs and local authorities to collaborate with the Regional Skills Fora managers, Higher Education Institutes, Education and Training Boards and local stakeholders to address skills shortages and lifelong learning challenges in the Region.

**RPO 6.26:** Support and foster the collaboration of industry and research to identify areas of research, development and innovation, and to identify projects for funding.

**RPO 6.27:** Support community and adult education providers who are already providing formal and nonformal education to targeted disadvantage groups and who have already identified the barriers to participation in lifelong learning such as childcare, transport and rural isolation to increase participation rates and support progression into further education and employment.

### Social Enterprise

**RPO 6.28** Support local authorities in the design, development and roll-out of social enterprise practices, with a strong emphasis on collaboration.

The **Smart City** is a concept, where digital technology embedded across all urban functions. A systematic integration of ICT in the planning, design, operations and management of our cities, towns and villages for the benefit of the citizen is promoted.

### Technology and Innovation Poles – Anchors:

#### Regional Scientific Centres

**RPO 6.29:** Support the development of sites where high-tech and high potential start-ups (HPSU) can thrive, in conjunction with IoTs and Universities, to create collaborative and innovative growth.

#### Smart Cities, Towns and Villages

**RPO 6.30:** Support existing smart city initiatives such as Smart Dublin and the All Ireland Smart Cities Forum and support the development of smart city programmes in Athlone, Dundalk and Drogheda.

### 3 Policy Context

It is an aim of the RSES to create a business environment that is conducive to business start-up, including SMEs, and sustaining growth throughout all phases of their lifecycle. EMRA will aid and support enterprise development agencies in the removal of obstacles to starting a business, and to seek ways in which risk can be minimised, to ensure that starting a business is considered to be a valid career option.

In order to gain the maximum return on investment, a series of factors needs to be borne in mind that will maximise the likelihood of new business formation and continued success of existing businesses. **The evidence points to the availability of human capital; proximity to a third level institution; transport infrastructure; broadband infrastructure; and finally, a diverse local sectoral mix as being key factors in the development of start-ups.**

#### **Innovation Capacity**

**RPO 6.31:** Support enterprise development agencies and LEOs in their efforts to increase business innovation capacity, to create a distributed network of coworking hubs, to promote Ireland's Edge to strengthen linkages between Irish-owned enterprises and foreign owned enterprises, and to support existing Irish entrepreneurs and to attract overseas entrepreneurs.

#### **Ecosystem Performance**

**RPO 6.32:** Support enterprise development agencies to map, monitor and evaluate the Region's enterprise and innovation ecosystem, benchmarking against other relevant jurisdictions nationally and internationally.

#### **Infrastructure Investment**

**RPO 6.33:** With the allocation outcomes from the competitive calls EMRA, in cooperation with the Department of Public Expenditure and Reform (DPER), will prepare a Regional Investment Plan for the Region in accordance with Project Ireland 2040 and the Public Spending Code.

#### 3.4 Dublin Enterprise Zone

The Dublin Enterprise Zone or DEZ is an area of around 1571 hectares, located in Blanchardstown, Dublin 15 and is home to a variety of industries from R&D, High-Tech Manufacturing, Industrial, General Enterprise and Employment. While half of the Dublin Enterprise Zone has been developed, there is the potential to create an

### 3 Policy Context

additional 20,000 jobs on the 716 hectares of undeveloped, zoned and serviced land available in the Zone.

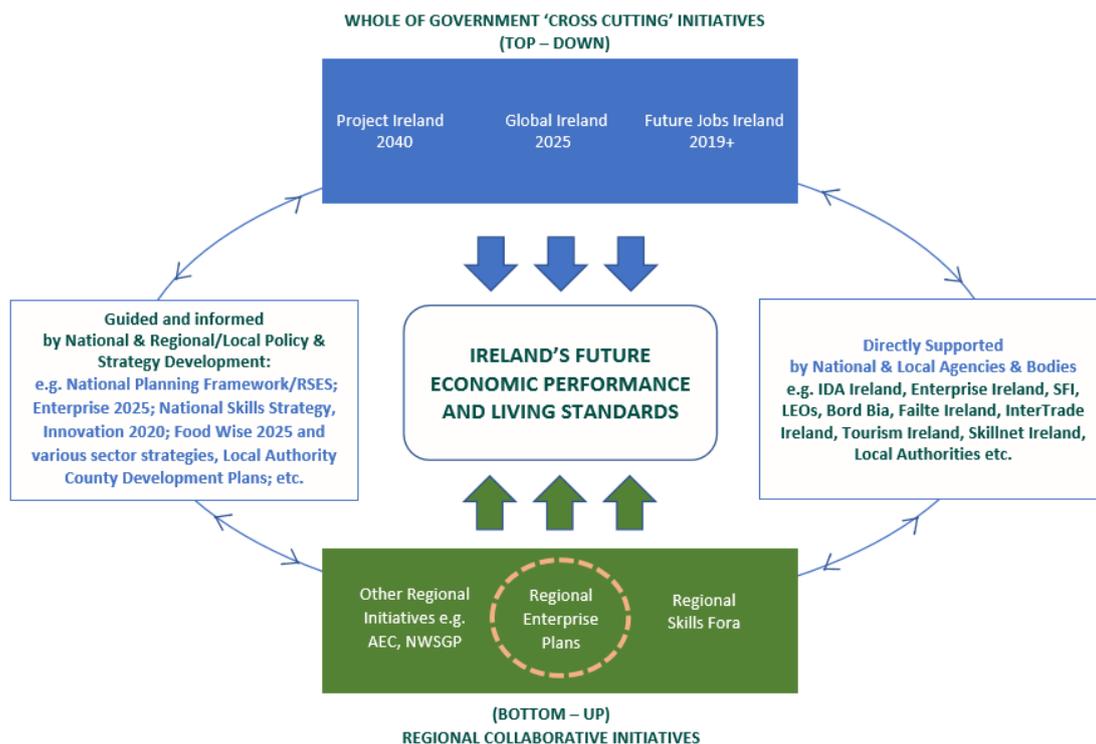
The Dublin 15 location has many benefits for business, being situated very close to Dublin Airport accessible via the M50, which runs right through the Dublin Enterprise Zone. The M50 Motorway also links to Dublin Port via the Port Tunnel on the M1. There are five separate Dublin Bus routes traversing the Zone. These transport links provide any Enterprise or business located in the Dublin Enterprise Zone Exceptional access to goods & services. The majority of businesses are indigenous, playing a crucial role in the development of the area. Pallas Foods constructed a 33,000 m<sup>2</sup> warehousing facility on a site of 16 hectares within the Enterprise Zone. Alexion Pharma International constructed a 15,000 sq. m. development comprising offices, laboratories, and warehousing on a site in excess of 16 hectares. Alexion also announced the further development of a 20,000 sq. m. new biologics manufacturing facility at College Business Park in Blanchardstown

The Dublin Enterprise Zone has a population of 100,000 people and is a national economic asset that is home to over 800 businesses including IBM, Alexion, Mallinckrodt, PayPal, Symantec and Westpharma. Fingal County Council is dedicated to providing a pro-business environment with considerable investments having been made in the Dublin 15 region, as well as the continued commitment to investing and promoting the DEZ to attract foreign and domestic direct investment.

#### 3.5 Dublin Enterprise Plan up to 2020

The Dublin Enterprise Plan is briefly highlighted, as it highlights that economic development strategy derives from 'Whole of Government 'Cross Cutting' Initiatives' and 'bottom-up' Regional Collaboration initiatives. The IDA and Enterprise Ireland are developing their strategies for the world in 2021 as a response to long-term trends and short term challenges.

### 3 Policy Context



The Dublin Enterprise Plan also highlighted that Economic Strategy is articulated and implemented through a broad number of agencies and policy documentation.

#### Local Enterprise Offices

The Local Enterprise Offices (LEOs) in every county are the ‘first-stop-shop’ for providing advice and guidance, financial assistance and other supports to those wishing to start or grow their own businesses. In the first instance, the LEOs provide a ‘signposting’ service in relation to all relevant State supports. The LEOs can also offer advice and guidance in areas such as Local Authority rates, Public Procurement and other regulations affecting business.

The LEOs can offer grant aid to microenterprises in manufacturing and internationally traded services sectors which have the potential to develop into strong export entities, in addition to ‘soft’ supports in the form of training, a mentor to work with the business proposer, or targeted programmes such as Lean for Micro (to help boost business productivity and competitiveness).

#### IDA Ireland in the Dublin region

Dublin, as our capital city has a key role in attracting FDI to the country. From an FDI perspective, it is important that Dublin continues to be a dynamic city that remains attractive for companies seeking a location of international scale for their

## 3 Policy Context

global operations. Dublin as the largest metropolitan area in the country enjoys a strong profile internationally as a location of choice for MNCs searching for a European base.

Competition for FDI is both intense and global and there is a continuing trend of FDI locating in larger urban areas. It is critical that the planning and development of Ireland's capital city creates a world-class urban area that continues to attract not only international investment but also international talent.

### Strategic Objectives

- 1 Ensure the availability of skills and talent to realise Dublin's future economic potential
- 2 Increase enterprise engagement in innovation, research and development to ensure Dublin's continued competitiveness and productivity
- 3 Build a pipeline of sustainable and scalable start-ups in Dublin and provide quality support
- 4 Strategically build on existing activities to enhance the attractiveness of Dublin as a region to live, work, invest and visit
- 5 Facilitate every individual to realise their full potential through engagement in economic activity
- 6 Support Dublin enterprises to adapt to more sustainable practices

### 3.6 Making Remote Work National Remote Work Strategy 2021

The impacts of increased remote work can be substantial and remote working has the potential to fundamentally change the nature of where, how, when, and why people work. This in turn will bring about economic, spatial, environmental, cultural, and societal change.

The Government is committed to facilitating increased remote work adoption in a way that reaps the many benefits and mitigates negative side-effects.

Government proposes to do this through removing barriers, developing infrastructure, providing guidance, raising awareness, and leading by example. The plan presents 3 Pillars for implementation.

#### **Pillar One: Create a Conducive Environment**

This includes proposals to legislate to provide employees the right to request remote work.

## 3 Policy Context

### Pillar Two: Develop and Leverage Remote Work Infrastructure

Measures include:

- Make a significant investment in remote work hubs and infrastructure in underserved areas to underpin the development of the national hubs network.
- How hub infrastructure aligns with the transition to the low carbon economy.
- Explore how the National Broadband Plan can be accelerated.

### Pillar Three: Build a Remote Work Policy and Guidance Framework

Measures Include:

- Mandate public sector employers, colleges, and other public bodies to move to 20 percent home and remote working in 2021.
- Promote remote work amongst businesses. This includes raising awareness of remote work training and advising on the skills interventions required for the successful adoption of remote work.

### 3.7 Enterprise Ireland's Strategic Priorities 2021

The Department of Enterprise, Trade and Employment is currently updating its strategy for SMEs. Enterprise Ireland's Strategic Priorities for 2021 highlight the direction of for enterprise Strategy. It highlights business will continue to require support to respond to COVID-19 and to adjust to the new EU-UK Trade and Cooperation Agreement. Additionally, Irish enterprise must respond to climate transition, and adapt to the changes driven by industry 4.0 and digitalisation.

In response, and aligned to the Government's National Economic Plan and forthcoming SME Growth Plan, Enterprise Ireland has developed the following strategic priorities for 2021:

- **Strengthen** Irish enterprise to respond to market shocks and disruption in response to COVID-19 and Brexit.
- Drive **transformational** change and the pace of innovation transitioning to new business models, digitalisation, and the low carbon economy.
- **Scale** and Grow the export and start-up base, across regions and sectors and grow companies of all sizes.

## 3 Policy Context

Action measures include:

- Maximise company survival through targeted financial and advisory measures, with a particular focus on liquidity, financial planning, and business continuity.
- Drive efficiency and enhance the productivity of client companies through existing and new financial and advisory supports (incl. Lean, Competitiveness, and Innovation funding).
- Help clients to adapt to the new EU-UK trading relationship, through financial supports, customs training, supply chain supports, regulatory guidance, foreign exchange and financial planning, direct client engagements, advisory clinics/events, targeted communications, and cross-Government coordination.

### 3.8 IDA - Driving Recovery & Sustainable Growth Strategy 2021-2024

IDA Ireland 2021-2024 strategy was prepared at a time of unprecedented uncertainty and accelerating change, with the Covid-19 economic shock continuing to reverberate with elevated levels of unemployment and lasting disruption in some sectors. The ambition of the strategy is to capitalise on opportunities and to provide the enterprise environment with solutions to the challenges they face in this difficult global environment. The ambition of the strategy is framed through five interlinked pillars of **Growth, Transformation, Regions, Sustainability and Impact**. These interlinked pillars align with and are guided by the UN Sustainable Development Goals (SDGs). At a national level they reflect the approach and ambition of the Programme for Government, which focuses on well-being and sustainability outcomes in parallel to economic prosperity. Crucially, the pillars also align with the outlook of IDA client companies, many of whom are already at the leading edge of different areas of sustainable growth ranging from skills development to climate action.

The impact of Covid-19 on the Irish economy was severe and immediate. The negative effects of the crisis may be long lasting, particularly in the labour market, with **unemployment forecast to average just under 16% in 2020 and to remain above 10% in 2021**. The unemployment challenge may be even more significant than these forecasts suggest amid the ongoing risk, and current reality, of heightened public health restrictions.

The strategy aims to deliver substantial job creation and economic activity and contribute significantly to a transformative recovery that embraces the future of work and the green transition aiming to strengthen the linkages between the larger

### 3 Policy Context

MNCs environment and the Irish SME sector (which accounts for 90% of all active enterprises in the country). A range of initiatives to respond to the emerging trends that are accelerating as a result of the pandemic, and identifies the opportunities for sustainable growth among IDA's established base of clients through a focus on transformative investments to increase the productivity of Irish operations and their workforce through RD&I, digitisation, training and actions on sustainability.

#### **Local Authorities**

Local Authorities have a very specific role in placemaking, the provision of infrastructure and services and in ensuring that their regions are seen as attractive to FDI. IDA's ability to maintain existing levels of FDI and to attract new investment is dependent upon Local Authorities successfully and consistently taking actions in a planning and development context to improve the liveability of Ireland's towns and cities. This includes interrelated policies to ensure critical population mass and density levels to support services and infrastructure; appropriate mix of housing solutions; access to multiple modes of transportation including public transport; walking and bike connectivity; and social and cultural amenities to support vibrant communities. Action in areas such as these is vital to ensure regions are attractive places to live, which is the fundamental bedrock to having the talent and skills base that can subsequently enable FDI attraction. Local authorities can act on placemaking to give Ireland's regions a competitive edge internationally, supporting smart-city technologies and ensuring Ireland is positioned as one of the best places in the world both to do business and to live. IDA will continue to work with Local Authorities in this regard. IDA Property Division will continue to seek and develop partnerships with key regional stakeholders including Local Authorities to ensure land, infrastructure and building permits are available in all regions.

#### **IDA Action on Linkages**

As recommended in the OECD report on FDI qualities in Ireland, IDA intends to work collaboratively with DETE, EI and across Government to support the development of domestic firms' capabilities, which is essential to fully maximise the impact of FDI in Ireland. To improve understanding of the nature of FDI-SME relationships in Ireland and to identify additional ways to strengthen the impact of FDI on productivity and innovation among SMEs, IDA is engaging with the OECD in their collaboration with the European Commission on the development of a Policy Toolkit to maximise FDI-SME diffusion channels.

### 3 Policy Context

It is important to emphasise that significant linkages and spill overs between MNCs and SMEs do exist today and are immensely beneficial to IDA clients, Irish enterprises and to communities across the country. As outlined in the Impact pillar, and in recognition of the different diffusion channels and enablers considered above, IDA will develop a number of initiatives to further strengthen these linkages and spill overs.

**Sourcing:** IDA will partner with client companies to identify opportunities for local sourcing to contribute towards efforts to enhance the resilience of their supply chains. Each of IDA's sectoral implementation plans will consider how to strengthen value chain linkages between IDA clients and SMEs, reflecting FDI characteristics and the variation in types of linkages and spill overs that exist between MNCs and SMEs across IDA's core sectors of focus. IDA will work closely with DETE and EI in the review of Global Sourcing, identify the potential for sustainable sourcing, and continue to involve EI supported companies in site visits and facilitate introductions between EI and IDA client companies.

**Innovation:** IDA clients consistently cite RD&I as the key area where they are trying to expand their mandate, while clients also cite RD&I collaboration among the types of interaction they have with the enterprise base in Ireland.<sup>48</sup> Within SMEs in Ireland there is a growing capacity to undertake RD&I and to gainfully participate in collaborative initiatives with MNCs. IDA's strategy will accelerate these joint collaborations.

**Clusters:** The identification and support of cluster development will contribute to each of the five pillars of IDA's strategy. Clusters can help create investment opportunities, enable transformation, advance regional development, promote sustainability and maximise the impact of FDI. Clusters provide a space for companies to discuss shared challenges and opportunities facing their industry, from innovative developments to evolving regulatory issues. IDA will develop a roadmap to establish formal clusters that bring together IDA clients and SMEs in a collaborative setting characterised by, and conducive to, knowledge and technology spill overs. The spatial and agglomeration effects arising from geographical proximity between MNCs and SMEs, particularly those with complementary capabilities, can enhance linkages and spill overs.

## 4 Baseline Assessment

### 4 Baseline Assessment

This section describes the baseline characteristics of Fingal County Council as they relate to socioeconomic elements (Section 4.1), current land use zonings for employment, industry and residential land supply as well as strategic infrastructure developments (Section 4.2) and enterprise and employment (Section 0).

#### 4.1 Socioeconomic profile of Fingal

##### 4.1.1 [Introduction](#)

This section describes the baseline characteristics of Fingal County Council where relevant to the economy, employment and land use. Within these core elements, the following indicators have been analysed; population, future population and labour force, housing, education, PC and internet connectivity, commuting and employment.

##### 4.1.2 [Population](#)

The population of Ireland was 4,761,865 in 2016 which represents 3.8% growth since 2011. Fingal is within the Eastern and Midland Regional Assembly which was the most populous region and fastest growing region in Ireland with growth of 5.4% over the intercensal period to a total of 2.3 million whilst Dublin had a total population of 1.35 million.

Fingal has displayed explosive growth over the past few decades, averaging 14.3% per intercensal period in growth from 1991 to 2016. Notably there was a period of large growth between 1996-2002 (17.1%) and 2002-2006 (22.2%). In absolute terms, Fingal has grown by +143,254 people over the 25 year period, more than 4 times that of Dun Laoghaire Rathdown (+32,608), more than twice as much as South Dublin (+70,028), and just under twice that of Dublin City (76,165). Over time this explosive growth rate has declined however remains the highest of any Dublin local authority and more than double the national growth rate (3.7%) at 8% from 2011-2016. The population of Fingal reach 296,020 people in 2016 and accounts for 22% of the Dublin population and is therefore the second most populous local authority after Dublin City.

## 4 Baseline Assessment

Table 4-1 Dublin Local Authorities Population 1991-2016

Area	Dublin City	Dún Laoghaire-Rathdown	Fingal	South Dublin	Dublin (All LAs)	State
1991	478,389	185,410	<b>152,766</b>	208,739	1,025,304	3,525,719
1996	481,854	189,999	<b>167,683</b>	218,728	1,058,264	3,626,087
2002	495,781	191,792	<b>196,413</b>	238,835	1,122,821	3,917,203
2006	506,211	194,038	<b>239,992</b>	246,935	1,187,176	4,239,848
2011	527,612	206,261	<b>273,991</b>	265,205	1,273,069	4,588,252
2016	554,554	218,018	<b>296,020</b>	278,767	1,347,359	4,757,976
Change 91-96	0.70%	2.50%	<b>9.80%</b>	4.80%	3.20%	2.80%
Change 96-02	2.90%	0.90%	<b>17.10%</b>	9.20%	6.10%	8.00%
Change 02-06	2.10%	1.20%	<b>22.20%</b>	3.40%	5.70%	8.20%
Change 06-11	4.20%	6.30%	<b>14.20%</b>	7.40%	7.20%	8.20%
Change 11-16	5.10%	5.70%	<b>8.00%</b>	5.10%	5.80%	3.70%
% of Dublin Population in LA	41.20%	16.20%	<b>22.00%</b>	20.70%	-	-

Fingal County Council is the youngest local authority in the State (at 33.8 years) which is 3.7 years lower than the State, 2.2 years lower than the region and 2.5 years lower than Dublin average. Across Fingal, the average male is 33.1 years old, which was slightly younger than the average female at 34.4 years as illustrated in Table 4-2.

## 4 Baseline Assessment

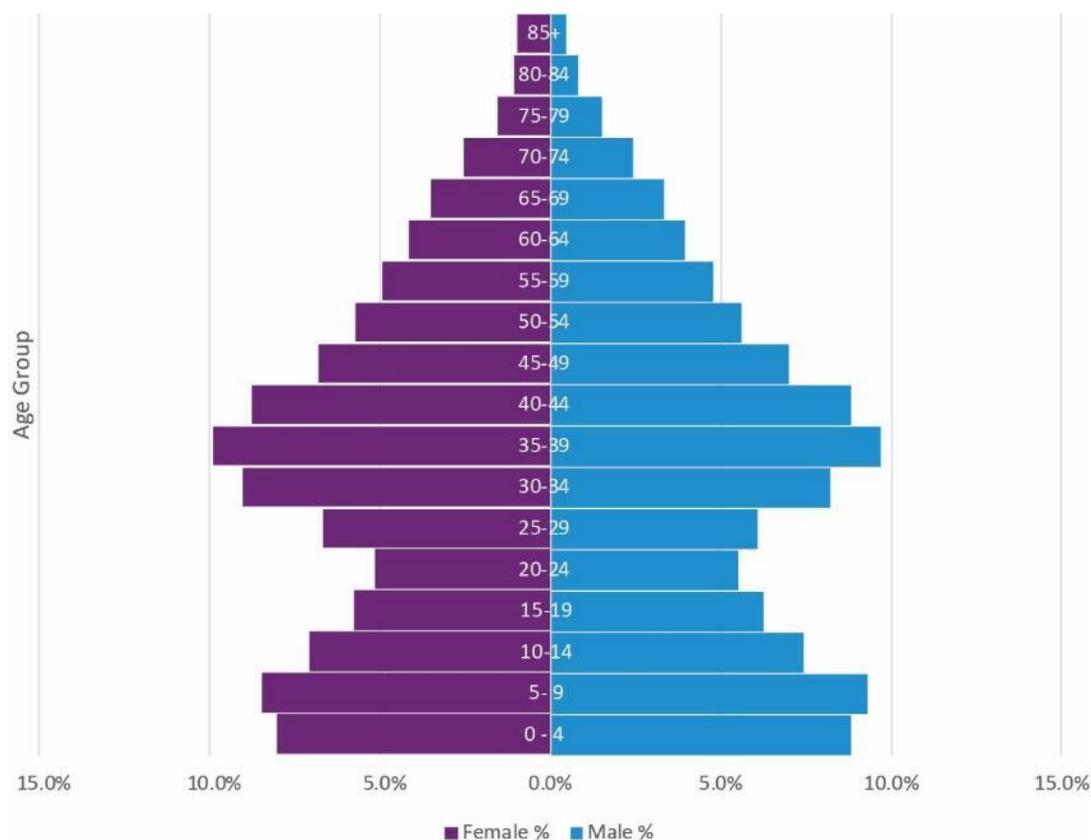


Figure 4-1: Population pyramid for Fingal (Source: CSO)

Table 4-2: Age and Cohort Structure for Fingal in 2016 (Source: CSO)

Age Structure	Fingal	Dublin	EMRA	State
Average Male	33.1 years	35.4 years	35.3 years	36.5 years
Average Female	34.4 years	37.1 years	36.6 years	38.3 years
Average Age	33.8 years	36.3 years	36.0 years	37.4 years
Cohort distribution and dependency in Fingal				
0-14		72,613		24.53%
15-64		196,372		66.34%
65+		27,035		9.13%
<b>Dependent Cohort</b>		<b>99,648</b>		<b>33.66%</b>

### 4.1.3 Future Population and Labour Force

Population projections have been analysed to support understanding of growth in employment in Fingal County Council and the GDA. The population projections are based on targets as established by the National Planning Framework (NPF) Implementation Roadmap to key years 2026 and 2031. The targets for Fingal are set out below in Table 4-3 alongside the neighbouring Local Authorities in Dublin.

## 4 Baseline Assessment

Table 4-3 NPF Implementation Roadmap population targets for the Dublin Local Authorities

County	2016	2026		2031	
	CSO	Lower	Upper	Lower	Upper
<i>Dublin</i>	1,347,500	1,489,000	1,517,500	1,549,500	1,590,000
Dublin City	554,500	613,000	625,000	638,500	655,000
Dun Laoghaire Rathdown	218,000	241,000	245,500	250,500	257,000
<b>Fingal</b>	<b>296,000</b>	<b>327,000</b>	<b>333,000</b>	<b>340,000</b>	<b>349,000</b>
South Dublin	279,000	308,000	314,000	320,500	329,000

The following analysis of future population has been interpolated from the 2016 private population (a minor reduction from total population) to the key years of 2026 and 2031 on the basis of the upper targets. This interpolation is linear and therefore the rate of change is constant from 2016-2026 and 2026-2031 as visualised in Figure 4-2. On this basis Fingal County Councils population is expected to grow at a rate of 4,001 persons per annum for 10 years until 2026 and at 3,200 persons per annum thereafter until 2031.

**NPF Interpolated Population Projections in Fingal County Council 2016-2031**

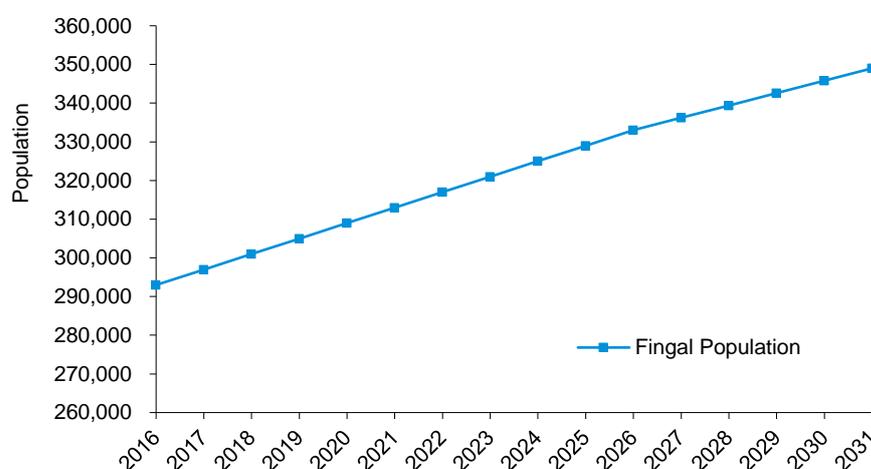


Figure 4-2 NPF Interpolated Population Projections in Fingal County Council 2016-2031

### Transitional Population Projections - MASP Local Authorities and Key Towns

Under NPO 68 under the National Planning Framework, through a Metropolitan Area Strategic Plan (MASP) Fingal can enable “up to 20% of the phased population growth targeted in the principal city and suburban area, to be accommodated in

## 4 Baseline Assessment

the wider metropolitan area<sup>9</sup>. This is subject to relocation of growth being compact development (infill or sustainable urban extension), the location must be serviced by high capacity public transport and a significant employment provision and meet requirements for growth identified in NPO 9. NPO 9 includes the metropolitan key towns of Bray, Maynooth and Swords which is of relevance to Fingal.

Under such a transitional population projection, up to 20% of the growth targeted in Dublin City and Suburbs (220,000 people) may be transferred to the facilitate compact growth in these key towns (up to 44,000). It should be noted that this settlement area of Dublin City and Suburbs is in all four Dublin LA's and the portion of which overlaps in Fingal is designated as the Consolidated Metropolitan Area. Under this scenario Swords may avail of an additional target of 20,000 persons up to 2031 (high scenario) bringing the population from 39,000 (2016 Census) to 59,000. Under such an adjusted scenario the total population in Fingal would rise to 333,000 by 2026 and 369,000 by 2031 (unadjusted target of 349,000).

### Labour Force Projection

Population targets within the NPF Implementation Roadmap for the key years of 2026 to 2031 have been reduced from population to labour force with reductions applied via CSO labour force participation rates by sex and age group<sup>10</sup>. The labour force in Fingal in 2016 numbered 133,971. This is estimated to increase to 167,000 in 2026 (+33,000 workers) and 176,000 in 2031 (+8,800 workers) marking a labour force proportion of 50.2% and 50.4% respectively. Over the plan period the labour force will increase from 153,788 in 2022 to 172,400 by 2029, representing an increase of **18,612 persons**, or 12.4%.

Year	2022	2023	2024	2025	2026	2027	2028	2029
<b>Working Population</b>	153,788	157,091	160,394	163,697	167,000	168,800	170,600	172,400

Figure 4-3 NPF Interpolated Working Population in Fingal County Council 2023-2029

<sup>9</sup> Transitional Population Projections in the Dublin Metropolitan Area Strategic Plan (MASP, July 10<sup>th</sup> 2020, Eastern and Midland Regional Assembly.

<sup>10</sup> Source: CSO Labour Force Assumptions Table 7.4 <https://www.cso.ie/en/releasesandpublications/ep/p-plfp/populationandlabourforceprojections2017-2051/labourforceassumptions/>. Prior to calculation the labour force was isolated from the total population using inverted student population rates for Dublin.

## 4 Baseline Assessment

While it is estimated that the labour force will continue to grow robustly in Fingal over the next decade, and over the plan period (2023-2029) by an additional 18,612 persons, it is not anticipated that this level of labour force growth would be fully catered for by local jobs. Given the relationship between the inflow and outflow of workers to Fingal, it is envisaged that only a proportion of new labour force would need to be accommodated within the county.

### Regional Employment Targets

The EMRA Regional Spatial and Economic Strategy have identified specific job targets which have been used in this study to estimate the number of new jobs Fingal should cater for over the plan period to align with wider regional policy requirements.

The RSES document for the EMRA region identified that there were 829,520 jobs in the region in 2016. Fingal's share of EMRA jobs in 2016 was 10.9% or 90,484 jobs. The NPF and RSES regional jobs target for the EMRA is an additional 320,000 jobs by 2040 at a rate of 13,333 jobs per annum over 24 years. This regional total has been localised using the relationship between the number of jobs in Fingal to those in the EMRA (10.9%) and assigned to the relevant years under the assumption that growth is linear. The descriptions, statistics and steps involved in this process are set out in Table 4-4 and identify an additional 1,454 jobs per annum in Fingal. By the end of the plan period in 2029, the estimated jobs target in the county will be 109,391 (an increase of 18,907 jobs from 2016 figure). Taking just the plan period between 2021-2029 there would be a target of producing **13,090 new jobs** in Fingal County.

Table 4-4 Localised Regional Job Targets in Fingal

Ref	Description	Statistic	Unit	Step
A	Eastern Midlands Regional Authority jobs (2016)	829,520	Jobs	
B	NPF / RSES - Additional Jobs by 2040 for EMRA	320,000	Jobs	
C	EMRA Annual Growth	13,333	Jobs	A/24
D	EMRA Total Jobs by 2031	1,029,520	Jobs	A+(C*15)
E	Fingal Jobs (2016)	90,484	Jobs	
F	Fingal's Jobs % share of EMRA Jobs (2016)	10.9%	Jobs	E/A
G	Fingal Additional Jobs per annum	1,454	Jobs	C*F
H	Projected total additional jobs for Fingal by 2029	18,907	Jobs	(C*13)*F
<b>I</b>	<b>Total Jobs in Fingal 2029</b>	<b>109,391</b>	<b>Jobs</b>	<b>E+H</b>

## 4 Baseline Assessment

### Forecasted Job Growth for Fingal County

Facilitating future job growth will be a key component of the Fingal Development Plan 2023-2029. Both the labour force growth, and the EMRA regional employment target methodologies provide insight into employment need in the county over the plan period. Both methods have been utilised in this study to establish an employment range, that will suitably cater for local populations, as well meeting regional policy targets. In this regard, it is envisaged that Fingal County will need to cater for between **13,090 (lower threshold) and 18,612 (upper threshold) new jobs/persons** over the plan period.

#### 4.1.4 [Housing](#)

##### 4.1.4.1 *Household Size*

The average household size in Fingal County Council is 3.03 persons per household which is the highest of the local authorities in Dublin. Further, the average household size in Fingal is significantly higher than the regional and state average (2.75 and 2.80 respectively). A breakdown of average household size in Fingal compared to other relevant areas is set out in Table 4-5.

Table 4-5: Private Average Household Size in Fingal (Source: CSO)

Location	Private Households	Persons in Private Households	Average Household Size
State	1,702,289	4,676,648	2.75
Eastern and Midlands Region	815,557	2,282,857	2.80
All of Dublin	479,683	1,308,854	2.73
Dublin City	211,747	525,299	2.48
Dun Laoghaire-Rathdown	78,601	213,468	2.72
South Dublin	92,523	277,168	3.00
<b>Fingal</b>	<b>96,812</b>	<b>292,989</b>	<b>3.03</b>

##### 4.1.4.2 *Persons per Household*

Specifically, the distribution of household size is more even in Fingal when compared to the State. Generally, Fingal has a much larger average household size given the proportion in households of at least two people. Just 15.8% of households in Fingal are single person households, which is less than Dublin, the region and the state (22.6%, 21.7% and 23.5% respectively). An overview of the population and number of households by size is provided in Table 4-6 with an illustrative comparison to the State set out in Figure 4-4.

## 4 Baseline Assessment

Table 4-6: Number of persons per private household in Fingal County Council (Source: CSO)

Size of household	Households	Persons
1 person	15,257	15,257
2 persons	26,072	52,144
3 persons	19,104	57,312
4 persons	20,842	83,368
5 persons	10,464	52,320
6 persons	3,692	22,152
7 persons	914	6,398
8 or more persons	467	4,038
<b>Total</b>	<b>96,812</b>	<b>292,989</b>

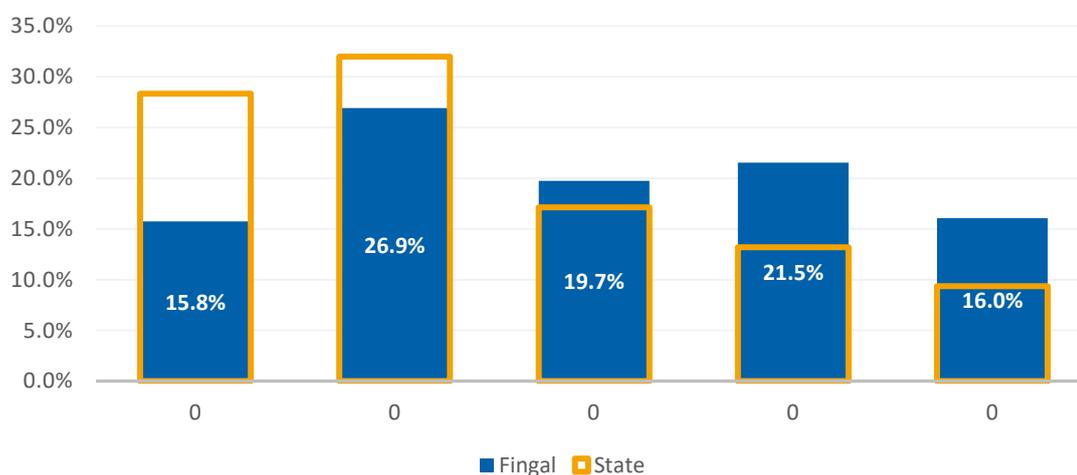


Figure 4-4: Proportion of households by size in Fingal and the State (Source: CSO)

### 4.1.4.3 House Type

The type of housing in Fingal is predominantly units associated with family living such as houses and bungalows which comprise 80.7% of all households. Of the remaining households 17.6% can be defined as apartment-living (i.e. flats, apartments and bed-sits<sup>11</sup>). The proportion of family unit types is lower than the State, (86.5%), higher than Dublin (73.1%) and generally comparable to the region (80.5%). Further detail on the proportion of private households by accommodation type is illustrated in Figure 4-5.

<sup>11</sup> It should be noted that it became illegal in 2013 for landlords to rent out bedsit-type accommodation over concerns that much of it was dilapidated, run-down and inadequate for modern habitation.

## 4 Baseline Assessment

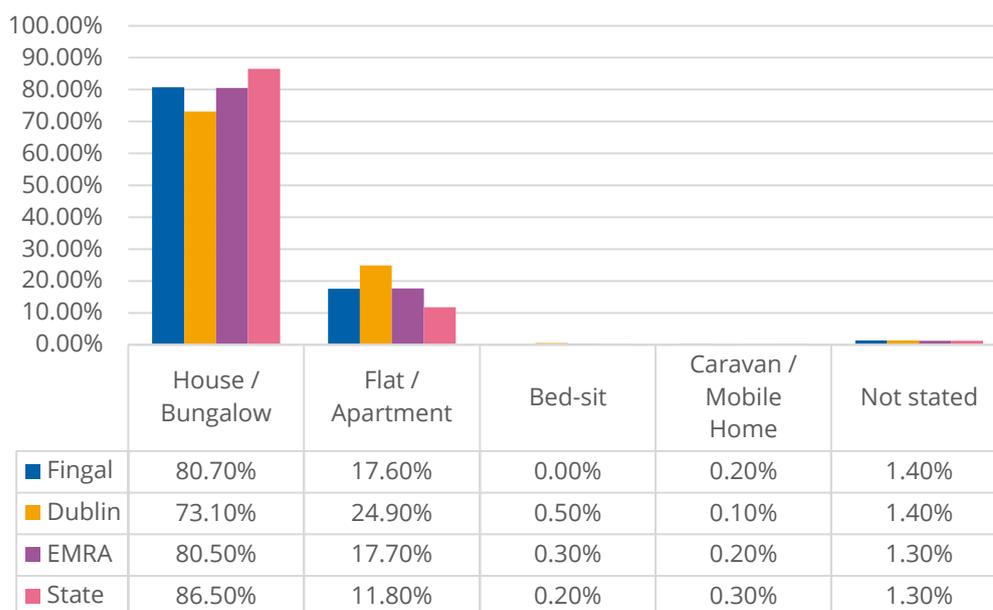


Figure 4-5: Private households (%) by type of accommodation (Source: CSO)

### 4.1.4.4 Tenure

The majority of households in Fingal are owner occupied (67.6%) comprising of those occupied with a mortgage and those without (45.6% and 21.1% respectively). The other dominant tenure type is rental. 21.3% of households rent from a private landlord, 5.9% rent from a local authority and 0.8% rent from a voluntary body. The remaining 4.4% of households are occupied free of rent or not stated. A breakdown of tenure is set out in Table 4-7.

Table 4-7: Housing tenure in Fingal (Source: CSO)

Type of occupancy	Classification	Households	Households %
Owner occupied with mortgage	Owner Occupied (All)	39,983	41.4%
Owner occupied no mortgage		25,364	26.3%
Rented from Private Landlord	Rented (Privately)	20,558	21.3%
Rented from Local Authority	Social Housing	5,697	5.9%
Rented from Voluntary Body		761	0.8%
Occupied free of rent	Other	781	0.8%
Not stated		3,463	3.6%
<b>Total</b>		<b>96,607</b>	<b>100.0%</b>

## 4 Baseline Assessment

### 4.1.5 Education

#### 4.1.5.1 Highest Level of Education Attainment

The population over 15 years of age in Fingal is well educated when compared to the national comparisons, generally aligned with the regional and slightly lower than Dublin as outlined in Table 4-8. Specifically, the proportion of the population above 15 years that has completed their second and third level education is much higher than the national and regional comparisons and the proportion of the population educated to primary level or less is relatively low in Fingal.

Table 4-8: Education (% persons) by Highest Level Achieved (Source: CSO)

Proportion	Number of persons in Fingal	Fingal	Dublin	EMRA	State
Third Level (Level 7)	22,716	12.6%	13.4%	12.0%	10.7%
Third Level (Level 6)	53,268	29.6%	24.7%	26.5%	27.3%
Up to Leaving Cert	56,037	31.1%	28.6%	31.2%	33.0%
Primary or Less	13,957	7.7%	10.6%	11.3%	12.5%
Masters or Higher	22,024	12.2%	14.7%	12.1%	10.1%

#### 4.1.5.2 Field of Study

The field of study for the population over 15 years of age in Fingal is illustrated in Figure 4-6 and generally aligns with Dublin, the region and the State. There is a slightly higher proportion education in social sciences, business, and law (19.6%) when compared to the region (17.5%) and State (14.7%), however this is slightly lower than the average for Dublin (20.1%). The same applies to science, mathematics and computing (6.1% in Fingal and Dublin, 5.3% in the region and 4.7% nationally) whilst the proportion that has not stated their field of study is relatively low in Fingal by comparison to other areas (43.9% in Fingal, 45.7% in Dublin, 47.7% in the region and 49.5% nationally).

## 4 Baseline Assessment

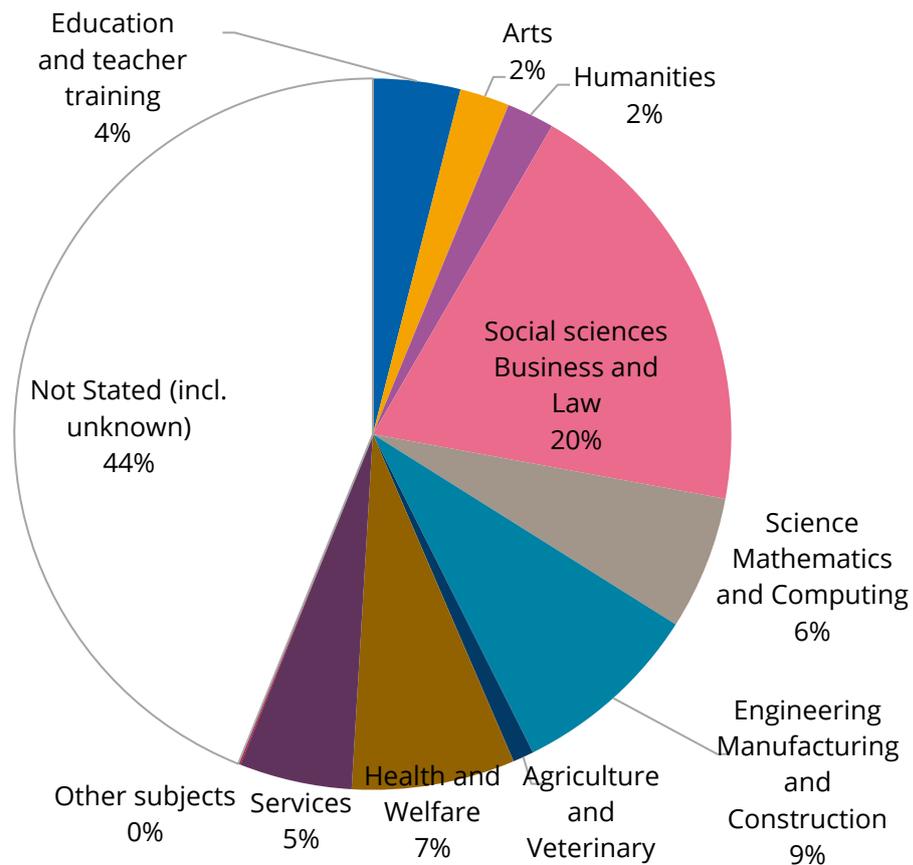


Figure 4-6: Field of Study (%) for the population over 15 years in Fingal (Source: CSO)

### 4.1.6 PC and Internet Connectivity

85% of the population in Fingal County Council have access to broadband according to the 2016 Census marking an 11.1% increase over the intercensal period. 7.9% have stated they have no access to broadband, down 37.5% over the same period. The remaining have defined their access as 'other' or not stated.

77.7% of households have a personal computer, down 4.4% over the intercensal period. 18.4% of the population do not have a personal computer.

The Department of the Environment, Climate and Communications provide an overview of national broadband rollout according to the national broadband plan<sup>12</sup>. Coverage for Dublin's 615,682 premises are predominantly covered by commercial operators (98% - 602,253) with the remaining 2% covered under national broadband plan intervention accounting for 13,429 premises. Broadband coverage is indicated in Figure 4-7. In the case of Fingal, the vast majority of

<sup>12</sup> <https://www.gov.ie/en/publication/5634d-national-broadband-plan-map/>

## 4 Baseline Assessment

existing businesses and residences are within the 'commercial areas' (Blue) and have access to high quality broadband infrastructure.

There are many SIRO gigabit hubs in Fingal County Council or Dublin city which provide fibre network broadband for both businesses and households at the following locations: Balbriggan, Baldoyle, Blanchardstown, Clonshaugh, Coolock, Finglas, Santry, Donaghmede, Ongar, Howth, Swords, Tyrellstown.

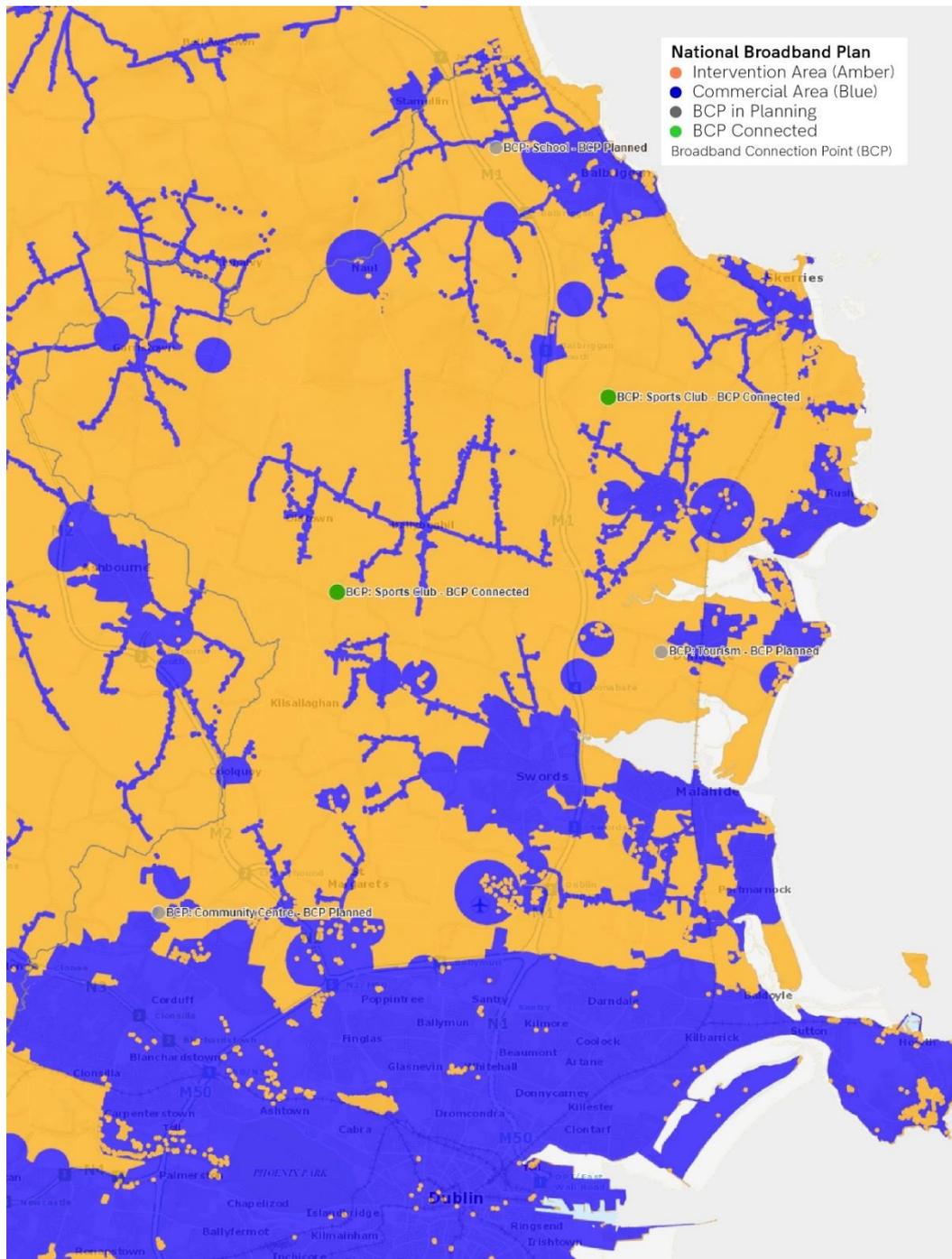


Figure 4-7 Department of Environment, Climate and Communications Broadband Map

## 4 Baseline Assessment

### 4.1.7 Commuting

The average journey time to work, school or college for those in Fingal is 32.4 minutes which is slightly higher than the Dublin, regional and national comparisons (30.8 minutes, 30.5 minutes, and 27.4 minutes respectively). This can be associated with the fact that almost 25,000 people (or 12.5% of the population) spend over an hour commuting.

The means of travel for those commuting to education or employment is illustrated in Figure 4-8. Generally private car, public and active transport are the most popular modes with spatial differences along with differences between employees and students.

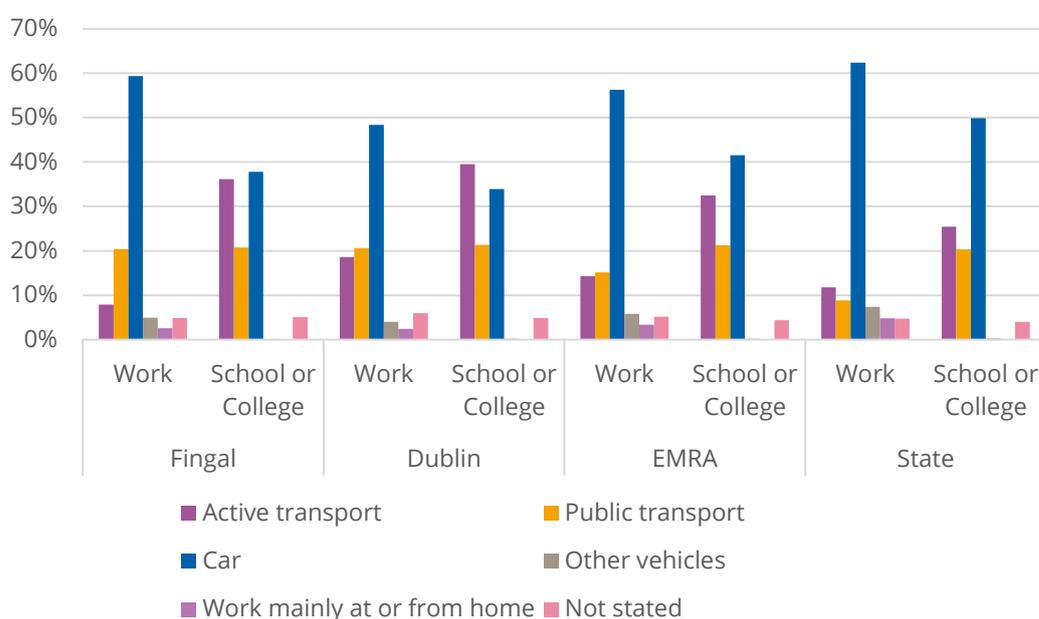


Figure 4-8: Means of travel (% population over 5 years) to education work, school or college (Source: CSO)

The proportion of students using active and public transport is relatively high (36.1% and 20.8%) and comparable to Dublin (39.5% and 21.4% respectively), most likely given proximity to schools and accessibility of the network in Fingal and Dublin more generally. This is particularly evident when compared to the region (32.5% and 21.3% respectively) and national comparisons (25.4% and 20.3% respectively). This results in a smaller reliance on private vehicles in Fingal when compared to the region and State (37.8%, 41.6% and 49.9% respectively).

For employees travelling to work in Fingal, private car is the dominant mode (59.4%) and it is higher than Dublin and the region (48.4% and 56.3%), but lower than the national comparison (62.4%). Public transport is also well used by

## 4 Baseline Assessment

employees in Fingal travelling to work (20.4%) which compares well with Dublin (20.6%) and is significantly higher than the regional and national comparisons (15.1% and 8.9%).

Car ownership in Fingal increased from 2011 – 2016. 1,707 (or 2.2%) fewer households had no cars which equated to just 10% of households in 2016. This is significantly lower than Dublin, the region and State (21.4%, 17.2% and 15.2% respectively) and overall the proportion of those households with one car and with two or more cars is higher than other areas as illustrated in Table 4-9.

Table 4-9: Car ownership in households (Source: CSO)

Cars per household	Fingal	Dublin	EMRA	State
No cars	10.0%	21.4%	17.2%	15.2%
One car	43.7%	42.1%	41.2%	41.0%
Two more cars	42.8%	32.3%	38.1%	40.8%

## 4 Baseline Assessment

### 4.1.8 Employment

#### 4.1.8.1 Industries

An overview of the persons at work by industry is provided in Figure 4-9. Overall, the proportional splits are relatively comparable to the national, regional and Dublin breakdown with dominance of commerce and trade and professional services.

Some notable distinctions include a slightly higher proportion working in transport and communications (potentially related to the presence of Dublin Airport and various IT companies in the area), public administration (potentially due to the presence of public bodies in Fingal and more generally in Dublin) along with a relatively higher proportion in agriculture, forestry and fishing when compared to Dublin (likely due to the extensive and historic industries in north county).

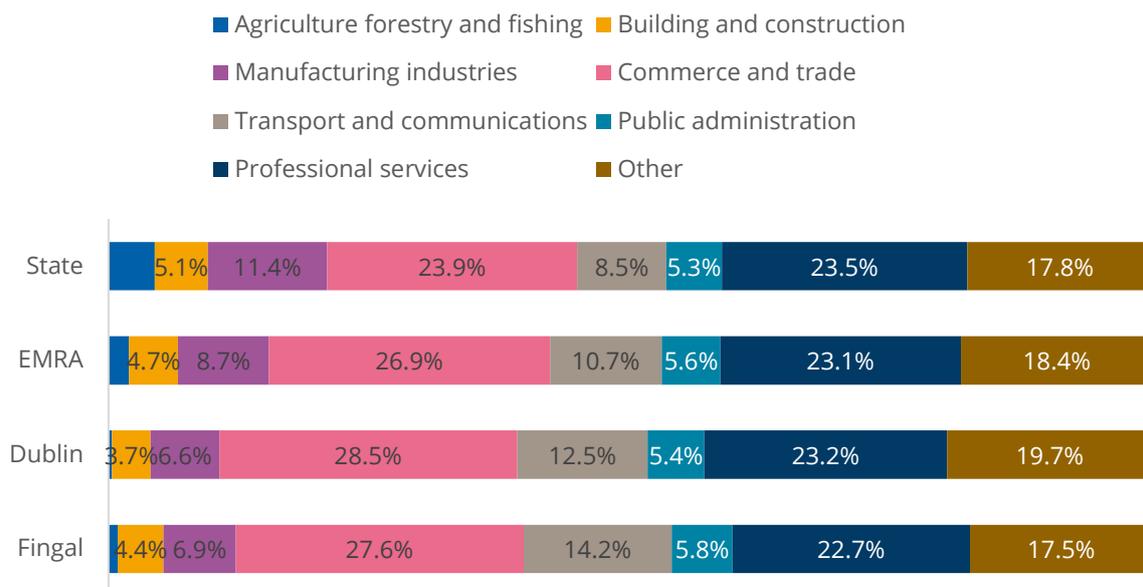


Figure 4-9: Persons at work (%) by industry (Source: CSO)

## 4 Baseline Assessment

The largest employment sectors in Fingal for residents are commerce and trade (27.6%), professional services (22.7%) and transport and communications (14.2%) as set out in Table 4-10.

Table 4-10 Resident Population by Industry of Employment 2016 (Source: CSO)

Industry	Male	Female	Total	Total %
Agriculture forestry and fishing	938	255	1,193	0.9%
Building and construction	5,379	487	5,866	4.4%
Manufacturing industries	6,353	2,917	9,270	6.9%
Commerce and trade	19,393	17,542	36,935	27.6%
Transport and communications	13,417	5,581	18,998	14.2%
Public administration	4,119	3,702	7,821	5.8%
Professional services	9,274	21,154	30,428	22.7%
Other	12,289	11,171	23,460	17.5%
Total	71,162	62,809	133,971	100.0%

### 4.1.8.2 Social Class

An overview of the social class of the population in Fingal, Dublin, the region and State is illustrated in Table 4-11. Generally managerial and technical, non-manual and skilled manual are the most dominant social classes which is consistent across all areas. However, the proportion of managerial and technical along with non-manual is higher in Fingal than Dublin, the region and State whilst the proportion of semi-skilled and unskilled is lower. This may be associated with relatively high levels of education which are further described in Section 4.1.5 and it is also generally indicative of affluence which is discussed in further detail in Section 4.1.8.3.

Table 4-11 Social class of the population (Source: CSO)

	Fingal	Dublin	EMRA	State
Professional workers	8.94%	10.08%	8.90%	8.12%
Managerial and technical	32.88%	30.44%	29.75%	28.08%
Non-manual	18.46%	17.36%	17.58%	17.58%
Skilled manual	12.87%	11.82%	13.23%	14.11%
Semi-skilled	8.52%	8.33%	9.31%	10.52%
Unskilled	2.80%	3.07%	3.34%	3.58%
All others gainfully occupied and unknown	15.55%	18.92%	17.89%	18.01%

## 4 Baseline Assessment

### *4.1.8.3 Affluence and Deprivation*

The POBAL Index provides a method of measuring the relative affluence or disadvantage of a particular geographical area using data compiled from various censuses. It is a recognised resource for identifying affluence and disadvantage, by providing local analysis of relevant metrics (i.e. the proportion of skilled professionals, education levels, employment levels, and single-parent households found in an area).

Within Fingal affluence is generally evident across most of the county with particular pockets (i.e. very affluent areas) evident around Castleknock, north Lucan, Malahide, to the south of Swords and Kinsealy (i.e. Airport and Balgriffin). In contrast pockets of Blanchardstown, Kilsallaghan and Balbriggan are considered to be below average and disadvantaged in the case of Blanchardstown-Corduff as illustrated in Figure 4-10.

## 4 Baseline Assessment

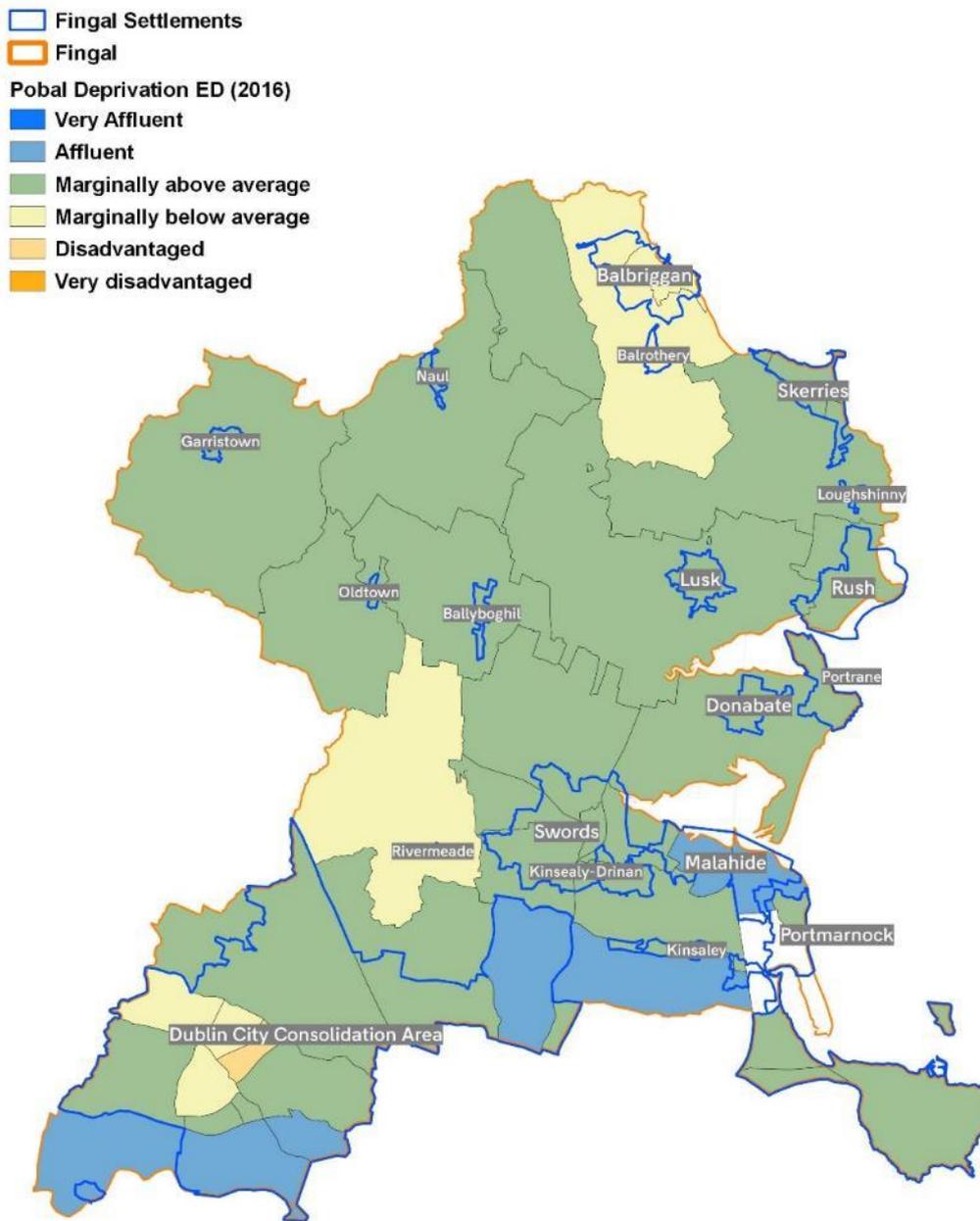


Figure 4-10: POBAL Index and relevant affluence/deprivation per Electoral Division in Fingal (Source: POBAL, 2017)

## 4 Baseline Assessment

### 4.1.8.4 Unemployment

Approximately 6.9% of the population over 15 years in Fingal (or 15,415 people) was unemployed in April 2016 and this was generally lower than Dublin, the region and State. Of those unemployed, 0.8% were looking for their first job whilst 6.1% were unemployed having given up or lost their previous job. It should be noted that gender disparity was evident in terms of unemployment in that 7.4% of males were unemployed in comparison to 6.5% of females.

Since then, unemployment has generally decreased in line with the regional and national trends as illustrated by the monthly live register data<sup>13</sup> per social welfare office in Figure 4-11. It should be noted that there is no historic data for Swords social welfare office prior to 2009. The total number of claimants has declined by 51% from 2010 to 2020 (111,373 claimants). The greatest decrease was observed in Blanchardstown (53.9%) and Balbriggan (53.5%). Overall unemployment has reduced dramatically and had been on a downward trend until the 2020 COVID-19 pandemic. Where every social welfare office in Fingal had recorded consistent unemployment decline quarterly for 7 years from 2012 to 2019, in all cases unemployment grew by an average of 11.8% in 2020. Notably unemployment grew by just 3% in Blanchardstown, significantly below the average noted in Balbriggan and Swords.

The limited data available for 2021 (M1 and M2) indicates that unemployment is up 23.0% in comparison with the same period in 2020, and up 14.0% in comparison with the same period in 2019 noting that both were not impacted by restrictions. It should be noted that there was some overlap between those who met the criteria to be included on the Live Register and those who benefited from either of the two COVID-19 income support schemes during 2020 and this is discussed in further detail in Section 6.1.

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<sup>13</sup> This relates to all persons under 65 years of age who are claiming Jobseekers Benefit, Jobseekers Allowance and Other registrants.

## 4 Baseline Assessment

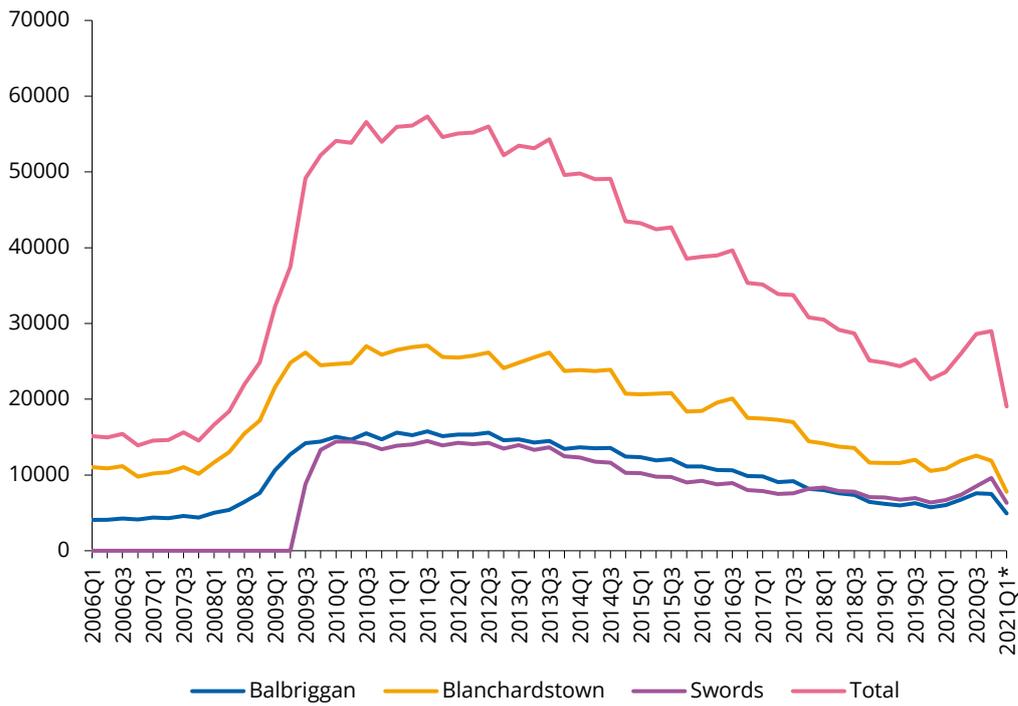


Figure 4-11: Live Register Data for offices within Fingal 2016 – 2021 \*M1-M2) (Source: CSO)

## 4 Baseline Assessment

### 4.2 Zoning and Land Use in Fingal

#### 4.2.1 [Fingal land use and zoning](#)

To grow the local economy in Fingal through FDI, indigenous investment or natural growth, there is a requirement for sustainable allocation and development of quality, fit-for-purpose land with adequate infrastructure. Through identification of current zoning in terms of area provided for specific industry use types, an assessment review of zoned lands can be conducted to determine developed lands and undeveloped opportunities.

The intention of such analysis is to quantify the current provision of appropriate lands, to quantify the amount of such lands at the outset of the plan, and therefore to determine demand and the supply of land capacity for economic development.

There are 23 zoning classifications identified in the Fingal County Council Development Plan 2017-2023. These account for 45,787 hectares of land as set out in Table 4-12.

Table 4-12 Fingal Development Plan zoning classification 2017-2023

Zoning	No. Zoned Areas	Area (Ha)	% of Area
CI - Community Infrastructure	118	330.07	0.7%
DA - Dublin Airport	26	1,024.70	2.2%
FP - Food Park	4	192.43	0.4%
GB - Green Belt	90	6,154.54	13.4%
GE - General Employment	101	1,850.73	4.0%
HA - High Amenity	172	7,184.35	15.7%
HI - Heavy Industry	1	293.52	0.6%
HT - High Technology	36	685.09	1.5%
LC - Local Centre	66	50.96	0.1%
MC - Major Town Centre	58	125.05	0.3%
ME - Metro Economic Corridor	24	390.12	0.9%
OS - Open Space	1816	2,770.40	6.1%
RA - Residential Area	74	903.22	2.0%
RB - Rural Business	13	92.34	0.2%
RC - Rural Cluster	76	171.94	0.4%
RD - Road	35	2,312.00	5.0%
RL - Rail	47	85.36	0.2%
RS - Residential	2144	2,914.19	6.4%
RU - Rural	177	17,662.93	38.6%
RV - Rural Village	70	369.22	0.8%
RW - Retail Warehousing	4	30.13	0.1%

## 4 Baseline Assessment

Zoning	No. Zoned Areas	Area (Ha)	% of Area
TC - Town and District Centre	141	175.45	0.4%
WD - Warehousing and Distribution	2	18.28	0.0%
Grand Total	5295	45,787.02	100.0%

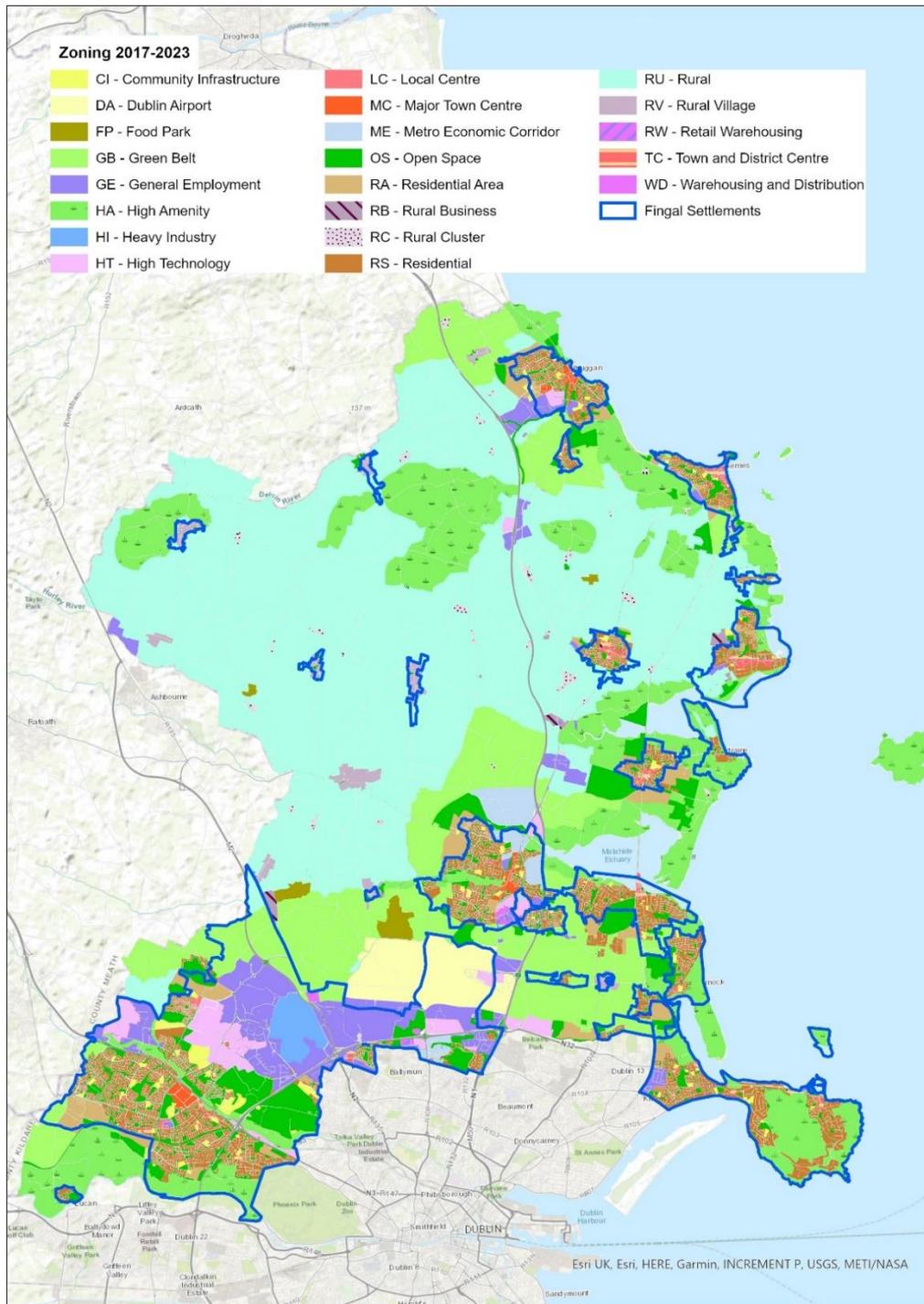


Figure 4-12 Fingal Zoning 2017-2023

## 4 Baseline Assessment

### 4.2.2 Enterprise land use zonings

The following zoning classifications are considered being related to enterprise and uses relating to employment:

- DA - Dublin Airport
- FP - Food Park
- GE - General Employment
- HI - Heavy Industry
- HT - High Technology
- ME - Metro Economic Corridor
- RB - Rural Business
- RW - Retail Warehousing
- WD - Warehousing and Distribution

In total there are 4,574 hectares of lands identified and zoned for industry and employment of which 1,502 hectares have been developed as of Q2 2020. There are 3,072 hectares of remaining zoned lands for such classification. The quantum of developed and undeveloped land per classification is set out in Table 4-13 and the objectives and descriptions of each type has been set out in Table 4-14.

Notably there has been considerable development of retail warehousing and high technology zoned lands with 78.5% and 48.7% being developed in the county as of Q2 2020. In the case of retail warehousing there are just 6 remaining hectares of zoned land capacity.

Table 4-13 Fingal employment zoning classifications

Zoning	Hectares (Industrial Lands)	Undeveloped Q2 2020 (Ha)	Developed Q2 2020 (Ha)	Proportion of Zoned Land Used
DA - Dublin Airport	1,024	840	184	18.0%
FP - Food Park	192	127	65	33.7%
GE - General Employment	1,850	1,170	680	36.8%
HI - Heavy Industry	293	216	77	26.2%
HT - High Technology	685	351	334	48.7%
ME - Metro Economic Corridor	390	281	109	27.9%
RB - Rural Business	92	63	29	31.9%
RW - Retail Warehousing	30	6	24	78.5%
WD - Warehousing and Distribution	18	17	1	3.7%
<b>Total</b>	<b>4,574</b>	<b>3,072</b>	<b>1,502</b>	<b>32.8%</b>

## 4 Baseline Assessment

Table 4-14 Fingal zoning classification and descriptions

Zoning	Description
DA - Dublin Airport	Ensure the efficient and effective operation and development of the airport in Accordance with an approved Local Area Plan
FP - Food Park	Provide for and facilitate the development of a Food Industry Park
GE - General Employment	Provide opportunities for general enterprise and employment
HI - Heavy Industry	Provide for heavy industry
HT - High Technology	Provide for office, research and development and high technology/high technology manufacturing type employment in a high quality built and landscaped environment
ME - Metro Economic Corridor	Facilitate opportunities for high-density mixed-use employment generating activity and commercial development, and support the provision of an appropriate quantum of residential development within the Metro Economic Corridor
RB - Rural Business	Provide for and facilitate rural-related business which has a demonstrated need for a rural location
RW - Retail Warehousing	Provide for retail warehousing development
WD - Warehousing and Distribution	Provide for distribution, warehouse, storage and logistics facilities which require good access to a major road network within a good quality environment

### 4.2.2.1 Land use zoning location analysis

The quantum of available industrial lands has been associated with major development areas to understand distribution of land availability. Of the 4,574 hectares of zoned industrial land in Fingal, 44.1% is allocated to Dublin Airport and the South Fringe. A further 33% is allocated to Blanchardstown and 10.3% to Swords. The largest amount of undeveloped land is in the Dublin Airport/South Fringe area with 1,503 hectares available for development. The proportion of developed and undeveloped land per zoning classification in each location is outlined in Table 4-15 through Table 4-17.

## 4 Baseline Assessment

Table 4-15 Quantum of developed and undeveloped industrial land by location (Q2 2020) – 1 of 3

Location Classification	Blanchardstown		Swords		Dublin Airport / South Fringe		Balbriggan	
	Dev.	Undev.	Dev.	Undev.	Dev.	Undev.	Dev.	Undev.
DA - Dublin Airport	0	0	0	0	184	840	0	0
FP - Food Park	0	0	0	0	48	66	0	0
GE - General Employment	323	490	35	10	198	429	27	93
HI - Heavy Industry	77	216	0	0	0	0	0	0
HT - High Technology	257	146	18	51	47	123	12	14
ME - Metro Economic Corridor	0	0	80	255	27	28	0	0
RB - Rural Business	0	0	0	0	0	0	1.6	0
RW - Retail Warehousing	0	0	14	7	9	0	0	0
WD - Warehousing and Distribution	0	0	0	0	1	17	0	0
<b>Totals</b>	<b>657</b>	<b>852</b>	<b>147</b>	<b>323</b>	<b>514</b>	<b>1,503</b>	<b>41</b>	<b>107</b>

Table 4-16 Quantum of developed and undeveloped industrial land by location (Q2 2020) – 2 of 3

Location Classification	Courtclough		Baldoye		Malahide / Portmarnock		Skerries	
	Dev.	Undev.	Dev.	Undev.	Dev.	Undev.	Dev.	Undev.
DA - Dublin Airport	0	0	0	0	0	0	0	0
FP - Food Park	0	0	0	0	0	0	0	0
GE - General Employment	15	38	42	0.3	0	0	0	11
HI - Heavy Industry	0	0	0	0	0	0	0	0
HT - High Technology	0	17	0	0	0	0	0	0
ME - Metro Economic Corridor	0	0	0	0	0	0	0	0
RB - Rural Business	0	0	0	0	0	0	0	0
RW - Retail Warehousing	0	0	0	0	0	0	0	0
WD - Warehousing and Distribution	0	0	0	0	0	0	0	0
<b>Totals</b>	<b>15</b>	<b>55</b>	<b>42</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>11</b>

## 4 Baseline Assessment

Table 4-17 Quantum of developed and undeveloped industrial land by location (Q2 2020) – 3 of 3

Location Classification	Donabate / Turvey		Rush		Lusk		Fingal Central	
	Dev.	Undev.	Dev.	Undev.	Dev.	Undev.	Dev.	Undev.
DA - Dublin Airport	0	0	0	0	0	0	0	0
FP - Food Park	0	0	0	0	0	0	17	61
GE - General Employment	34	39	4	4	1	5	3	49
HI - Heavy Industry	0	0	0	0	0	0	0	0
HT - High Technology	0	0	0	0	0	0	0	0
ME - Metro Economic Corridor	0	0	0	0	0	0	0	0
RB - Rural Business	0	0	12	19	1	0	14	44
RW - Retail Warehousing	0	0	0	0	0	0	0	0
WD - Warehousing and Distribution	0	0	0	0	0	0	0	0
<b>Totals</b>	<b>34</b>	<b>39</b>	<b>16</b>	<b>23</b>	<b>2</b>	<b>5</b>	<b>34</b>	<b>154</b>

## 4 Baseline Assessment

### 4.2.2.2 Land use zoning demand

The following analysis of demand is based on settlement-specific zoning for the following areas: Blanchardstown, Swords, Dublin Airport and South Fringe, Balbriggan, Malahide and Portmarnock and Fingal Central. The zoning in the remaining areas as well as those analysed below have been mapped and are included in Appendix A.

#### **Blanchardstown:**

Lands zoned in Blanchardstown account for 33.0% of zoned industrial land in Fingal County Council equating to 1,509 hectares of land. Under half (43.5%) of these lands have been developed with 852 hectares remaining. Zoning in Blanchardstown is primarily general industry, heavy industry and high technology. Blanchardstown has the most developed employment related zoned land.

A majority of designated lands for high technology are already developed (257 hectares accounting for 64% of land) with just 146 hectares remaining. The majority of land zoned general and heavy industry is undeveloped with 490 hectares and 216 hectares available for development respectively.

A large majority of these designated lands are located to the North of Blanchardstown in the Dublin Enterprise Zone situated between the N2, N3 and M50 roads. The remaining undeveloped lands for heavy industry are located to the east of the DEZ at the intersection of the N2 and M50 roads. High technology zoned lands are split into two primary sectors; the majority are located within Rosemount Business Park, IDA Ballycoolin Business Park and Blanchardstown Corporate park with the remaining lands further west in Damastown Industrial Park. Sites in Damastown Industrial Park and the western portion of the DEZ zoned for high technology are earmarked for data centre development.

#### **Swords:**

Enterprise zoned lands in Swords account for 10.3% of the total lands in Fingal County Council with 470 hectares allocated to employment related activity. A majority (68.7%) of lands are undeveloped equating 323 hectares. There are 147 hectares of existing developed lands for industry. Industrial zoning classification in Swords is more varied with classifications in general industry, high technology, Metro Economic Corridor (MEC) and retail warehousing.

The vast majority of lands are zoned MEC (71.3%) followed by high technology (14.7%), general employment (9.6%) and retail warehousing (4.5%). A majority of

## 4 Baseline Assessment

lands zoned for high technology and MEC are undeveloped in comparison to the other zoning classes, with 73.9% and 76.1% undeveloped respectively.

The lands zoned MEC have a function and purpose defined as follows: “Facilitate opportunities for high density mixed use employment generating activity and commercial development, and support the provision of an appropriate quantum of residential development within the Metro Economic Corridor” and can be likened to general employment with a spatial mix with residential lands.

There are just under 10 hectares of MEC zoned lands in the south of Swords beside Airside business park. Further northeast of which there are an estimated 50 hectares of MEC land in North Dublin Corporate Park and Swords Business Park. The remaining majority are located in the North of Swords at Balheary and Swords Enterprise Campus (primarily undeveloped).

High technology lands are split into two sites, a 26.5 hectare section of land in Lisenhall Demesne between the M1 and R132 roads, and a 42 hectare section in Airside Business Park to the south.

General employment lands are distributed to the south east and the 21 hectares of retail warehousing are located in the southmost areas of Airside Retail Park and Enterprise Centre alongside the R132.

### **Dublin Airport and South Fringe:**

Dublin Airport and the South Fringe account for the largest proportion of zoned industrial lands in Fingal County Council with 2,017 hectares of land identified for industry, employment and enterprise. This accounts for 44.1% of all lands zoned for industry and employment in Fingal. Similar to Swords, zoning classifications in this region are varied with just heavy industry and rural business not zoned for. The primary classifications in order of proportion are Dublin Airport (50.8%), general employment (31.1%), high technology (8.4%) and food park (5.7%) with the remaining distributed between MEC, retail warehousing and warehousing and distribution.

There is a large amount of undeveloped lands across each categorisation ranging from 82% undeveloped land classified as Dublin Airport (840 hectares) to 50.9% of MEC land undeveloped (28 hectares).

Naturally this area is focussed on Dublin Airport which contains the vast majority of lands to the north of M50 and west of the M1. The southern fringe areas are predominantly general employment along the edge of the airport from Collinstown Business Park in the east through Ballymun to Dublin Airport Logistics

## 4 Baseline Assessment

Park and the N2 in the west. South of the M50 there are mixed zoning classifications with general employment lands comprising Airways Industrial Estate, Santry and Woodford Business Parks, and Furry Park Industrial Estate. There is a 4 hectare high technology site collocated beside the industrial parks with the remaining high technology lands between the M50 and Dublin Airport (55 hectares) and in isolation to the east of the M1 motorway, north of Clonshaugh (70 hectares). The vast majority of these lands are undeveloped (72.4%). There is a further pocket of MEC zoned lands to the south of Ballymun Cross at Gulliver's Retail park and Compass Distribution Park which is roughly 50% developed. To the west of Ballymun Cross are mixed classifications with retail and distribution (9 hectares), high technology (9.4 hectares) and warehousing and distribution (4.7 hectares).

### **Balbriggan:**

Lands zoned in Balbriggan account for 3.2% of zoned industrial land in Fingal County Council or 148 hectares of land. The majority (72.5%) of these lands remain undeveloped with 107 hectares remaining. Zoning in Balbriggan is primarily general industry (81.3%), high technology (17.6%) and rural business (1.7%).

The greatest source of undeveloped lands for employment and industry are the 77.5% of general industry classified lands. These areas are isolated to a single dominant tract of land from Stephenstown Industrial estate near the town centre to Clonard Cross and the M1 in the west. There is a 11.4 hectare general employment zoned site to the east of R132 which is fully developed. These general employment lands sites are less developed as the distance from the town centre increases. Further, there is a single rural business site to the south (1.6 hectares) for agricultural or horticultural sectors.

### **Malahide and Portmarnock:**

Notably, there are no lands zoned for enterprise or employment in Malahide nor Portmarnock, in both cases the towns are predominantly residentially classified with a majority of employment related zoning defined as town and district centre in the centre of Malahide near the marina.

### **Rush:**

Rush, similar to Malahide and Portmarnock has most of its central area zoned as town and district centre which caters for mixed uses. There is limited enterprise and employment classified lands with just 39 hectares accounting for under 1% of the total lands in Fingal County Council. These lands are mainly zoned for rural business (79.5%) and general employment (20.5%).

## 4 Baseline Assessment

There is a single site zoned for general employment which is 50% developed leaving just 4 hectares remaining. The site is located to the west at the junction at Whitestown Road and the Old Road leading to the R128. There are two concentrations of rural business land classifications: 3.85 hectares to the south at south Shore Road, and 27.8 hectares to the north of the town surrounding Knightsgate Sea Brook and Brook lane. 61.3% of these rural business lands are undeveloped leaving 19 hectares of land capacity.

### **Lusk:**

There are just 7 hectares of land zoned for enterprise and employment related activities in Lusk, accounting for less than 1% of lands in Fingal. These lands are mainly zoned for rural business (14.3%) and general employment (85.7%). The rural business lands are fully developed leaving just 5 hectares of undeveloped general employment lands remaining. This land is on a single site to the west of the town near the R132.

### **Fingal Central:**

Enterprise zoned lands in central Fingal account for 4.1% of the total lands in Fingal County Council with 188 hectares allocated to employment related activity. The vast majority (81.9%) of lands are undeveloped equating to 154 hectares given that these lands are more rurally located. There are 34 hectares of existing developed lands for industry. These lands are classified as food park (41.5%), rural business (30.9%) and general employment (27.7%). Most of the general employment lands are undeveloped (94.2%) leaving 52 hectares remaining in future capacity. There is 61 hectares of land capacity for future food park development and 44 hectares for rural business.

There are sites classified for food park development in the Ward Cross with 52 hectares. A majority of this land is undeveloped. This site is collocated with a rural business site 31.8 hectares in size which is undeveloped. There is a further 13 hectare food park site further north near the county boundary just east of Ashbourne however this is fully developed. The remaining general employment lands are located by the R132 and M1 intersection beyond Swords near Donabate.

### **Skerries:**

There are 11 hectares of entirely undeveloped land zoned for general employment in Skerries accounting for 1.7% of the county total. This zoned land is in a single bank to the south west town hinterland across the railway line with access from the R127 to the south.

## 4 Baseline Assessment

### Other areas:

There are further minor areas classified for enterprise and employment at the following locations: Donabate, Turvey, Baldoyle and Courtlough. In the case of Baldoyle there is just 0.3 hectares of general employment land available for development. The remaining zoned lands of these other areas comprise 1.6% of the county total and are primarily general industry with the exception of 17 hectares zoned for high technology in Courtlough, this site is located opposite the M1 business park.

### Remaining Capacity:

To date, 32.8% of employment and enterprise zoned lands have been developed (1,502 hectares) in the county. There is significant variation in the rate of development on the basis of specific classification with high development rates in retail warehousing (78.5%) and high technology (48.7%) in contrast to the slower development of warehousing and distribution (3.7%). As of Q2 2020 there is little remaining employment land capacity in several settlements including:

- No remaining zoned lands in Malahide and Portmarnock
- 0.3 hectares of undeveloped general employment land in Baldoyle
- 5 hectares of general employment land in Lusk
- 11 hectares of general employment land in Skerries

There is considerable remaining capacity in the remaining settlements and employment areas.

### Future Requirement: Enterprise and Employment Land Capacity

As set out in Section 4.1.3 and repeated in Table 4- and Table 4-19, the study uses two methodological approaches to establish a forecasted job range in Fingal by 2029. Through application of a current average density (additional jobs from 2016-2020 over the quantum of lands developed since they were zoned) an estimation of future land requirements to meet the jobs target in Fingal has been calculated below for each of the two scenarios.

An analysis of land use capacity and existing employment on zoned lands indicates a current average density of 64.1 jobs per hectare across Fingal. Assuming a similar density equivalent is maintained into the future, it is estimated that between **204 hectares and 290 hectares** of land will be required by 2029 to

## 4 Baseline Assessment

facilitate new employment and enterprise growth. This growth has been derived from the 13,090 or 18,612 additional target jobs required between 2021 to 2029, divided by the current estimated average density of 64.1 jobs per hectare. The relevant descriptions, statistics and methodological steps have been set out in the table below:

Table 4-18 Scenario 1: CSO Labour Force Growth, Employment Land Capacity and Requirements

Ref	Description	Statistic	Unit	Step
A	Labour Force Growth 2021-2029	18,612	Jobs	
B	Average density 2020	64.1	Jobs/Hectare	K/N
C	Land requirement (ha)	290	Hectares	A/B

Table 4-19 Scenario 1: EMRA Job Targets, Employment Land Capacity and Requirements

Ref	Description	Statistic	Unit	Step
A	Eastern Midlands Regional Authority jobs (2016)	829,520	Jobs	
B	NPF / RSES - Additional Jobs by 2040 for EMRA	320,000	Jobs	
C	EMRA Annual Growth	13,333	Jobs	A/24
D	EMRA Total Jobs by 2031	1,029,520	Jobs	A+(C*15)
E	Fingal Jobs (2016)	90,484	Jobs	
F	Fingal's Jobs % share of EMRA Jobs (2016)	10.9%	Jobs	E/A
G	Fingal Additional Jobs per annum	1,454	Jobs	C*F
H	Projected total additional jobs for Fingal by 2029	18,907	Jobs	(C*13) *F
I	Total Jobs in Fingal 2029	109,391	Jobs	E+H
J	Projected Fingal jobs 2016-2020	5,818	Jobs	G*4
K	Projected Fingal total jobs by 2020	96,302	Jobs	E+J
L	Projected Fingal jobs 2021-2029	13,090	Jobs	G*9
M	Total employment zoned lands	4,574	Hectares	
N	Area developed 2020	1,502	Hectares	
O	Average density 2020	64.1	Jobs/Hectare	K/N
P	Proportion of employment zoning which has been developed	32.84%	Hectares	N/M
Q	Land available	3,072	Hectares	M-N
R	Land requirement (ha)	204	Hectares	L/O

\*Values in table appear rounded, but are calculated with decimals.

Just 32.8% of employment and enterprise zoned land in Fingal has been developed as of 2020 with a further 3,072 hectares of undeveloped land remaining. With consideration to future jobs targets and labour force growth, existing undeveloped employment lands have sufficient capacity to cater for such growth under the localised EMRA employment target and labour force growth projections well beyond 2029.

## 4 Baseline Assessment

### 4.2.2.3 Strategic housing developments

An assessment of Strategic Housing Developments (SHD) by Fingal County Council in 2020 Q3 indicates that over 2,600 units have been granted planning permission. To date, 105 have been completed in Portmarnock with a further 45 units under construction. The only other SHD in progress of development is located in Malahide with just 4 units commenced. A vast majority of SHDs are distributed along the Dublin Consolidation Area and east coast from Howth to Rush as illustrated in Figure 4-13.

Table 4-19 Fingal Strategic Housing Developments (2020 Q3)

Map ID	Ref No.	Planning Permission (No. Units)	Units Completed to Date	Units under Construction	Units Permitted but not Commenced
13	SHD/006/19	102	0	0	102
12	SHD/010/19	128	0	0	128
11	SHD/013/19	142	0	4	138
10	SHD/019/19	144	0	0	144
9	SHD002/17	150	105	45	0
8	SHD/012/19	153	0	0	153
7	SHD/003/19	165	0	0	165
6	SHD/004/19	177	0	0	177
5	SHDW/021/19	192	0	0	192
4	SHDW/016/19	210	0	0	210
3	SHDW/011/19	211	0	0	211
2	SHD/015/19	331	0	0	331
1	SHD/009/19	512	0	0	512
<b>Total</b>		<b>2617</b>	<b>105</b>	<b>49</b>	<b>2463</b>

# 4 Baseline Assessment

## Strategic Housing Development

- Fingal SHD Q3 2020
- Fingal Settlements
- Fingal County Council
- Fingal Settlements

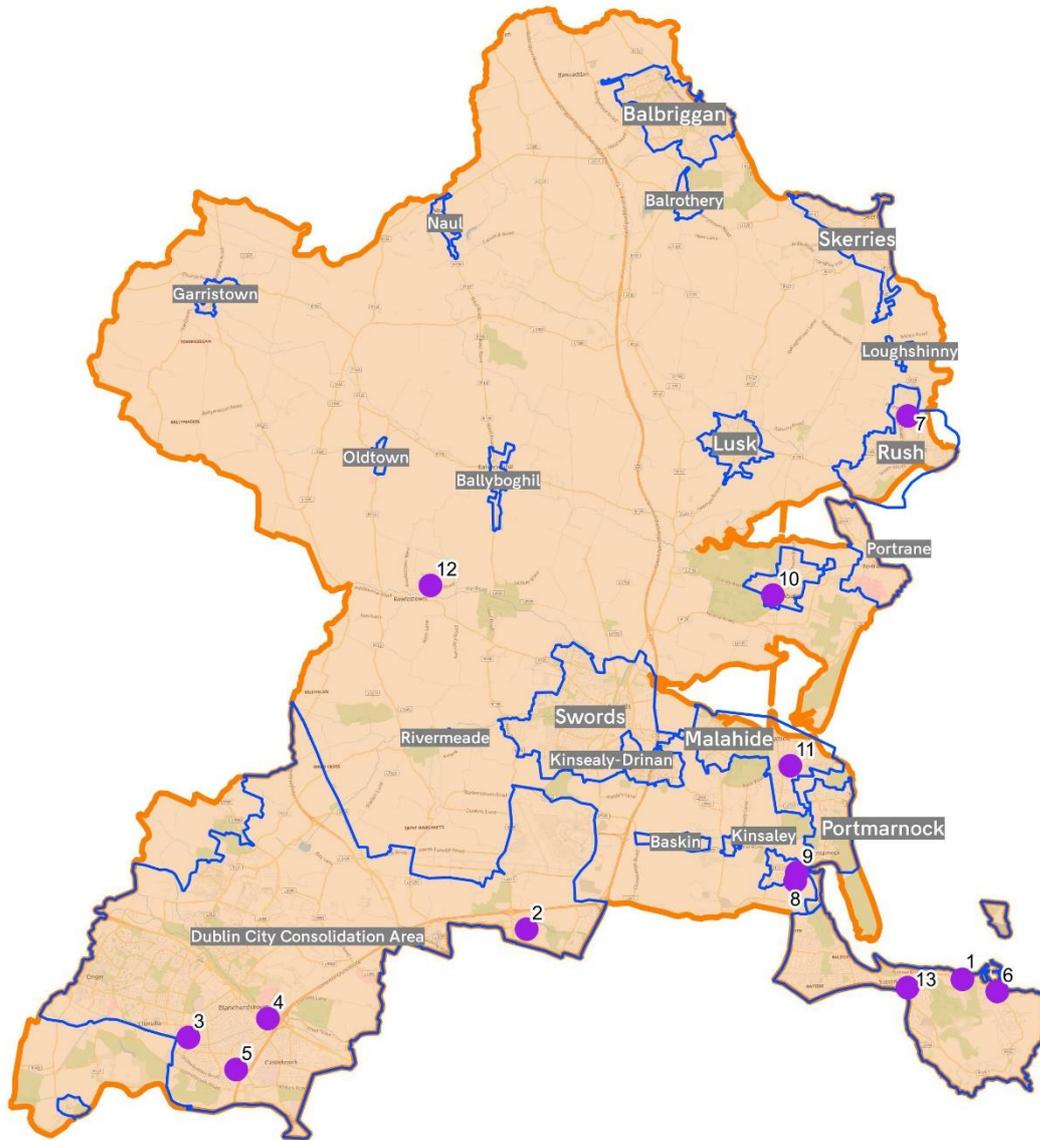


Figure 4-13 Fingal Strategic Housing Developments (2020 Q3)

## 4 Baseline Assessment

### 4.2.3 [Strategic Infrastructure Development](#)

The following Strategic Infrastructure Developments (SID) have been granted permission by either Fingal County Council or An Bord Pleanála since 2016 for commercial purposes or otherwise:

**Strategic Infrastructure Development: Health Services Executive Estates (SID/01/16)** for the development of a 170 bed National Forensic Mental Health Service Hospital at St. Ita's Hospital in Portrane. The proposed development site is to be located in St. Ita's Hospital Demesne in Portrane, Co. Dublin. Portrane is located 18km from Dublin city centre and is 3km east of Donabate. Both Portrane and Donabate are accessed via the R126 which connects to the M1 up north of Swords. The land area use is estimated to be 112 hectares. The development area includes neglected woodlands and agriculture lands. There are also a number of sports pitches in and around the site. In addition, a new wastewater treatment plant (WwTP) has finished development which is to the south of this site.

**Strategic Infrastructure Development: Thornton's Recycling** for a materials processing and transfer facility with capacity for 170,000 tonnes per annum of residual municipal solid waste (MSW) capable of processing segregated brown bin waste, waste wood and green waste. The development was approved by An Bord Pleanála in 2017 and to be developed in Millennium Business Park, Cappagh Road, Dublin 11. The site size is 2.4 hectares and is located within the Millennium Business Park on the Cappagh Road, Dublin 11. This will be located west of the M50 between the N2 and N3. Other notable business parks in the area is Rosemount Business Park, Stadium Business park, Ballycoolin Business park and Northwest Business Park. There is a large quarry (Huntstown Quarry) located to the east of the Millennium business park. 1.5km south-east is a residential area and another 2km to the south west, both across the M50 from the site. The Cappagh National Orthopaedic Hospital is located 1.3km to the south-east across the M50 motorway.

**Strategic Infrastructure Development: Irish Water (SID/02/18)** to develop a Regional sludge treatment centre and associated biosolids storage facility to be located at Newtown near Kilshane Cross. This facility will be co-located on the same site as the WwTP, which will have a handling capacity of 18,500 tonnes of dry solids every year.

**Strategic Infrastructure Development: Irish Water (SID/03/18)** to develop the Greater Dublin Drainage Project water treatment plan with a sludge hub centre, orbital sewer, outfall pipeline and regional biosolids storage facility. The new

## 4 Baseline Assessment

regional wastewater treatment facility is to be located in Clonghaugh with the orbital sewer pipeline stretching from Blanchardstown to Clonshaugh (25km in length) as well as a new pumping station at Abbottstown and an outfall pipeline to return treated water to the sea. The development elements sit between Conolly Hospital Blanchardstown and a point 1km to the north east of Irelands Eye. The M50 is towards the south and the N2 is located to the very north point of the area. The eastern side of development site contains industrial estates and business parks.

**Strategic Infrastructure Development: DAA PLC (SID/01/18)** for the continued use of the existing 8,840 space long-term car park in Dublin Airport (referred to as Holiday Blue site) and the existing 2,040 space long-term car park known as Express Red Zones Y and Z. The proposed development was approved by An Bord Pleanála for 10,880 long-term spaces area with ancillary infrastructure including access routes from the R108 and R132 roads, internal circulation routes, drainage, landscaping and other amenities. The development site is separated into two parking areas, the larger one being “Holiday Blue Car Park” which is 25.1 hectares and is located south west of the airport within Harristown on the south side of the R108. The other smaller parking site is known as “Express Red” is 10.6 hectares in size and is located south east of the airport terminals. This park is in between the R132 and the M1.

**Strategic Infrastructure Development: Commercial Project (SID/04/18)** for the permanent continuation of use for the existing long-term car park known as Quickpark and the construction of a new entrance building and reduction in car parking spaces from 6,240 spaces to 6,122 spaces and all ancillary support infrastructure. The site is located at Turnapin Great, Swords Road (Old Airport Road), Santry, Co. Dublin. The site has a size of approximately 17 hectares. There is access to the R132 Swords Road on the western side of the car park. This development also includes the demolition of a single storey office building which is to be replaced by a three storey entrance building.

**Strategic Infrastructure Development: Amazon Data Services Ireland Ltd. (SID/01/19)** for the provision of transmission lines between the Belcamp 220kV and 100kV substations located north of the R139 and the Darndale 110kV substation located in Clonshaugh. The proposed transmission line runs 2km in distance within Belcamp, Clonshaugh and Willsborough. The Belcamp substation is located to the north of the R139 road which links up with the M50/M1 motorways on the way to Malahide Road. The Greater Dublin Drainage Wastewater Treatment Plant will be located north of this substation.

## 4 Baseline Assessment

### 4.2.4 [Conclusion](#)

The Fingal Development Plan 2017-2023 has zoned all land in Fingal equating to over 45,000 hectares of land, the majority of which has been allocated to rural, open space, green belt and high amenity.

Analysis of industrial zoning for the local authority and at settlement and local level has provided insight as to the quantum of employment specific land use and the proportions of land remaining for future capacity. The rate of development is inconsistent across the settlement hierarchy with little remaining employment land capacity in several settlements including Malahide and Portmarnock, Baldoyle, Lusk and Skerries. However, there is considerable remaining capacity in the remaining settlements and employment areas. To date, approximately 32.8% of industrial lands have been developed leaving just 3,072 hectares remaining.

Analysis of employment and enterprise related land use zoning capacity has enabled identification of future employment targets for Fingal under the EMRA jobs growth targets. Application of such targets to current assessments of the rate of land use (mid-plan review and 2020 assessments conducted by Fingal County Council) has enabled determination of average job density within such lands and thus the ability to calculate an approximate future requirement for such a workforce. The resulting 13,090 jobs are forecasted at an average density of 61.4 to require 204 hectares of employment lands zoned by 2029.

## 4 Baseline Assessment

### 4.3 Enterprise activity within Fingal

#### 4.3.1 [Introduction](#)

An assessment of enterprise activity in Fingal covering the Dublin and National comparative context has been explored through analysis of business demography statistics, sectoral mapping, enterprise cluster mapping and vacancy analysis.

#### 4.3.2 [Enterprises Summary](#)

##### *4.3.2.1 National and Dublin context*

In 2018, the CSO published data on Business Demography which provides the most comprehensive data on enterprises and associated employment at state and county level. It should be noted that this is only available across County Dublin rather than for Fingal. The Business Demography data relates to all active and registered enterprises as well as related persons employed and engaged. This data has been analysed for Dublin and comparatively for the State to provide broader context as set out in Table 4-20.

In 2018 the following key insights were evident in County Dublin:

- A total of 88,161 enterprises were active and 750,204 persons were engaged in enterprises across Dublin (i.e. owners, relatives and/or employees).
- 32.6% of all active enterprises and 46.7% of all owners and employees for enterprises within the State are located in Dublin.
- The rate of new business development in Dublin accelerated over the past decade. Specifically, 16.4% growth in new businesses was evident during 2014 - 2018.
- 90.8% of all active enterprises in Dublin are classified as micro (i.e. under 10 staff) and this comprises 15.8% of the total persons engaged with enterprises in Dublin.
- Enterprises with more than ten employees account for just 9.2% of all enterprises but represent 84.2% of the population engaged with enterprises in Dublin.
- The main sectors that the Dublin enterprises contribute to (by quantum) are professional, scientific and technical activities (15.7%), wholesale and retail (10.8%) and construction (10.8%). These three sectors account for 37.3% of all active enterprises in total in Dublin and they generally align with the national comparison.

## 4 Baseline Assessment

- The principal sector of employment for enterprises in Dublin are Wholesale and retail (17.2%), Human Health and Social (10.8%) and Financial and insurance (8.8%). that account for 36.8% of all employees. These three sectors account for 36.8% of all persons engaged with enterprises in Dublin.

Table 4-20 Business Demography in the State and Dublin in 2018 (Source: CSO)

<b>Number of enterprises</b>	<b>Dublin</b>	<b>State</b>
<b>Total</b>	<b>88,161</b>	<b>270,344</b>
Total persons engaged - (owners and employees)	750,204	1,607,911
<b>% Change</b>		
2008-2010	-16.0%	-0.6%
2010-2012	-0.4%	0.7%
2012-2014	5.5%	-2.5%
2014-2016	10.8%	4.9%
2016-2018	8.8%	8.1%
<b>Micro enterprises (less than 10 employees)</b>		
% of all enterprises	91.9%	90.8%
% of all persons engaged in enterprises	15.8%	25.7%
<b>Enterprises with 10+ employees</b>		
% of all enterprises	9.2%	8.1%
% of all persons engaged in enterprises	84.2%	74.3%
<b>Top Three Sectors by Number of Enterprises</b>		
1	Professional, scientific, and technical activities (15.7%)	Construction (16.5%)
2	Wholesale and retail (10.8%)	Wholesale and retail (13.7%)
3	Construction (10.8%)	Professional, scientific, and technical activities (12.5%)
<b>Top Three Sectors by Number of Persons Engaged</b>		
1	Wholesale and retail (17.2%)	Wholesale and retail (16.8%)
2	Human Health and Social (10.8%)	Human Health and Social (10.3%)
3	Financial and insurance (8.8%)	Manufacturing (10.2%)

Source: CSO 2018 Tables BRA08 and BRA18

Further analysis of the enterprises in County Dublin by size is presented in Table 4-21. There were only 388 large enterprises (of at least 250 employees) registered in the county (or 0.38% of the total), however they jointly employ 359,748 people. Small, medium and large enterprises combined only account for 9.2% of all enterprises registered in Dublin. 118,700 people worked in micro-enterprises registered in the county. However, as micro-enterprises employ

## 4 Baseline Assessment

fewer people each, their share of all persons engaged (15.8%) is considerably smaller than their share of enterprises (90.8%).

Many micro-enterprises are run by an owner/manager, therefore owners account for a larger share of the total workforce of micro-enterprises.

Employees account for 67.7% of total persons engaged in microenterprises which means that 32.3% are owners. As such, micro-enterprises account for only 11.3% of all employees in enterprises. In total 88.7% of all employees work in the 8,133 enterprises with 10 or more staff.

Table 4-21 Number of active enterprises, persons engaged and employees by size in Dublin in 2018 (Source: CSO)

Employment Size	Active Enterprises	Employees	Persons Engaged	Employees as % of Persons Engaged
Under 10	80,028	80,374	118,700	67.7%
10 - 19	3,751	49,978	50,490	99.0%
20 - 49	2,548	76,959	77,171	99.7%
50 - 249	1,446	143,884	144,095	99.9%
250 and over	388	359,161	359,748	99.8%
<b>Total</b>	<b>88,161</b>	<b>710,356</b>	<b>750,204</b>	<b>94.7%</b>
% in Micro-Enterprise	90.8%	11.3%	15.8%	
% in Enterprise 10+	9.2%	88.7%	84.2%	

### 4.3.3 Sectoral Mapping

Geodirectory data from the final quarter of 2020 has been analysed to understand commercial properties within Fingal. This analysis has considered properties defined as commercial and both (i.e. both commercial and residential) and as categorised by NACE codes (which is the EU business activity operation classification scheme).

Specifically, this analysis considers over 7,000 commercial properties with a NACE code and the distribution of properties by NACE code is set out in Table 4-22 and illustrated in Figure 4-14. Based on this information, the largest quantum of commercial properties by sector (i.e. NACE code) in Fingal are:

- (G) wholesale and retail trade; repair of motor vehicles and motorcycles

## 4 Baseline Assessment

- (I) accommodation and food service activities
- (Q) human health and social work activities
- (S) other service activities

Table 4-22 Commercial properties by NACE sector in Fingal (2020 Q4)

NACE Classification of Activity	Number	%
A - AGRICULTURE, FORESTRY AND FISHING	414	5.9%
B - MINING AND QUARRYING	2	0.0%
C - MANUFACTURING	318	4.5%
D - ELECTRICITY, GAS, STEAM AND AIR CONDITIONING SUPPLY	13	0.2%
E - WATER SUPPLY; SEWERAGE, WASTE MANAGEMENT AND REMEDIATION ACTIVITIES	30	0.4%
F - CONSTRUCTION	231	3.3%
G - WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES	1,536	21.9%
H - TRANSPORTATION AND STORAGE	375	5.3%
I - ACCOMMODATION AND FOOD SERVICE ACTIVITIES	754	10.7%
J - INFORMATION AND COMMUNICATION	174	2.5%
K - FINANCIAL AND INSURANCE ACTIVITIES	206	2.9%
L - REAL ESTATE ACTIVITIES	125	1.8%
M - PROFESSIONAL, SCIENTIFIC, AND TECHNICAL ACTIVITIES	464	6.6%
N - ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES	312	4.4%
O - PUBLIC ADMINISTRATION AND DEFENCE; COMPULSORY SOCIAL SECURITY	97	1.4%
P - EDUCATION	225	3.2%
Q - HUMAN HEALTH AND SOCIAL WORK ACTIVITIES	703	10.0%
R - ARTS, ENTERTAINMENT AND RECREATION	395	5.6%
S - OTHER SERVICE ACTIVITIES	655	9.3%
Total	7,029	100%

## 4 Baseline Assessment

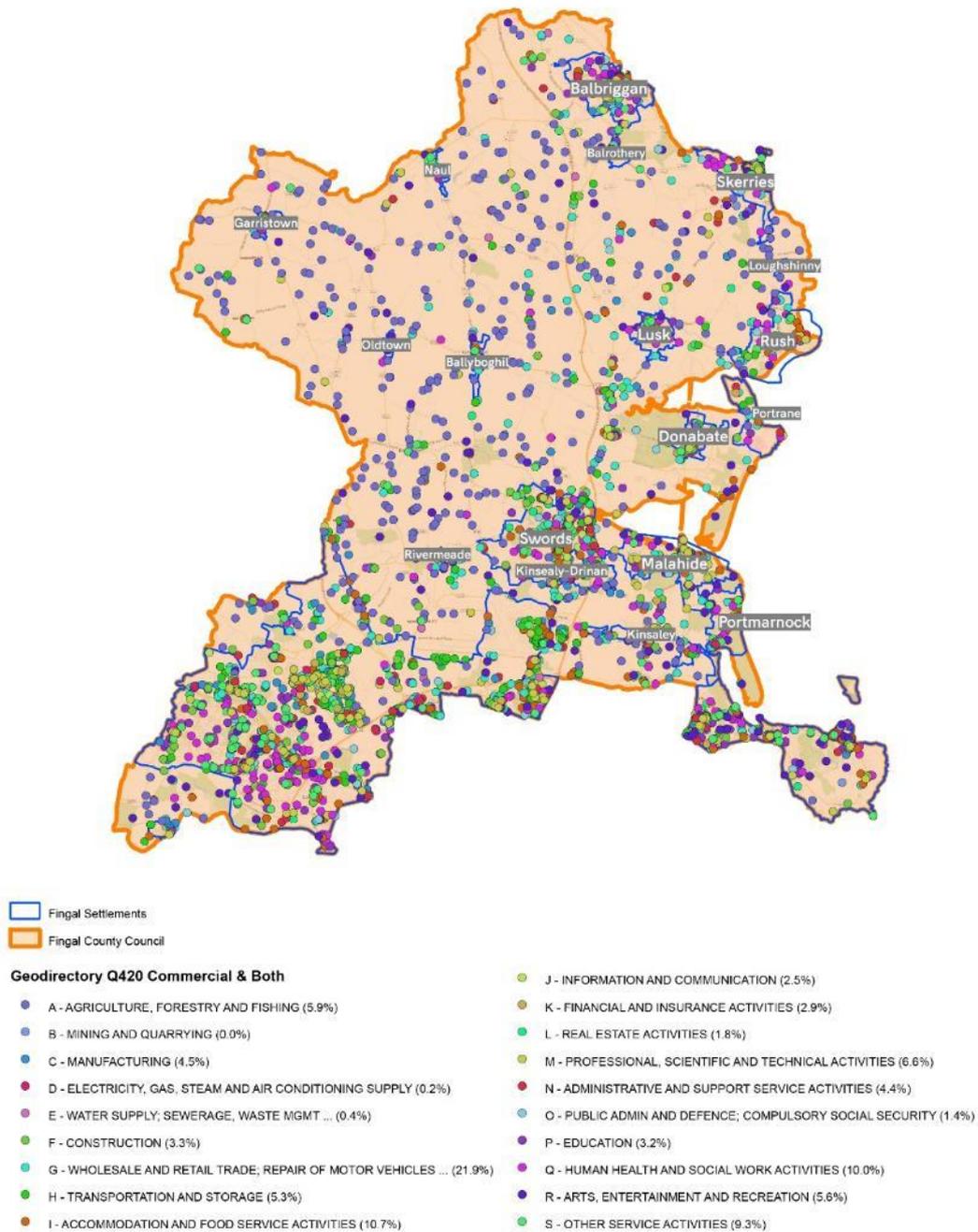


Figure 4-14 Commercial businesses by NACE code in Fingal (Source: Geodirectory)

## 4 Baseline Assessment

### 4.3.4 [Enterprise Cluster Mapping](#)

Analysis of the spatial relationship between enterprise was carried out to determine clustering of industries. Clustering analysis further highlights the concentration of enterprise hubs and colocation of businesses. The following section presents enterprise clustering for each of the major settlements within their respective boundaries, within 1 kilometre of the boundary and provides insight as to local distribution within the area.

Furthermore, statistics on industry of employment for residents of each settlement have been compared to local enterprises to highlight any relationships between enterprise and employment, noting that the larger settlements are likely to have a higher proportion of commuters and therefore less correlation between residents and enterprise.

#### *4.3.4.1 Consolidated Metropolitan Area*

There are 3,560 businesses within the immediate Dublin Consolidation Metropolitan Area (CMA) settlement boundary accounting for 50.5% of NACE coded businesses in Fingal. The primary industries are:

- G - Wholesale and Retail Trade; Vehicle repairs – 795 businesses (22.3%)
- Q - Human Health and Social Work Activities – 371 businesses (10.4%)
- I - Accommodation and Food Service Activities – 337 businesses (9.5%)

The Dublin CMA is comprised of core urban settlements including: Swords, Blanchardstown, Baldoyle, Castleknock, Clonsilla, Howth, Mulhuddart Village, Sutton, Santry (Incl. Ballymun), Balgriffin and Belcamp, Charlestown and Meakstown.

There are a further 342 businesses within 1km of the settlement boundary indicating high concentration within the immediate vicinity of the settlement. These businesses are mostly in wholesale and retail trade, education, agriculture, forestry and fishing, transportation and storage, and administrative and support services.

Notably, businesses are distributed in three locations in the CMA. The largest cluster is located in the west around Blanchardstown (2,600 or 63% of businesses), with a further cluster in the Dublin Airport area (800 or 20% of businesses) and a further smaller region is located in the east covering Clongriffin-Howth (700 or 17% of businesses).

## 4 Baseline Assessment

In the west the distribution of businesses is evenly spread out throughout the region. However, there are notable areas with higher density such as Blanchardstown main road, Ongar main road, Clonsilla road and Castleknock road which have the highest density of businesses within the more built up area of the CMA. Further north-west in the DEZ there are large clusters around Stadium Business Park, Rosemount Business Park, Cruiserath Road Business Park and Mitchelstown road.

A significant cluster of businesses is located around the Dublin Airport, and south of the Dublin Airport following the Swords road, this is a cluster for many businesses that deal with tourism, transport and storage indicating strong links with Dublin Airport.

In the east, businesses are more dispersed, with a concentration of businesses within three main areas: the north side of Howth along the main street following Harbour road toward the pier, a small yet dense area in central Sutton and to the west in Baldoyle Industrial Estate.

The east side compared to the west is less dense with a reasonable difference in quantity of businesses.

There are over 10 clusters within the wholesale and retail trade industry as identified via NACE code activity. These clusters are primarily retail and collocated to service local residential neighbourhoods and town and village centres. There are clusters identified in Howth, Sutton, and a major hub in Blanchardstown. There are further retailers which are likely wholesale or larger scale retailers on the basis of location in the DEZ, Furry Park and associated industrial estates, and Clonsilla industrial estate.

Enterprises and organisations defined as human health and social work activities are more irregularly distributed to an extent with some light clustering in general employment centres such as Blanchardstown. There is a more significant degree of businesses located within residential neighbourhoods than any other industry and there are very few located outside the immediate developed area.

The largest clusters of accommodation and food services in the CMA are in Howth along Harbour Road and the west pier, Sutton, Castleknock, Blanchardstown and Ongar. There are food services enterprises located in proximity to the major industrial centres such as the DEZ and Dublin Airport. Enterprises involved in manufacturing, construction, transportation, and storage are predominantly located in the major industrial centres in the DEZ and surrounding Dublin Airport.

## 4 Baseline Assessment

There are many businesses further out from the central settlement areas. As illustrated in Figure 4-15 there are 253 businesses within 1km of the settlement. There is a degree of overlap with other settlements such as Swords given the size of the consolidation area.

Table 4-23 sets out summary information relating to employment and job density within each industry for the CMA with comparative information for Fingal. The employment information below has been sourced from POWSCAR analysis and relates to the jobs of those working within the CMA rather than residents and is thus more reflective of density. The industry with the highest employment density is ICT and financial with an average of 40 jobs per enterprise, in contrast with the expected lows of just 4.3 jobs per agricultural enterprise. As is to be expected there is stark contrast between agricultural jobs and enterprises in comparison to the Fingal average.

Table 4-23 Business Clusters and Jobs in the CMA (GeoDirectory 2020 Q4)

CMA	Enterprises	Jobs in CMA	Jobs per Enterprise	% of Area Jobs in CMA	Jobs in Fingal	% of Area Jobs in Fingal
Agriculture, forestry, and fishing	26	111	4.3	0.3%	753	14.7%
Manufacturing, mining, and quarrying	249	6,358	25.5	15.0%	9,254	68.7%
Construction	144	1,513	10.5	3.6%	2,732	55.4%
Wholesale, Retail Trade	795	14,262	17.9	33.5%	36,357	39.2%
Information and Communication, Financial	236	9,388	39.8	22.1%	18,397	51.0%
Public Administration and Defence	52	1,621	31.2	3.8%	3,816	42.5%
Education, Human Health, Social Work Activities	490	7,495	15.3	17.6%	15,287	49.0%
Other Service Activities	1568	1,404	0.9	3.3%	3,258	43.1%
Not stated	0	372	-	0.9%	630	59.0%
<b>Total</b>	<b>3,560</b>	<b>42,524</b>	<b>11.9</b>	<b>100%</b>	<b>90,484</b>	

# 4 Baseline Assessment

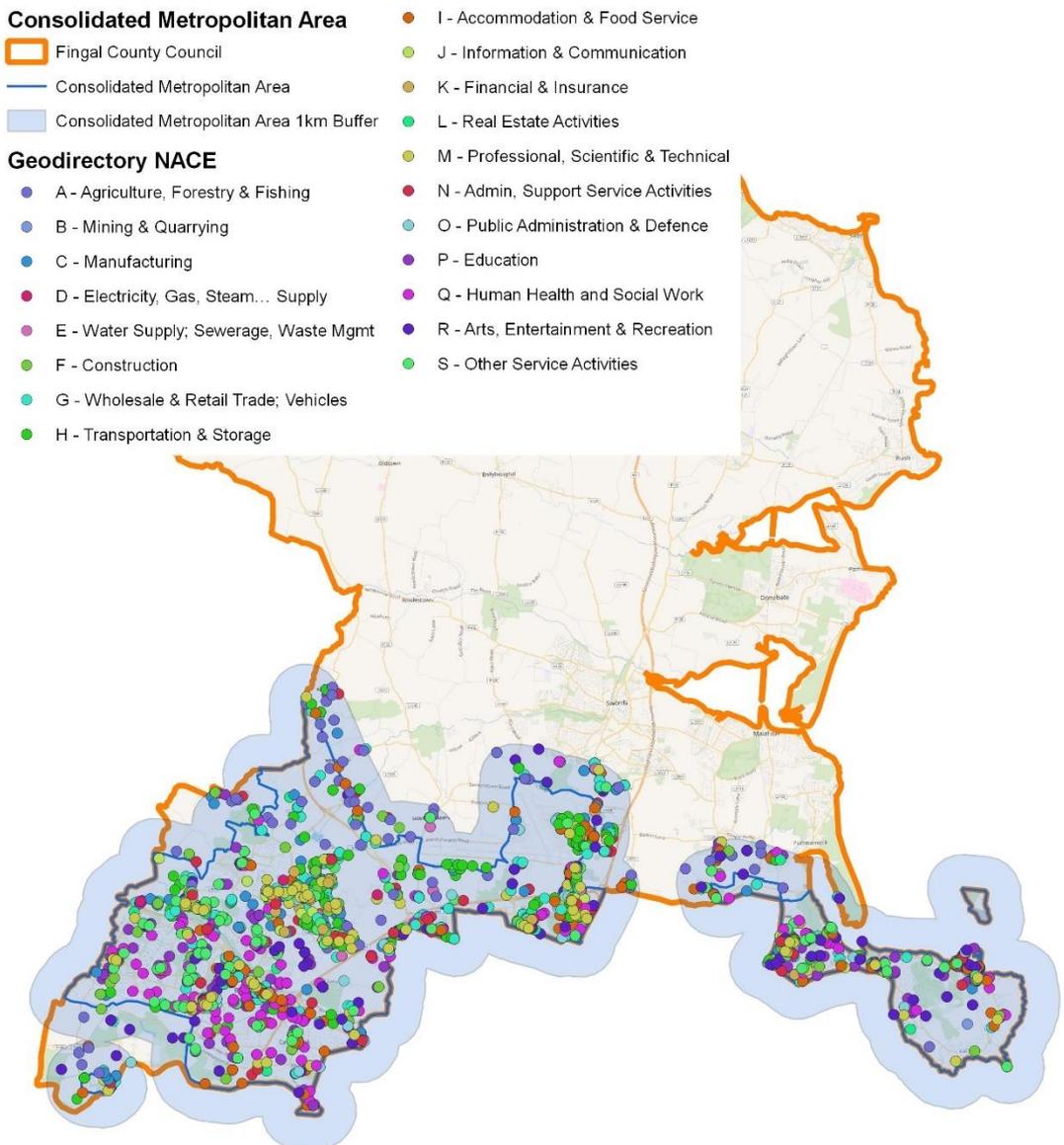


Figure 4-15 Businesses by NACE Activity in the CMA (GeoDirectory 2020 Q4)

# 4 Baseline Assessment

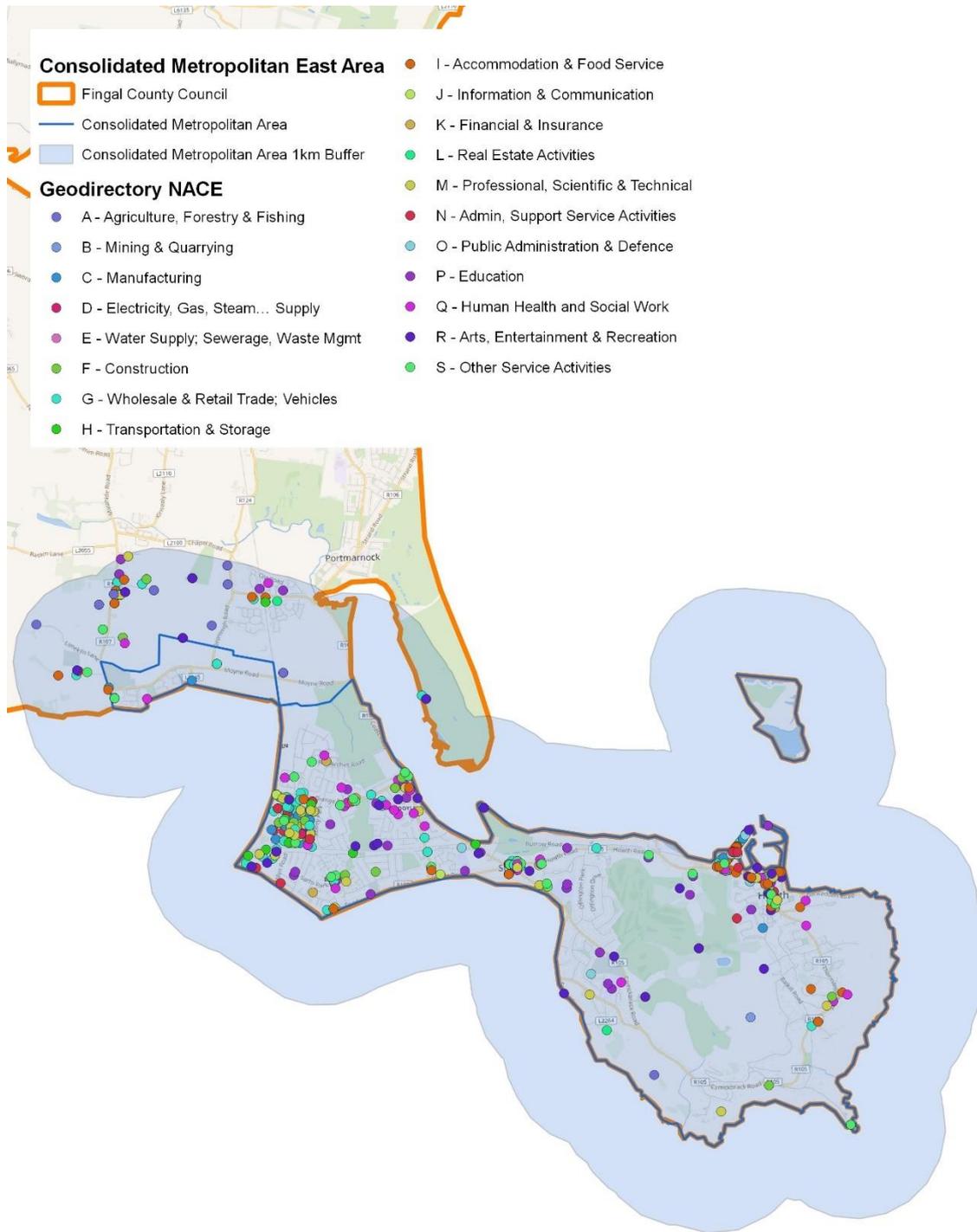


Figure 4-16 Businesses by NACE Activity in the eastern CMA (GeoDirectory 2020 Q4)

## 4 Baseline Assessment

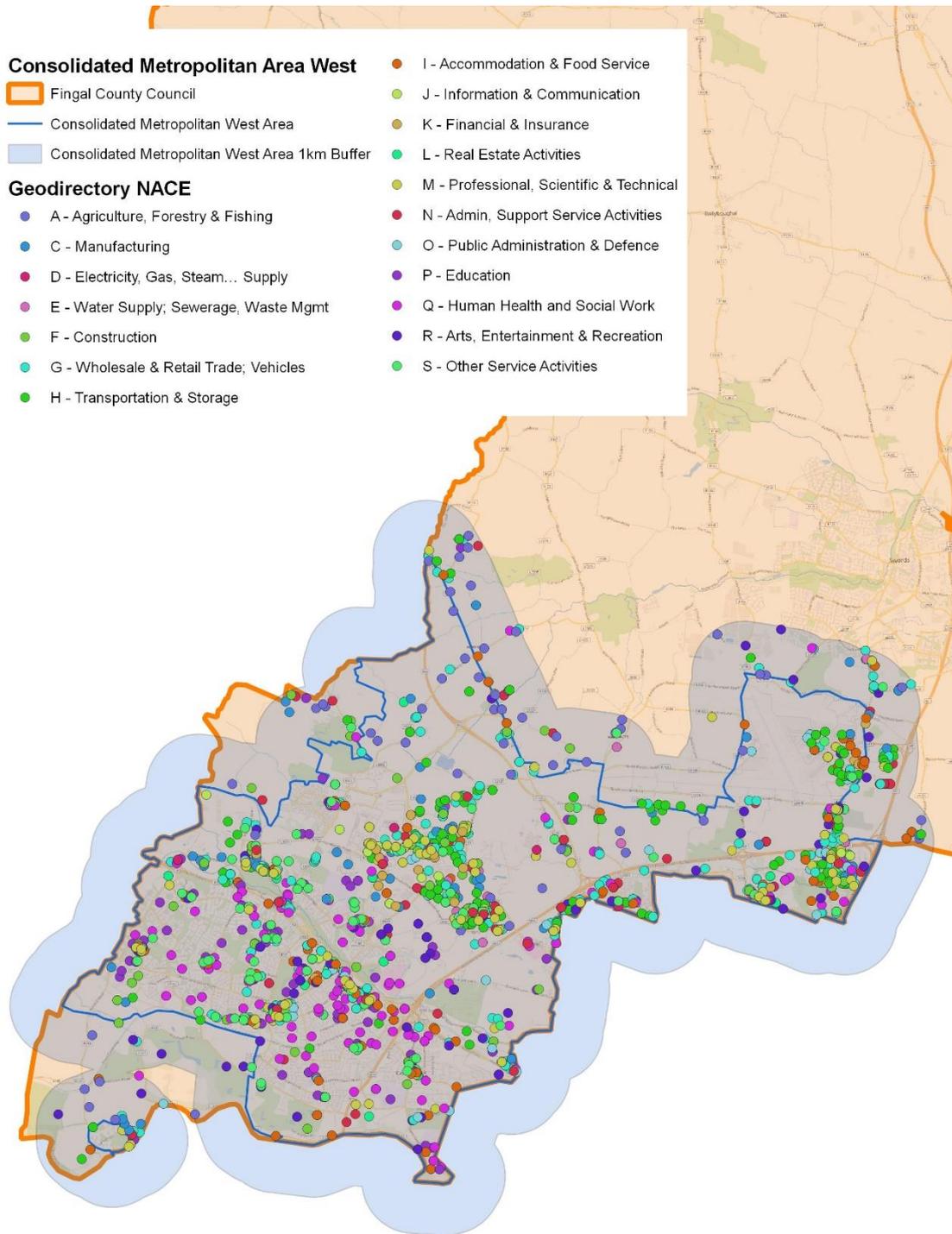


Figure 4-17 Businesses by NACE Activity in the western and central CMA (GeoDirectory 2020 Q4)

## 4 Baseline Assessment

### 4.3.4.2 Swords

There are 805 businesses within the immediate Swords settlement boundary accounting for 11.5% of NACE coded businesses in Fingal. The primary industries are:

- G - Wholesale and Retail Trade; Vehicle repairs – 209 businesses (26.0%)
- I - Accommodation and Food Service Activities – 119 businesses (14.8%)
- Q - Human Health and Social Work Activities – 101 businesses (12.5%)

There are a further 162 businesses within 1km of the settlement boundary indicating a significant proportion of businesses are contained in the town environs. These businesses are primarily in wholesale and retail trade, education, agriculture, forestry and fishing, professional, scientific and technical activities and arts, entertainment and recreation.

The majority of businesses in Swords are centralised along the main street. The west side of Swords is sparse with businesses compared to the east side as it is largely residential.

There are two primary clusters within the wholesale and retail trade industry as identified via NACE code activity. These clusters differ in terms of specific activity within the broad industry and have been identified on Swords main street and the Dublin road and further south at Airside Retail Park. Those enterprises in the town centre are predominantly smaller retail businesses whereas those in the southern retail park are larger retail stores relating to activities such as vehicle dealerships, bulky goods and hardware.

Human health and social work activities which account for 12.5% of businesses in Swords are generally spread out in residential areas with a single cluster in the town centre along the main street.

Accommodation and food services are highly concentrated to the town centre with three minor pockets along Lakeshore Drive south of Airside Retail Park, up at the R125 and Rathbeale Road junction and in the north west of Swords at Applewood Main Street.

There is no distinct clustering pattern for the construction, ICT or education industries. There is a dominant professional services cluster in the town centre with groups of enterprises relating to financial and insurance, real estate and professional, scientific and technical activities. These are generally located within

## 4 Baseline Assessment

the confines of Bridge Street to the north, Church Road to the south and Forester way to the east.

There are 162 additional businesses on the settlement outskirts within 1km of the town boundary as illustrated in Figure 4-18. There is a degree of overlap with other settlements such as Swords given the size of the consolidation area.

Table 4-24 sets out summary information relating to employment and job density within each industry for Swords with comparative information for Fingal. The employment information below has been sourced from POWSCAR analysis and relates to the jobs of those working within the Swords rather than residents and is thus more reflective of density. The industries with the highest employment density are ICT and finance as well as manufacturing with an average of 75 jobs and 65 jobs per enterprise respectively. Swords has over 20% more persons employed in the retail industry than the Fingal average.

Table 4-24 Business Clusters and Jobs in Swords (GeoDirectory 2020 Q4)

Swords	Enter-prises	Jobs in Swords	Jobs per Enterprise	% of Area Jobs in Swords	Jobs in Fingal	% of Area Jobs in Fingal
Agriculture, forestry, and fishing	5	10	2.0	0.1%	753	1.3%
Manufacturing, mining, and quarrying	26	1701	65.4	11.4%	9,254	18.4%
Construction	17	311	18.3	2.1%	2,732	11.4%
Wholesale, Retail Trade	209	5425	26.0	36.4%	36,357	14.9%
Information and Communication, Financial	54	4062	75.2	27.2%	18,397	22.1%
Public Administration and Defence	12	1229	3.3	8.2%	3,816	32.2%
Education, Human Health, Social Work Activities	114	1673	14.7	11.2%	15,287	10.9%
Other Service Activities	368	430	1.2	2.9%	3,258	13.2%
Not stated	-	79	-	0.5%	630	12.5%
<b>Total</b>	<b>805</b>	<b>14,920</b>	<b>12.9</b>	<b>100%</b>	<b>90,484</b>	

# 4 Baseline Assessment

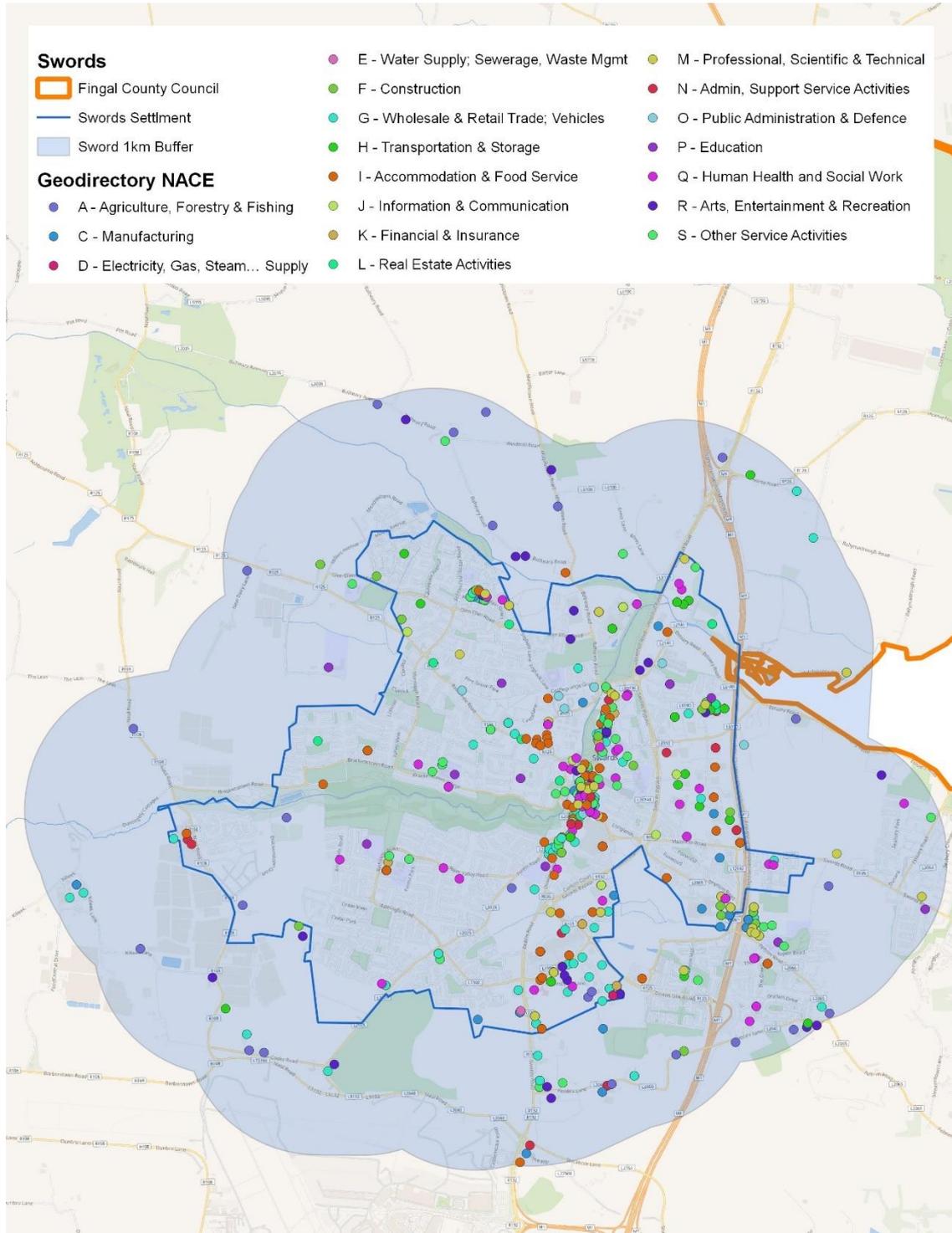


Figure 4-18 Businesses by NACE Activity in Swords (GeoDirectory 2020 Q4)

## 4 Baseline Assessment

### 4.3.4.3 Portmarnock

There are 130 businesses within the immediate Portmarnock settlement boundary accounting for 1.3% of NACE coded businesses in Fingal. The primary industries are:

- G - Wholesale and Retail Trade; Vehicle repairs – 26 businesses (20.0%)
- I - Accommodation and Food Service Activities – 29 businesses (22.3%)
- Q - Human Health and Social Work Activities – 20 businesses (15.4%)

Notably there are no business in Portmarnock in the water supply and waste management, construction nor ICT industries.

The concentration of businesses in Portmarnock is located along the south western portion of Strand Road toward the Station and Coast Road junction with some lightly dispersed businesses along the road to the north. There is a minor cluster of mixed enterprises along station road.

Enterprises within retail and wholesale trade, human health and social work and accommodation and food services are primarily clustered on Strand Road between the Coast Road junction to the south and Carrickhill Road to the northwest. These are the most clustered industries within Portmarnock with no further spatial patterns or relationship observed given the low number of businesses in the settlement.

There are a further 102 businesses within 1km of the settlement boundary however this is due to a significant degree of overlap with Malahide. These businesses are primarily in professional, scientific and technical activities, wholesale and retail trade and arts, entertainment and recreation.

Table 4-25 sets out summary information relating to employment and job density within each industry for Portmarnock with comparative information for Fingal. The employment information below has been sourced from POWSCAR analysis and relates to the jobs of those working within Portmarnock rather than residents and is thus more reflective of density. The industry with the highest job density is ICT and financial with an average of 61 jobs per enterprise, significantly higher than any other industry in the area. The average jobs density in Portmarnock across all industries is 5.9.

## 4 Baseline Assessment

Table 4-25 Business Clusters and Jobs in Portmarnock (GeoDirectory 2020 Q4)

Portmarnock	Enterprises	Jobs in Portmarnock	Jobs per Enterprise	% of Area Jobs in Portmarnock	Jobs in Fingal	% of Area Jobs in Fingal
Agriculture, forestry, and fishing	3	< 6	-	-	753	-
Manufacturing, mining, and quarrying	4	13	3.3	1.7%	9,254	0.1%
Construction	0	32	-	4.2%	2,732	1.2%
Wholesale, Retail Trade	26	275	10.6	36.1%	36,357	0.8%
Information and Communication, Financial	1	61	61.0	8.0%	18,397	0.3%
Public Administration and Defence	0	8	-	1.0%	3,816	0.2%
Education, Human Health, Social Work Activities	28	272	9.7	35.7%	15,287	1.8%
Other Service Activities	68	91	1.3	11.9%	3,258	2.8%
Not stated	0	8	-	1.0%	630	1.3%
<b>Total</b>	<b>130</b>	<b>762</b>	<b>5.9</b>	<b>100%</b>	<b>90,484</b>	

# 4 Baseline Assessment

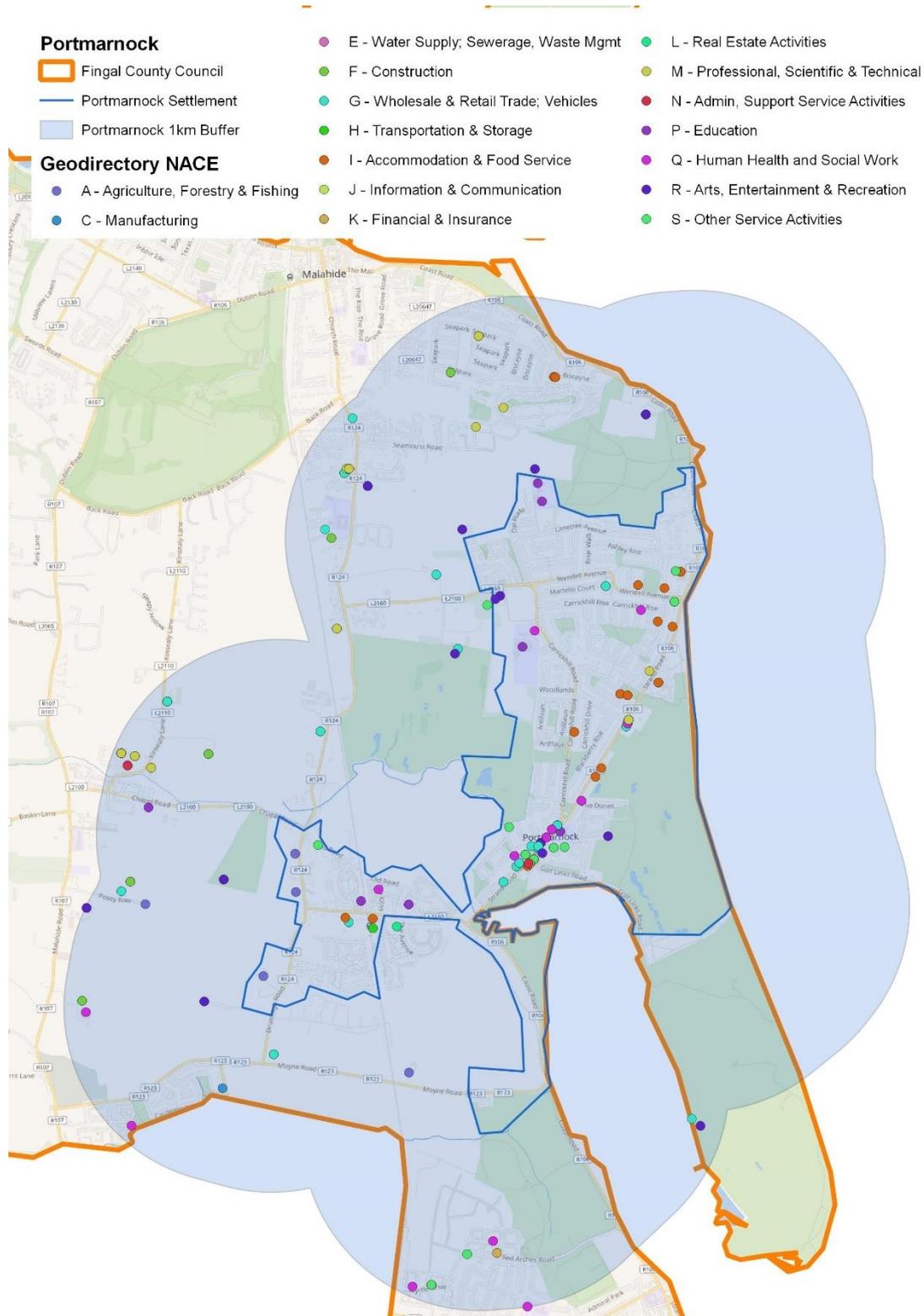


Figure 4-19 Business Clusters and Jobs in Portmarnock (GeoDirectory 2020 Q4)

## 4 Baseline Assessment

### 4.3.4.4 Baskin

There are 8 businesses within the immediate Baskin settlement boundary accounting for 0.1% of NACE coded businesses in Fingal. The primary industries are:

- A – Agriculture, Forestry and Fishing – 2 businesses (25%)
- F – Construction – 1 business (12.5%)
- G – Wholesale and Retail Trade; Vehicle repairs – 2 businesses (25%)
- I - Accommodation and Food Service Activities – 2 businesses (25%)

Baskin has no notable business clusters given the low number of enterprises however there is provision for unemployment with 117 businesses within 1km of the settlement boundary with 4 neighbouring settlement: Portmarnock, Malahide, Swords and the CMA. These additional businesses are primarily in Wholesale and Retail trade, Professional, Scientific and Technical activities and Administrative and Support Service activities.

Outside the Baskin boundary within 1km distance there are two clusters located in the west at the Airport Business Park across the M1 and another in the east following the Malahide road into Kinsaley.

Table 4-26 sets out summary information relating to employment and job density within each industry for Baskin with comparative information for Fingal. There is limited information relating to employment insight for Baskin due to statistical suppression requirements.

Table 4-26 Businesses by NACE Activity in Baskin (GeoDirectory 2020 Q4)

Baskin	Enter-prises	Jobs in Baskin	Jobs per Enter-prise	% of Area Jobs in Baskin	Jobs in Fingal	% of Area Jobs in Fingal
Agriculture, forestry, and fishing	2	-	-	-	753	-
Manufacturing, mining, and quarrying	0	-	-	-	9,254	-
Construction	1	< 6	-	-	2,732	-
Wholesale, Retail Trade	2	< 6	-	-	36,357	-
Information and Communication, Financial	0	-	-	-	18,397	-
Public Administration and Defence	0	-	-	-	3,816	-

## 4 Baseline Assessment

Baskin	Enter-prises	Jobs in Baskin	Jobs per Enter-prise	% of Area Jobs in Baskin	Jobs in Fingal	% of Area Jobs in Fingal
Education, Human Health, Social Work Activities	0	< 6	-	-	15,287	-
Other Service Activities	3	< 6	-	-	3,258	-
Not stated	0	-	-	-	630	-
Total	8	8	1.0	100%	90,484	

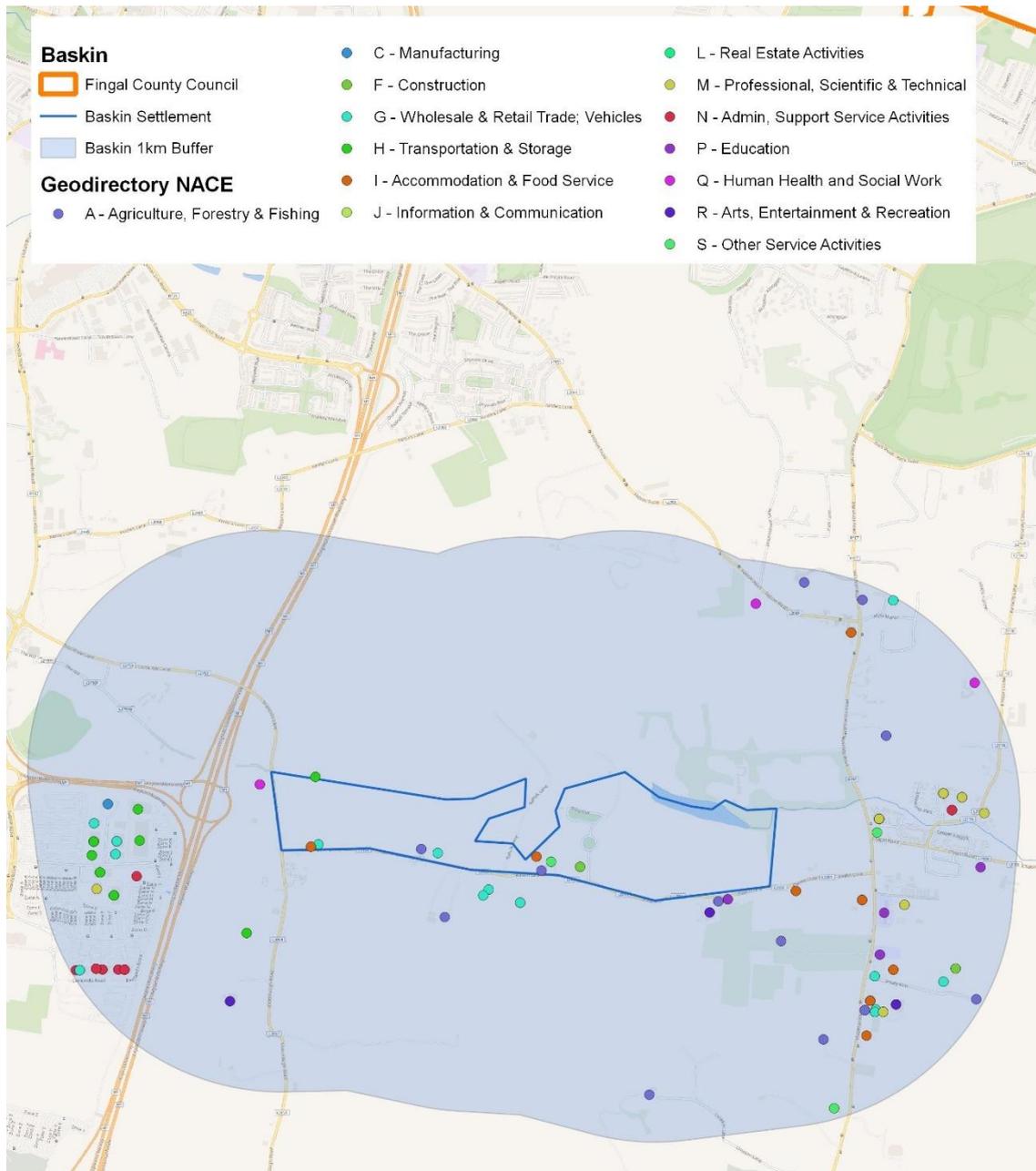


Figure 4-20 Businesses by NACE Activity in Baskin (GeoDirectory 2020 Q4)

## 4 Baseline Assessment

### 4.3.4.5 Donabate

There are 89 businesses within the immediate Donabate settlement boundary accounting for 1.3% of NACE coded businesses in Fingal. The primary industries are:

- Q - Human Health and Social Work Activities – 17 businesses (19.1%)
- G – Wholesale and Retail Trade; Vehicle repairs – 16 businesses (18.0%)
- I - Accommodation and Food Service Activities – 10 businesses (11.2%)

Similar to neighbouring settlements such as Portmarnock, enterprises in Donabate are largely concentrated in the town centre along Main Street and further along routes such as Beaverstown and Portrane Road.

Human health and social work activities which are the largest single industry in Donabate (19.1%) are concentrated on Main Street and along the Portrane road in proximity to Donabate Community college and Donabate National School with the remainder randomly distributed. Wholesale and retail enterprise are generally clustered in the town centre with a few units distributed throughout the town. Accommodation and food services are highly concentrated in the town centre with just a single unit outside this cluster neighbouring the Donabate Community College. The only additional cluster identified was the professional, scientific and technical industry with units in the Old Post Office Business Centre and immediate surroundings.

These are the most clustered industries within Donabate with no further spatial patterns or relationship observed given the low number of businesses in the settlement.

There are a further 13 businesses within 1km of Donabate settlement boundary. These businesses are primarily in agriculture, forestry and fishing, wholesale and retail trade, transportation and storage, arts, entertainment and recreation and public administration and defence.

Table 4-27 indicates employment and job density within each industry for Donabate with comparative information for Fingal. The employment information below has been sourced from POWSCAR analysis and relates to the jobs of those working within Donabate rather than residents and is thus more reflective of density. The industries with the highest job density are ICT and financial (15 jobs per enterprise), education, human health and social work (14 jobs per enterprise) and construction (13 jobs per enterprise). The average jobs density in Donabate across all industries is 6.8.

## 4 Baseline Assessment

Table 4-27 Businesses by NACE Activity in Donabate (GeoDirectory 2020 Q4)

Donabate	Enterprises	Jobs in Donabate	Jobs per Enterprise	% of Area Jobs in Donabate	Jobs in Fingal	% of Area Jobs in Fingal
Agriculture, forestry, and fishing	1	< 6	-	-	753	-
Manufacturing, mining, and quarrying	1	< 6	-	-	9,254	-
Construction	3	39	13.0	6.4%	2,732	1.4%
Wholesale, Retail Trade	16	161	10.1	26.5%	36,357	0.4%
Information and Communication, Financial	4	60	15.0	9.9%	18,397	0.3%
Public Administration and Defence	0	< 6	-	-	3,816	-
Education, Human Health, Social Work Activities	21	294	14.0	48.4%	15,287	1.9%
Other Service Activities	43	37	0.9	6.1%	3,258	1.1%
Not stated	0	7	-	1.2%	630	1.1%
<b>Total</b>	<b>89</b>	<b>608</b>	<b>6.8</b>	<b>100%</b>	<b>90,484</b>	

## 4 Baseline Assessment

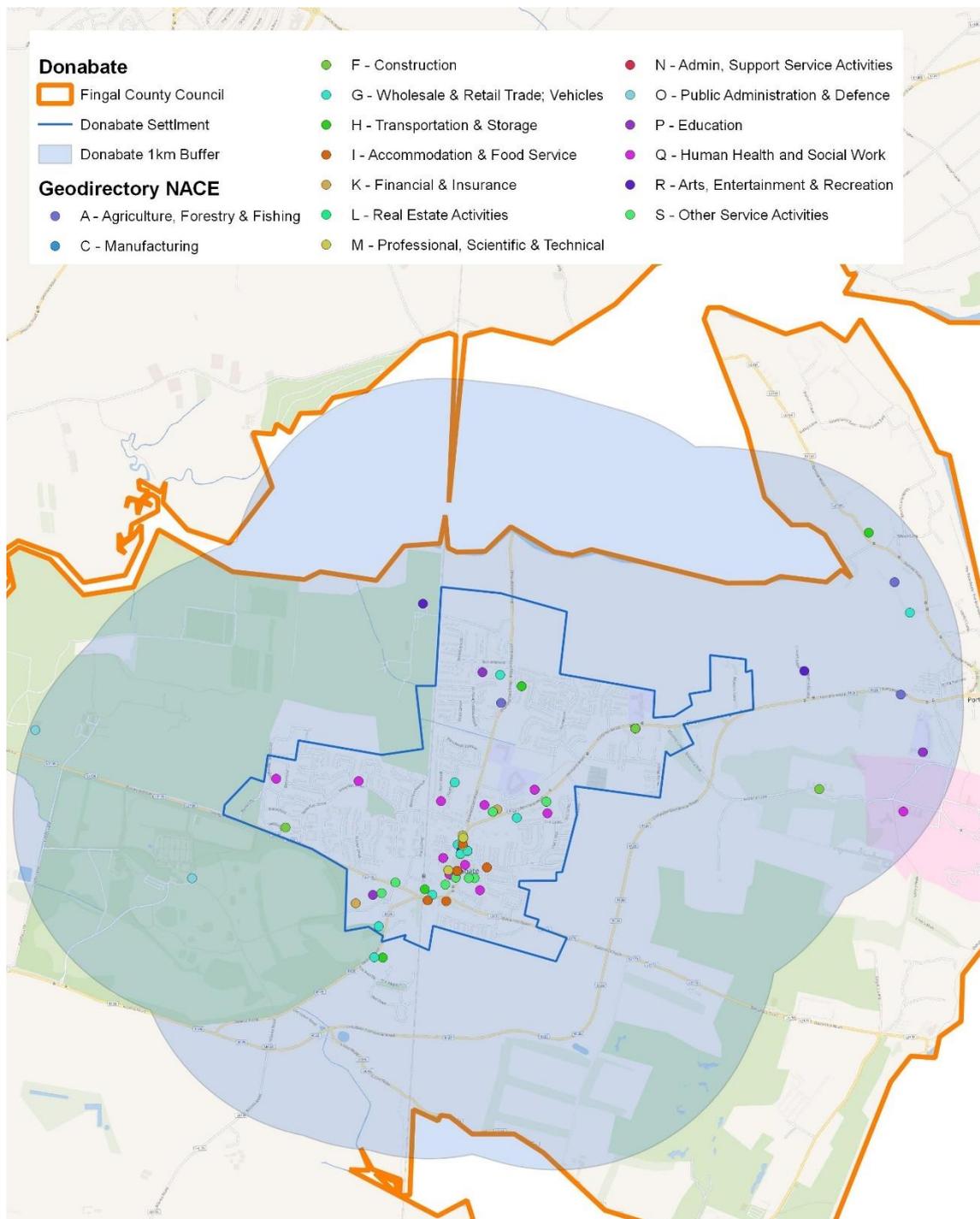


Figure 4-21 Businesses by NACE Activity in Donabate (GeoDirectory 2020 Q4)

## 4 Baseline Assessment

### 4.3.4.6 Malahide

There are 345 businesses within the immediate Malahide settlement boundary accounting for 4.9% of NACE coded businesses in Fingal. The primary industries are:

- G - Wholesale and Retail Trade; Vehicle repairs – 54 businesses (15.7%)
- I - Accommodation and Food Service Activities – 59 businesses (17.1%)
- Q - Human Health and Social Work Activities – 48 businesses (13.9%)

Enterprise in Malahide is highly clustered in a single location in the town centre at the junction of Main Street, Church Road and New Street containing 262 of the total businesses in the settlement. The remaining businesses within Malahide settlement are evenly dispersed across the settlement with no observable spatial pattern.

The following industry groups are concentrated in the town centre, wholesale and retail trade, accommodation and food services, ICT, financial services, real estate, professional, scientific and technical activities, human health and social work and arts, entertainment and recreation.

There are a further 214 businesses within 1km of the settlement boundary given significant overlap with Swords, Kinsealy and Portmarnock. These businesses are primarily in Wholesale and Retail trade, Education, Agriculture, Forestry and Fishing, Professional, Scientific and Technical activities and Arts, Entertainment and Recreation.

Table 4-28 indicates employment and job density within each industry for Malahide with comparative information for Fingal. The employment information below has been sourced from POWSCAR analysis and relates to the jobs of those working within Malahide rather than residents and is thus more reflective of density. The industry with the highest job density is wholesale and retail trade with an average of 13.7 jobs per enterprise which contrasts significantly with the County average. The average jobs density in Malahide across all industries is 5.4.

## 4 Baseline Assessment

Table 4-28 Businesses by NACE Activity in Malahide (GeoDirectory 2020 Q4)

Malahide	Enterprises	Jobs in Malahide	Jobs per Enterprise	% of Area Jobs in Malahide	Jobs in Fingal	% of Area Jobs in Fingal
Agriculture, forestry, and fishing	0	< 6	-	-	753	-
Manufacturing, mining, and quarrying	5	28	5.6	1.5%	9,254	0.3%
Construction	6	44	7.3	2.4%	2,732	1.6%
Wholesale, Retail Trade	54	738	13.7	39.7%	36,357	2.0%
Information and Communication, Financial	27	285	10.6	15.3%	18,397	1.5%
Public Administration and Defence	3	30	10.0	1.6%	3,816	0.8%
Education, Human Health, Social Work Activities	53	485	9.2	26.1%	15,287	3.2%
Other Service Activities	197	236	1.2	12.7%	3,258	7.2%
Not stated	0	12	-	0.6%	630	1.9%
Total	345	1,859	5.4	100%	90,484	

# 4 Baseline Assessment

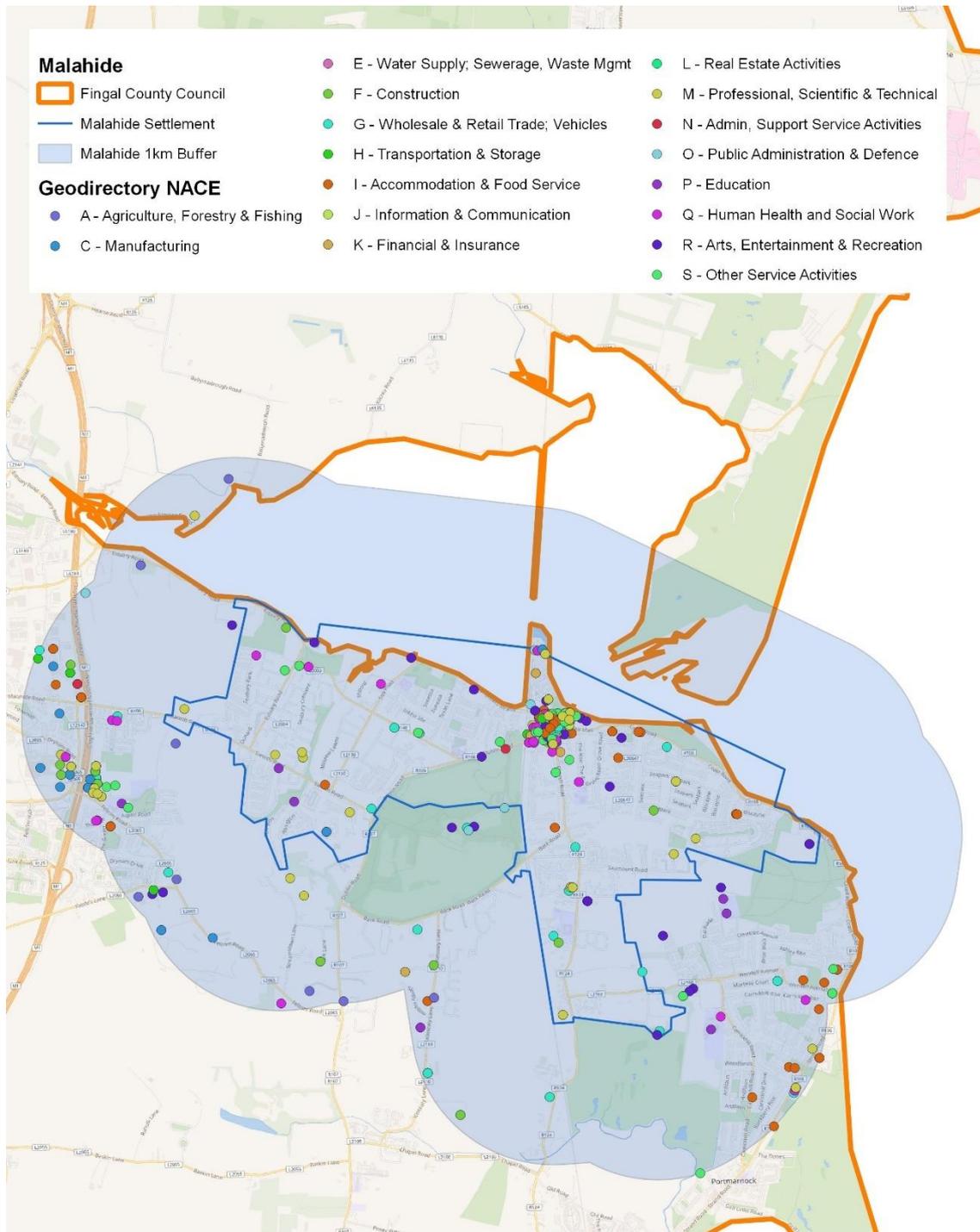


Figure 4-22 Businesses by NACE Activity in Malahide (GeoDirectory 2020 Q4)

## 4 Baseline Assessment

### 4.3.4.7 Balbriggan

There are 370 businesses within the immediate Balbriggan settlement boundary accounting for 5.3% of NACE coded businesses in Fingal. The primary industries are:

- G - Wholesale and Retail Trade; Vehicle repairs – 94 businesses (25.4%)
- I - Accommodation and Food Service Activities – 48 businesses (13.0%)
- Q - Human Health and Social Work Activities – 39 businesses (10.5%)

Balbriggan is densely populated with enterprise leading to both generally well distributed businesses as well as clear clusters. With the town centre acting as the core hub along Drogheda Street, businesses are clustered here and along the radiating road network as spokes along Hampton Street and the R132. There is a further cluster to the south west at Balbriggan Business Park, Fingal Bay Business Park and Stephenstown Industrial Estate.

The following industries are highly concentrated within the town centre, wholesale and retail trade, accommodation and food services, professional, scientific and technical activities, administration, human health and social work and arts. The remaining industries are well distributed with the exception of clustering of professional, scientific and technical activities and manufacturing industries in the south western industrial parks.

There are a further 36 businesses within 1km of the settlement boundary indicating high concentration within the immediate vicinity. These businesses are primarily in wholesale and retail trade, education, agriculture, forestry and fishing, and accommodation and food service activities.

Table 4-29 identifies employment and job density in Balbriggan with comparative information for Fingal. The employment information below has been sourced from POWSCAR analysis and relates to the jobs of those working within Balbriggan rather than residents and is thus more reflective of density. The industries with the highest job density are manufacturing (35.7 jobs per enterprise), and public administration (36.1 jobs per enterprise). The average jobs density in Balbriggan is higher than a majority of settlements at 8.8.

## 4 Baseline Assessment

Table 4-29 Businesses by NACE Activity in Balbriggan (GeoDirectory 2020 Q4)

Balbriggan	Enterprises	Jobs in Balbriggan	Jobs per Enterprise	% of Area Jobs in Balbriggan	Jobs in Fingal	% of Area Jobs in Fingal
Agriculture, forestry, and fishing	1	16	16.0	0.5%	753	2.1%
Manufacturing, mining, and quarrying	10	357	35.7	10.9%	9,254	3.9%
Construction	7	96	13.7	2.9%	2,732	3.5%
Wholesale, Retail Trade	94	962	10.2	29.4%	36,357	2.6%
Information and Communication, Financial	19	357	18.8	10.9%	18,397	1.9%
Public Administration and Defence	9	325	36.1	9.9%	3,816	8.5%
Education, Human Health, Social Work Activities	61	975	16.0	29.8%	15,287	6.4%
Other Service Activities	169	160	0.9	4.9%	3,258	4.9%
Not stated	0	23	-	0.7%	630	3.7%
<b>Total</b>	<b>370</b>	<b>3,271</b>	<b>8.8</b>	<b>100%</b>	<b>90,484</b>	

# 4 Baseline Assessment

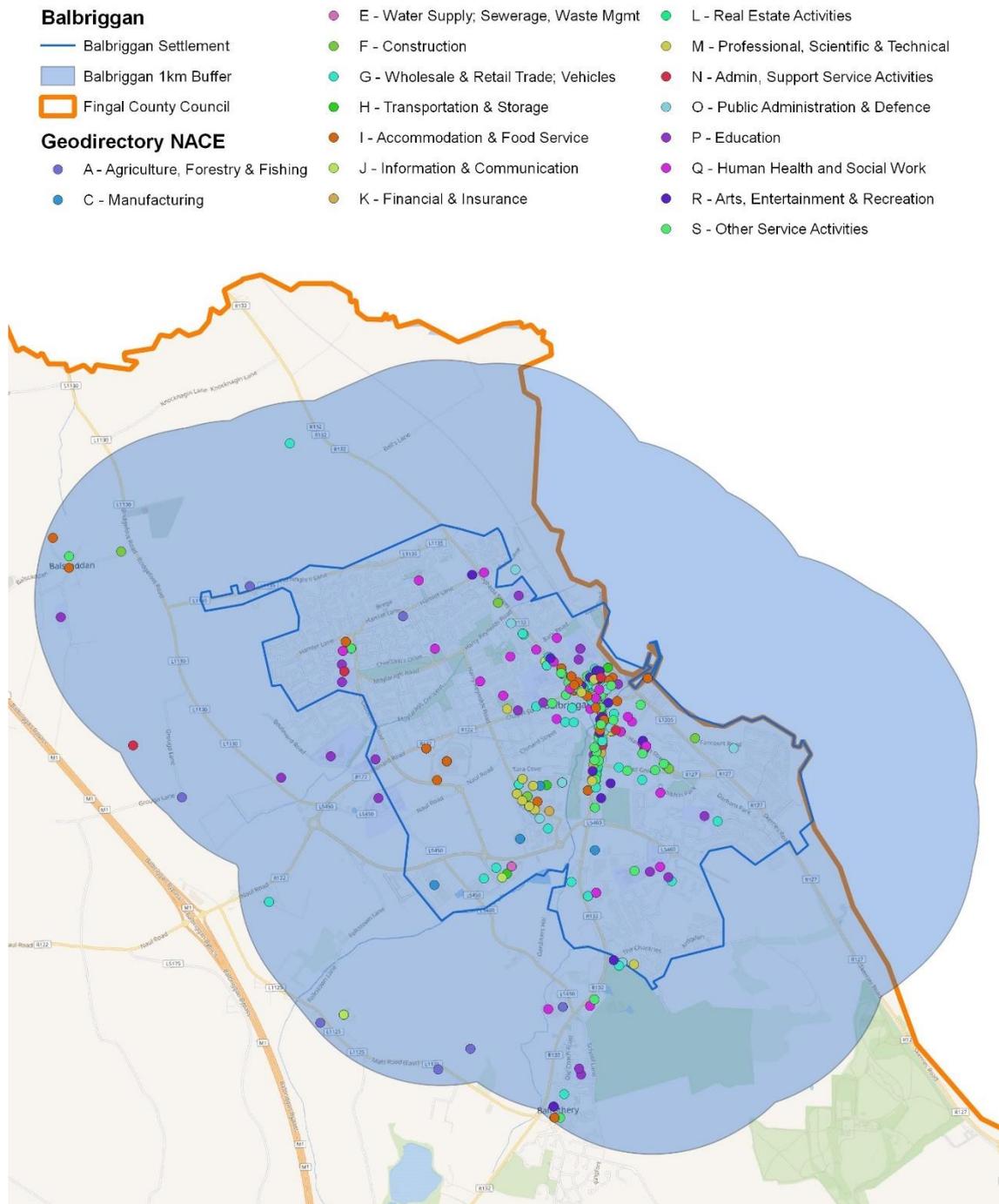


Figure 4-23 Businesses by NACE Activity in Balbriggan (GeoDirectory 2020 Q4)

## 4 Baseline Assessment

### 4.3.4.8 Lusk

There are 73 businesses within the immediate Lusk settlement boundary accounting for 1.0% of NACE coded businesses in Fingal. The primary industries are:

- G - Wholesale and Retail Trade; Vehicle repairs – 19 businesses (26.0%)
- Q - Human Health and Social Work Activities – 12 businesses (16.4%)
- I - Accommodation and Food Service Activities – 7 businesses (9.6%)

Businesses in Lusk, although limited in number, are generally well distributed along the town centre and intersecting road network. Notably there are three agricultural enterprises within the settlements located around Post Office Road and Chapel Road alongside a minor cluster of manufacturing enterprises. The remaining industries are generally evenly distributed throughout the settlement. Notably there are no business in Lusk in the ICT industry.

There are a further 22 businesses within 1km of the settlement boundary indicating low concentration within the immediate vicinity. These businesses are primarily in wholesale and retail trade, and agriculture, forestry and fishing.

Table 4-30 sets out employment and job density within each industry for Lusk with comparative information for Fingal. The employment information below has been sourced from POWSCAR analysis and relates to the jobs of those working within Lusk rather than residents and is thus more reflective of density. The industry with the highest job density is ICT and financial services with an average of 22 jobs per enterprise noting that this is due to a single ICT/finance enterprise employing 22 people. The average jobs density in Malahide across all industries is 6.7, notably higher than some of the larger neighbouring settlements.

## 4 Baseline Assessment

Table 4-30 Businesses by NACE Activity in Lusk (GeoDirectory 2020 Q4)

Lusk	Enter-prises	Jobs in Lusk	Jobs per Enterprise	% of Area Jobs in Lusk	Jobs in Fingal	% of Area Jobs in Fingal
Agriculture, forestry, and fishing	4	56	14.0	11.5%	753	7.4%
Manufacturing, mining, and quarrying	3	8	2.7	1.6%	9,254	0.1%
Construction	1	8	8.0	1.6%	2,732	0.3%
Wholesale, Retail Trade	19	170	8.9	34.8%	36,357	0.5%
Information and Communication, Financial	1	22	22.0	4.5%	18,397	0.1%
Public Administration and Defence	2	11	5.5	2.2%	3,816	0.3%
Education, Human Health, Social Work Activities	14	181	12.9	37.0%	15,287	1.2%
Other Service Activities	29	31	1.1	6.3%	3,258	1.0%
Not stated	0	< 6 persons	-	-	630	-
<b>Total</b>	<b>73</b>	<b>489</b>	<b>6.7</b>	<b>100%</b>	<b>90,484</b>	

## 4 Baseline Assessment

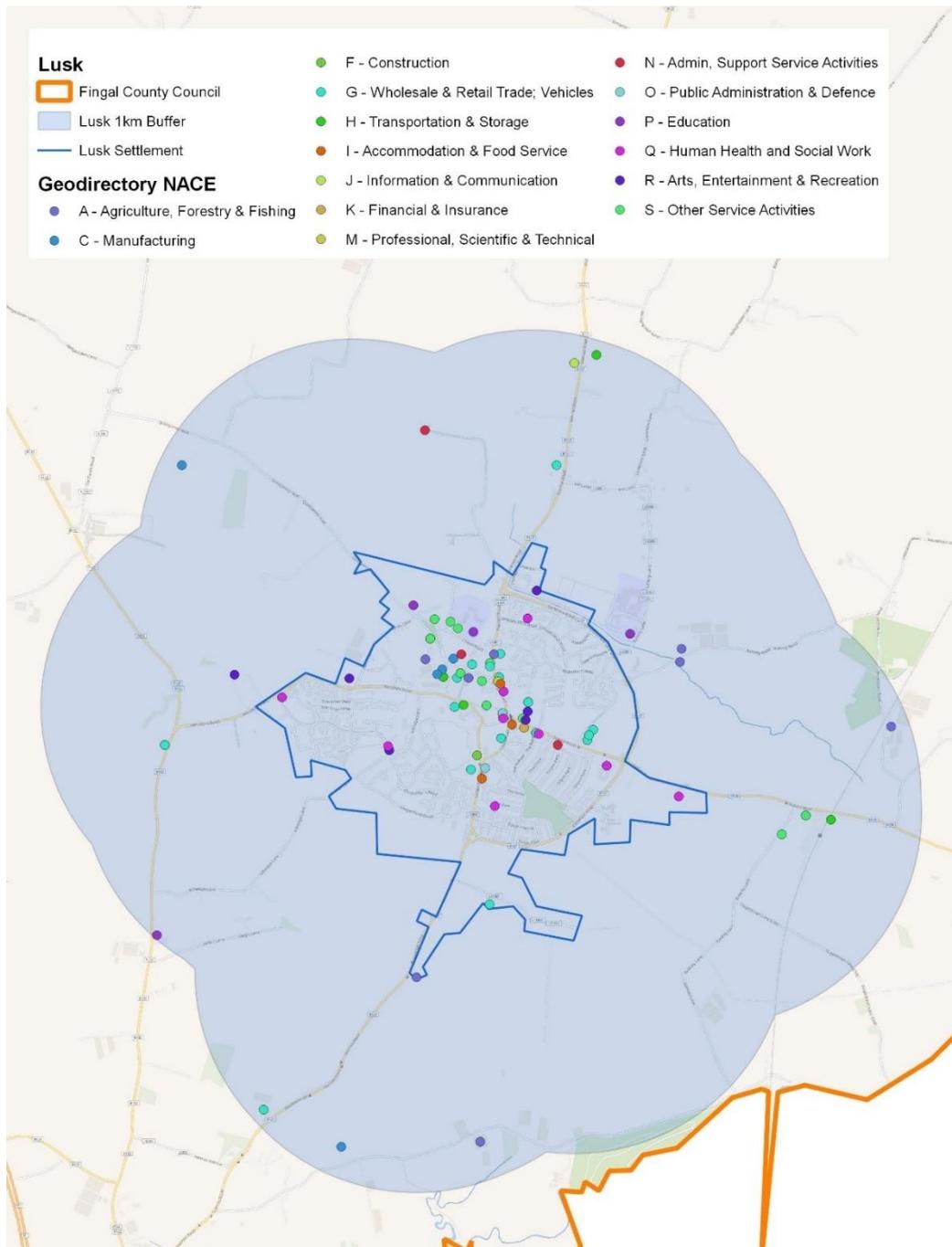


Figure 4-24 Businesses by NACE Activity in Lusk (GeoDirectory 2020 Q4)

## 4 Baseline Assessment

### 4.3.4.9 Rush

There are 146 businesses within the immediate Rush settlement boundary accounting for 2.1% of NACE coded businesses in Fingal. The primary industries are:

- G - Wholesale and Retail Trade; Vehicle repairs – 33 businesses (22.6%)
- I - Accommodation and Food Service Activities – 28 businesses (19.2%)
- Q - Human Health and Social Work Activities – 17 businesses (11.6%)

Industry in Rush is highly concentrated to the main road from Rush National School to Lower Main Street (along the R128). Whilst not clustered, there is a notable number of agriculture enterprises within the settlement boundary.

Wholesale and retail trades are clustered in the town centre as well as to the west near the settlement boundary at Channel Road. Human health and social work activities as well as accommodation and food services are highly clustered in the town centre. Further, there is a significant proportion of arts, entertainment and recreation enterprises in the town centre. There are no manufacturing nor ICT businesses in Rush.

There are a further 26 businesses within 1km of the settlement boundary indicating high concentration within the immediate vicinity. These businesses are primarily in agriculture, forestry and fishing, wholesale and retail trade, and human health and social work activities.

Table 4-31 sets out employment and job density in Rush with comparative information for Fingal. The employment information below has been sourced from POWSCAR analysis and relates to the jobs of those working within Rush rather than residents and is thus more reflective of density. The industry with the highest job density is ICT and financial services with 31.5 jobs per enterprise, notably higher than any other industry. The average jobs density in Rush is 6.1 jobs per enterprise.

## 4 Baseline Assessment

Table 4-31 Businesses by NACE Activity in Rush (GeoDirectory 2020 Q4)

Rush	Enter-prises	Jobs in Rush	Jobs per Enterprise	% of Area Jobs in Rush	Jobs in Fingal	% of Area Jobs in Fingal
Agriculture, forestry, and fishing	9	93	10.3	10.4%	753	12.4%
Manufacturing, mining, and quarrying	0	9	-	1.0%	9,254	0.1%
Construction	2	34	17.0	3.8%	2,732	1.2%
Wholesale, Retail Trade	33	310	9.4	34.8%	36,357	0.9%
Information and Communication, Financial	2	63	31.5	7.1%	18,397	0.3%
Public Administration and Defence	1	< 6 persons	-	-	3,816	-
Education, Human Health, Social Work Activities	21	302	14.4	33.9%	15,287	2.0%
Other Service Activities	78	66	0.8	7.4%	3,258	2.0%
Not stated	0	14	-	1.6%	630	2.2%
<b>Total</b>	<b>146</b>	<b>892</b>	<b>6.1</b>	<b>100%</b>	<b>90,484</b>	

# 4 Baseline Assessment

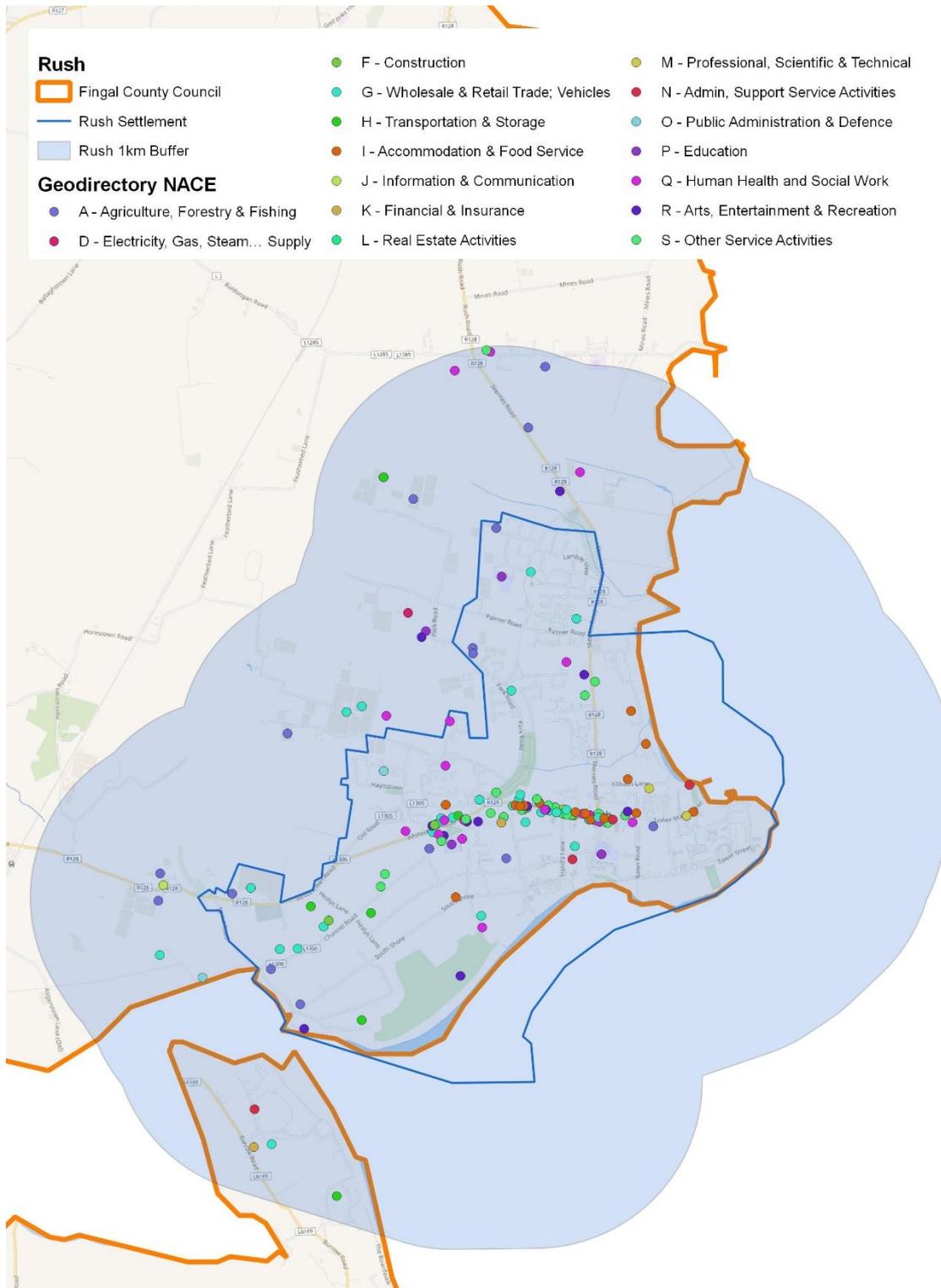


Figure 4-25 Businesses by NACE Activity in Rush (GeoDirectory 2020 Q4)

## 4 Baseline Assessment

### 4.3.4.10 *Skerries*

There are 218 businesses within the immediate Skerries settlement boundary accounting for 3.1% of NACE coded businesses in Fingal. The primary industries are:

- G - Wholesale and Retail Trade; Vehicle repairs – 55 businesses (25.2%)
- I - Accommodation and Food Service Activities – 45 businesses (20.6%)
- Q - Human Health and Social Work Activities – 27 businesses (12.4%)

Businesses in Skerries are strongly concentrated in the town centre with 172 of the 218 businesses located surrounding the main street, R122, New Street, Church Street and Harbour Road.

Wholesale and retail trade, accommodation and food services and human health and social work which comprise the three main industries in Skerries are concentrated in the town centre. There is a minor cluster of financial and insurance, real estate activities and professional, scientific and technical activities in the town centre.

There are a further 31 businesses within 1km of the settlement boundary indicating high concentration within the immediate vicinity. These businesses are primarily in agriculture, forestry and fishing, and accommodation and food services.

Table 4-32 sets out employment and job density in Skerries with comparative information for Fingal. The employment information below has been sourced from POWSCAR analysis and relates to the jobs of those working within Skerries rather than residents and is thus more reflective of density. The industry with the highest job density is construction with 25 jobs per enterprise, markedly higher than any other industry. The average jobs density in Skerries is 5.6 jobs per enterprise.

## 4 Baseline Assessment

Table 4-32 Businesses by NACE Activity in Skerries (GeoDirectory 2020 Q4)

Skerries	Enterprises	Jobs in Skerries	Jobs per Enterprise	% of Area Jobs in Skerries	Jobs in Fingal	% of Area Jobs in Fingal
Agriculture, forestry, and fishing	3	< 6 persons	-	-	753	-
Manufacturing, mining, and quarrying	3	11	3.7	0.9%	9,254	0.1%
Construction	1	25	25.0	2.0%	2,732	0.9%
Wholesale, Retail Trade	55	431	7.8	35.1%	36,357	1.2%
Information and Communication, Financial	9	140	15.6	11.4%	18,397	0.8%
Public Administration and Defence	4	15	3.8	1.2%	3,816	0.4%
Education, Human Health, Social Work Activities	34	504	14.8	41.1%	15,287	3.3%
Other Service Activities	109	91	0.8	7.4%	3,258	2.8%
Not stated	0	< 6 persons	-	-	630	-
<b>Total</b>	<b>218</b>	<b>1,227</b>	<b>5.6</b>	<b>100%</b>	<b>90,484</b>	

# 4 Baseline Assessment

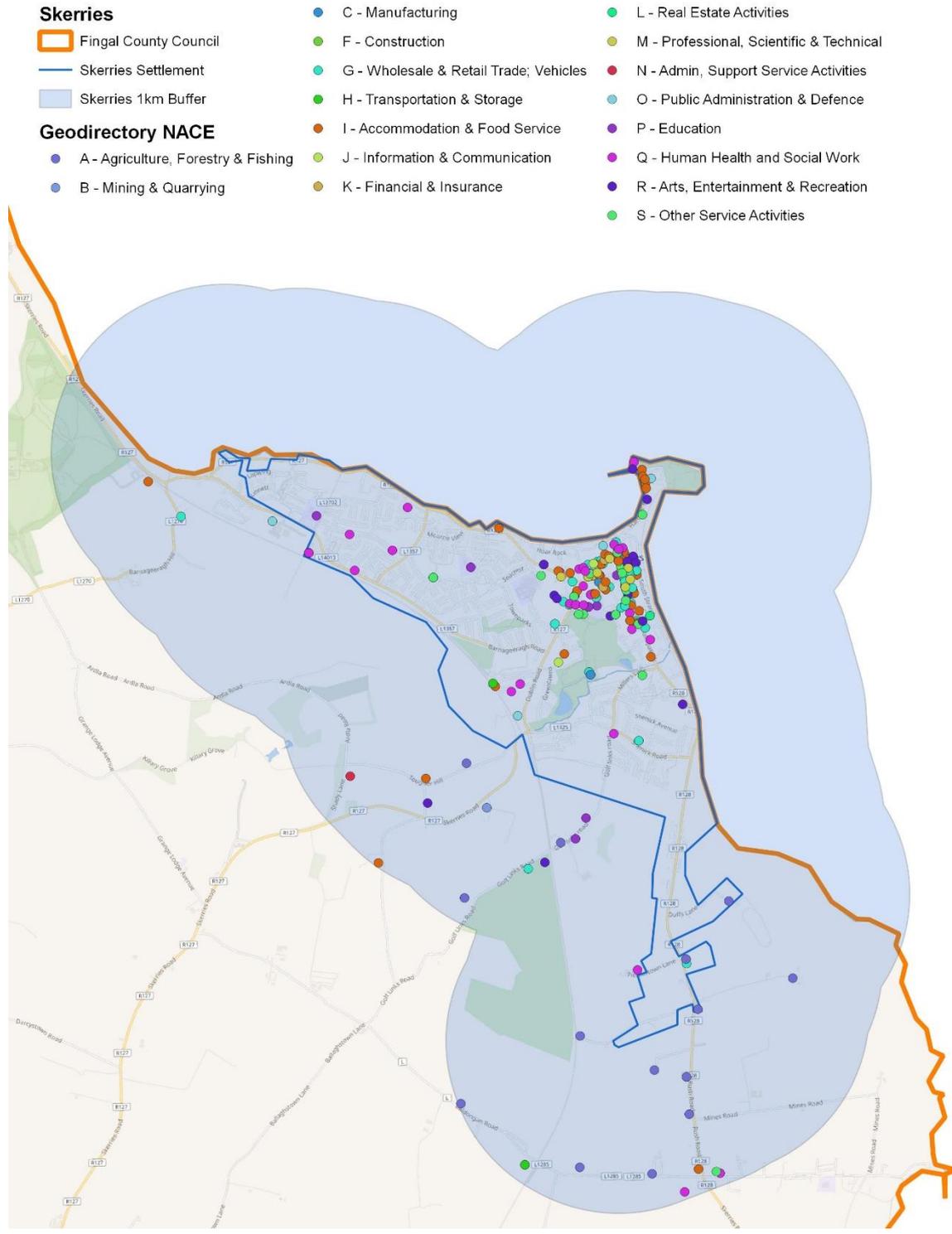


Figure 4-26 Businesses by NACE Activity in Skerries (GeoDirectory 2020 Q4)

## 4 Baseline Assessment

### 4.3.5 Commercial Vacancy

The following vacancy rates have been determined using commercial GeoDirectory data and is defined as vacant commercial addresses relative to the number of commercial addresses with NACE codes. This does not account for commercial units with no NACE code. The number of vacant units, total units and relative vacancy rate per settlement in Fingal are set out in Table 4-33 and are indicative of commercial health in each town as of the end of 2020.

The national vacancy rate as of 2020 Q4 according to the quarterly GeoView report<sup>14</sup> was 13.5% whereas the vacancy rate in Dublin was just 11.9%, lower than the GDA average vacancy rate of 12.0%. In absolute terms, the CMA has the largest count of vacant units in contrast to Baskin which has no vacant units. In relative terms Balbriggan has the highest vacancy rate at 17.8% whereas Portmarnock has a vacancy rate of just 3.8%. The overall vacancy rate for Fingal County Council was 13.0%, 0.5% lower than the national average yet 1.0% higher than the Dublin average. The distribution of vacant commercial units is illustrated in Figure 4-27.

Table 4-33 Commercial Vacancy Rates in Fingal County Council (Source: GeoDirectory 2020 Q4)

Settlement	Vacancy	Businesses	Vacancy Rate
Baskin	0	8	0.0%
Balbriggan	66	370	17.8%
Consolidated Metropolitan Area	465	3,560	13.1%
Donabate	13	89	14.6%
Lusk	8	73	11.0%
Malahide	30	345	8.7%
Portmarnock	5	130	3.8%
Rush	14	146	9.6%
Skerries	25	218	11.5%
Swords	138	805	17.1%
Remaining settlements and rural	152	1,285	11.8%
Total	916	7,029	13.0%

<sup>14</sup> GeoView Q4 2020 Report: <https://www.geodirectory.ie/knowledge-centre/reports-blogs/geoview-commercial-property-report-q4-2020>

## 4 Baseline Assessment

- Commercial Vacancy  
(Source: GeoDirectory 2020 Q4)
- Vacant Commercial Units
  - ▭ Fingal Settlements
  - ▭ Fingal County Council

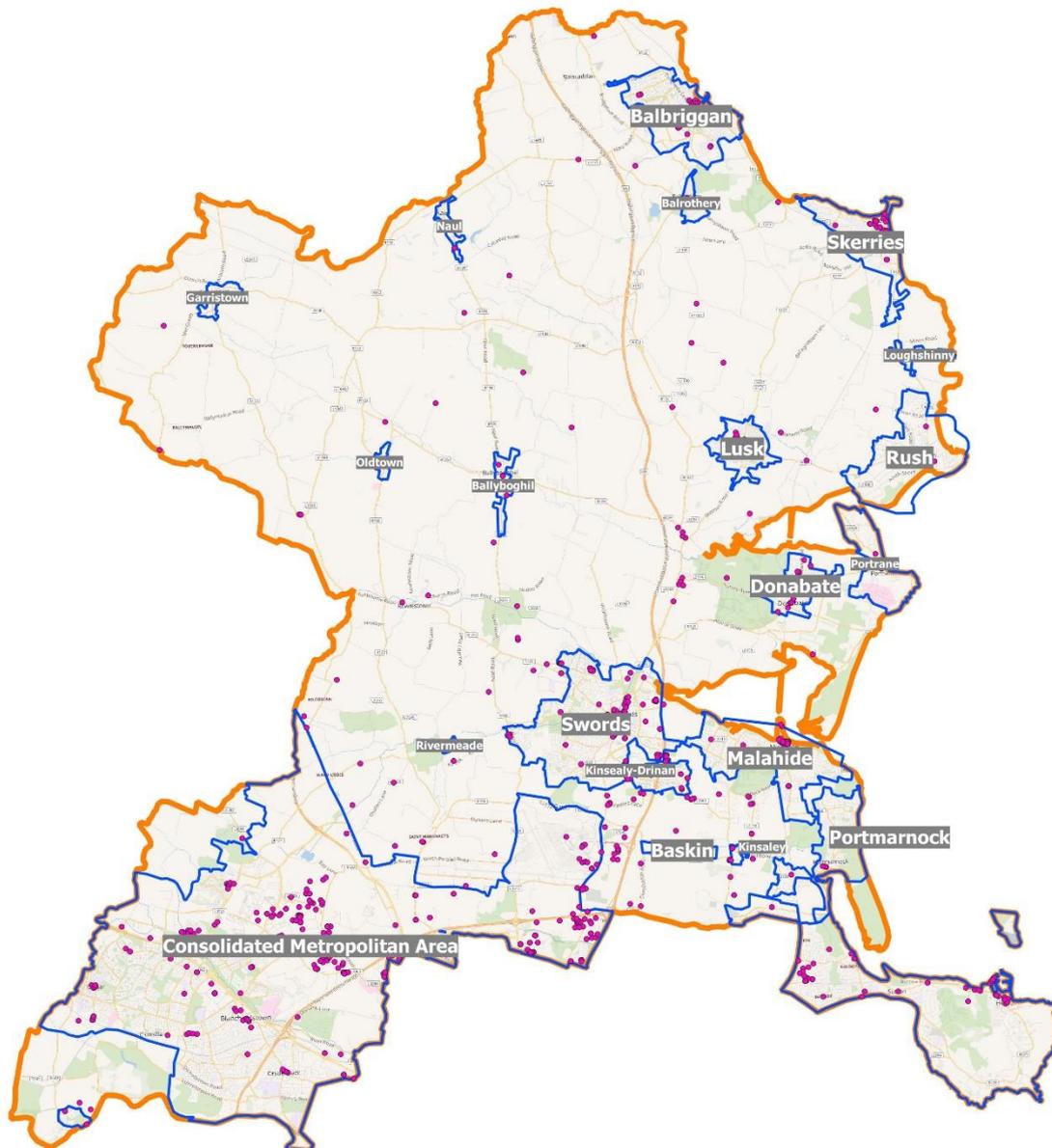


Figure 4-27 Vacant Commercial Units in Fingal County Council (Source: GeoDirectory 2020 Q4)

## 4 Baseline Assessment

### 4.4 Employment in Fingal

#### 4.4.1 [Introduction](#)

Economic flows often overlap local authority boundaries. This means that the functional area over which the local economy and its key markets operate will not necessarily adhere to administrative boundaries. Instead, key economic markets broadly correspond to sub-regions or city regions - known as functional economic market areas (FEMAs). The same can be observed for towns and the catchment of workers needed to support the local economy.

The POWSCAR database (Place of Work, School, College Census Anonymised Records) is a release from the Central Statistics Office used as part of this research to establish these FEMA areas. This dataset contains 2.78 million individual records of an individual's location of the place of work, school or college on the basis of the reply that was given to Question 34 on the census form: "What is the Full Name and Address of your place of work, school or college". Using this information, the CSO matched the employer/school name and address against addresses on the An Post GeoDirectory.

The final dataset is an origin-destination matrix that links the place of residence of the worker/student to their work/school/college destination of the worker/student. The dataset contains additional information about each work trip such as age, gender, industry of employment, education level, mode of transport, household occupancy status, one-off housing indicator, socio-economic group etc.

This assessment looks at the FEMAs (Functional Economic Market Areas) for Fingal as a county as well the economic areas related to each of the core settlements identified. In each case the FEMA can be reasonably defined as areas where in excess of 20% of the resident population commutes to that urban core to work in that county or settlement. A range of thresholds has been added to identify the levels of economic reliance across the county.

The geography of economic activity is increasingly complicated. People often live in one administrative area, work in a second, and they may travel to a third to do their weekly shopping or go to the cinema. At the same time, there is a distinctive functional geography which exists within administrative boundaries: smaller town centres have their own catchments, while highly localised patterns of service provision may be important for the well-being of individual neighbourhoods. For the business community, functional geographies rarely correspond to local government boundaries with the flows of knowledge,

## 4 Baseline Assessment

employment, and capital in and out of the county. Moreover, looking to the future in Fingal, there are examples where planned housing growth sited in one administrative area while the employment growth – which the new housing is intended to serve – is substantially located in another.

In 2016, there were 90,484 persons employed in Fingal County. 48.0% of these workers (43,440 persons) both live and work within the county, while 52.0% (47,044 persons) lived outside of Fingal County and commute in each day for employment. The largest concentration of this inbound workforce was from Dublin City with 19,578 or 41.6% of the total workforce that commutes into Fingal. A further 10,133 (21.5%) were commuting in from Meath, 4,799 (10.2%) from South Dublin, and the remaining 26.6% from the other counties in Ireland. Exactly 50.0% of this workforce commuting in, are working within the Dublin City and Suburbs area of Fingal which directly connects to Dublin City. In addition, 90.8% of resident workers in Fingal that leave the county for work commute to other Local Authorities in Dublin for employment with very small number commuting to the remainder of the country.

# 47,044

WORK INSIDE - LIVE OUTSIDE

Top 3 Origins for Workers in Fingal

Dublin City	19,578 persons (41.6%)
Meath County	10,133 persons (21.5%)
South Dublin County	4,799 persons (10.2%)

# 43,440

LIVE AND WORK IN THE AREA

Top 3 Destinations for Fingal Residents to Work

Dublin City	45,179 persons (75.5%)
South Dublin County	5,416 persons (9.0%)
Dun Laoghaire Rathdown	3,768 persons (6.3%)

# 59,871

LIVE INSIDE - WORK OUTSIDE

\*excludes mobile workers and those who work from home

## 4 Baseline Assessment

The map below looks at the draw of Fingal as an employment hub based on local areas (Electoral Division), where higher proportions of total workers in that local area commute to Fingal for employment. Areas in darker purple colours have higher proportions of a local workforce working in or commuting to Fingal for work. The analysis indicates that Fingal has a strong relationship with Meath, Dublin City and South Dublin in particular, having higher proportions of their working populations in employment in Fingal County.

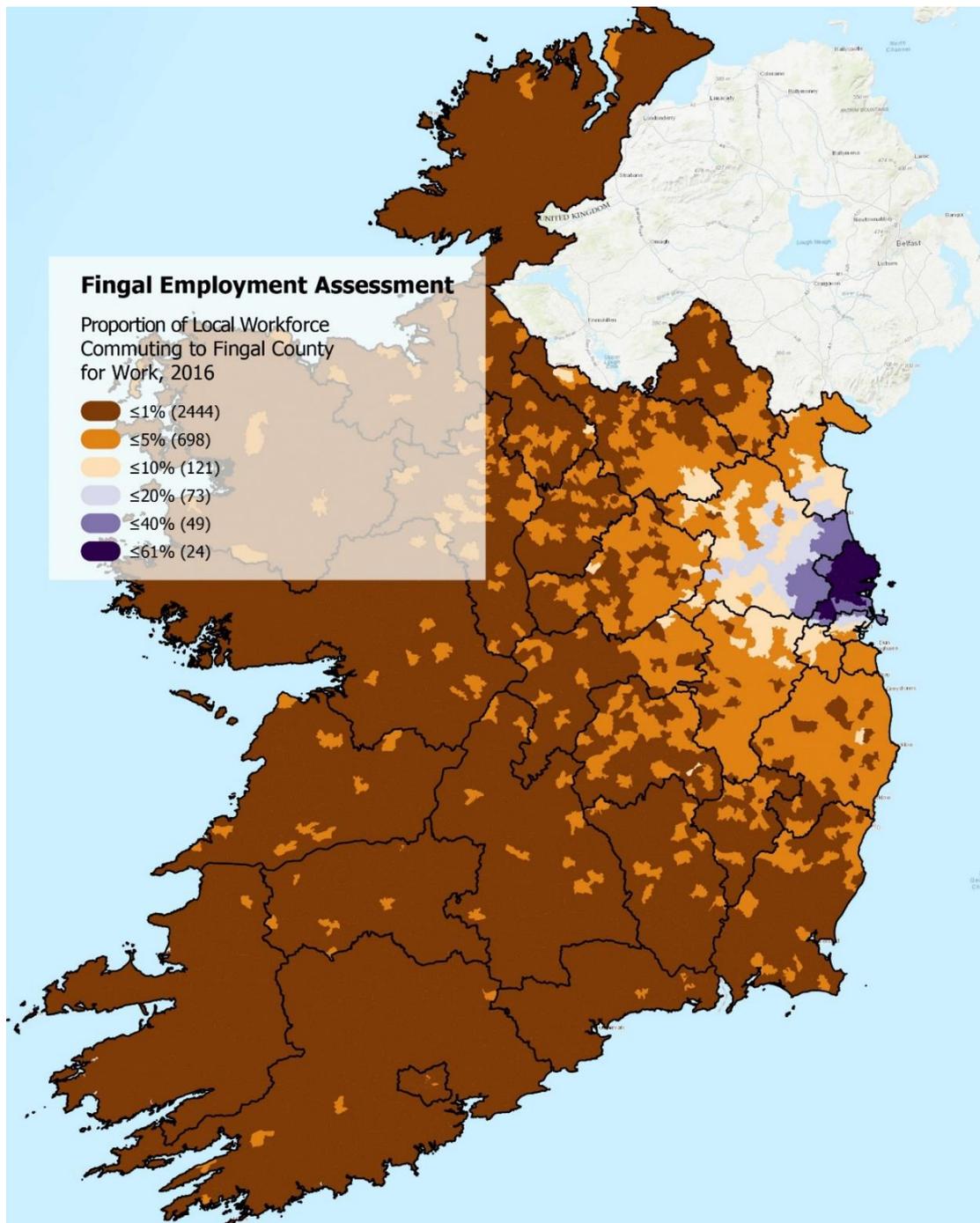


Figure 4-28 Fingal Employment Assessment - National Commuter Patterns (Source CSO POWSCAR 2016)

## 4 Baseline Assessment

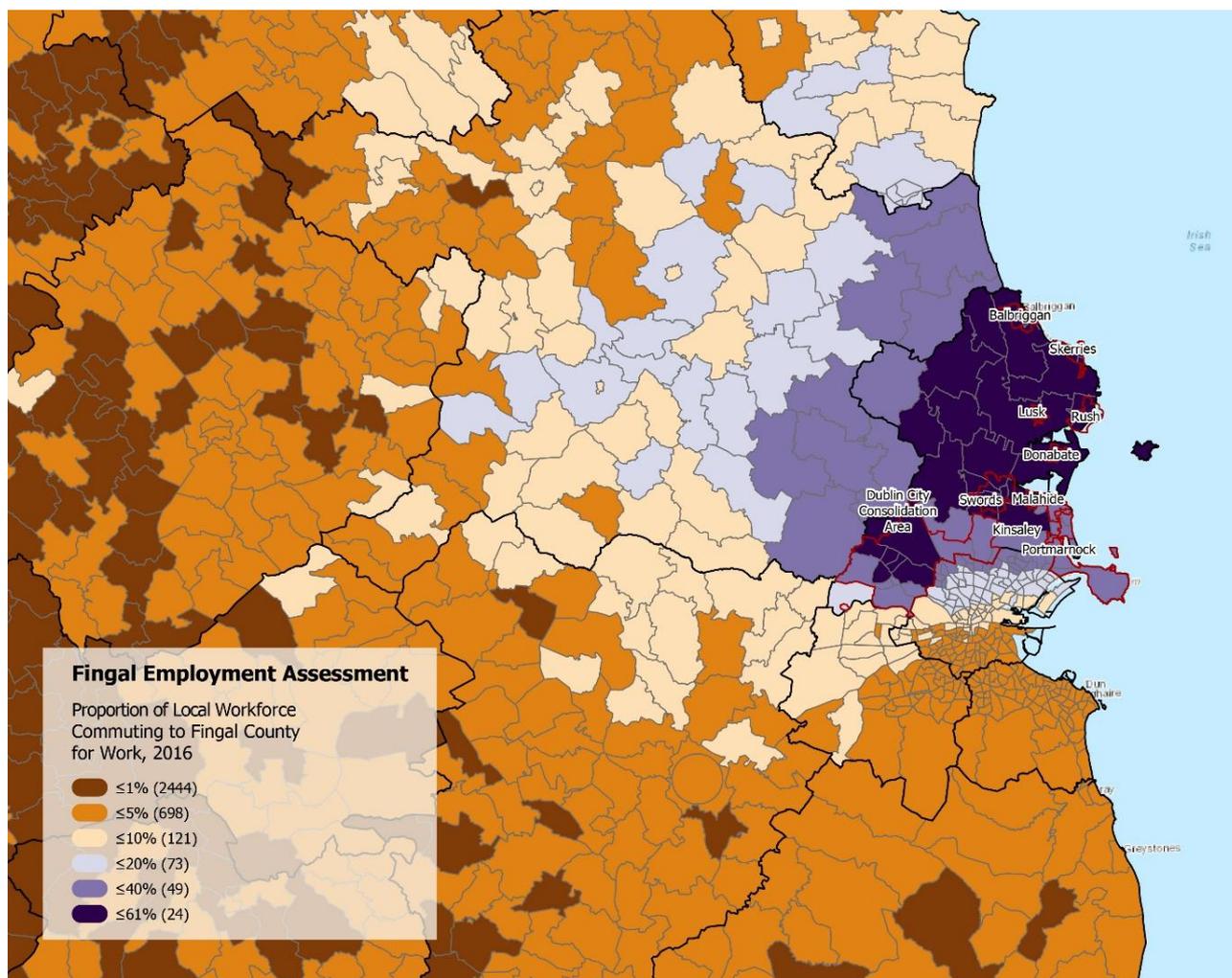


Figure 4-29 Fingal Employment Assessment - GDA Commuter Patterns (Source CSO POWSCAR 2016)

In 2016, there were 59,871 persons who lived in Fingal County but commuted outside of the county for employment each day. The largest concentration of this outbound workforce was to Dublin City with 45,179 or 75.5% of the total workforce that commutes from Fingal. A further 5,416 (9.0%) were commuting into South Dublin, 3,768 (6.3%) commuting to Dun Laoghaire Rathdown County, and the remaining 9.2% to the other counties in Ireland.

A further breakdown of these FEMA areas has been generated for the key settlement areas. This offers insights into the levels of employment-based commuting and the importance of individual settlements to the surrounding areas and to Fingal County.

## 4 Baseline Assessment

The large sectors of employment in the county are in Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities constituting 40.2% of all jobs, a further 20.3% in the Information and Communication, Financial, Real Estate, Professional, administration and support service sectors, and 16.9% in the Education, Human Health and Social Work Activities. Just 22.6% of jobs are within the remaining sectors of employment.

Table 4-34 Employment By Industry in Fingal (Source: CSO POWSCAR 2016)

Industry	Employees	% by Industry
Agriculture, forestry and fishing	753	0.8%
Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management	9,254	10.2%
Construction	2,732	3.0%
Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities	36,357	40.2%
Information and Communication, Financial, Real Estate, Professional, administration and support service activities	18,397	20.3%
Public Administration and Defence; Compulsory Social Security	3,816	4.2%
Education, Human Health and Social Work Activities	15,287	16.9%
Other Service Activities	3,258	3.6%
Not stated	630	0.7%
Total	90,484	

Table 4-35 shows a summary of existing employment across the county by sector. The majority of employment opportunity is located within the existing key settlements with just 26.4% (23,924 jobs) of employment occurring outside of the 8 identified settlements. The largest concentrations of employment within all sectors is within the Consolidation Area of Fingal adjoining Dublin City with 47% of all jobs in the county.

## 4 Baseline Assessment

Table 4-35 Employment in County by Sector

Area	1	2	3	4	5	6	7	8	*	Total Jobs
Balbriggan	16	357	96	962	357	325	975	160	23	3,271
Donabate	< 6	< 6	39	161	60	< 6	294	37	7	608
Lusk	56	8	8	170	22	11	181	31	< 6	489
Malahide	< 6	28	44	738	285	30	485	236	12	1,859
Portmarnock	< 6	13	32	275	61	8	272	91	8	762
Rush	93	9	34	310	63	< 6	302	66	14	892
Skerries	< 6	11	25	431	140	15	504	91	< 6	1,227
Swords	10	1,701	311	5,425	4,062	1,229	1,673	430	79	14,920
Consolidation Area	111	6,358	1,513	14,262	9,388	1,621	7,495	1,404	372	42,524
Baskin	-	-	< 6	< 6	-	-	< 6	< 6	-	8
<b>Total Key Settlements</b>	<b>286</b>	<b>8,485</b>	<b>2,102</b>	<b>22,734</b>	<b>14,438</b>	<b>3,239</b>	<b>12,181</b>	<b>2,546</b>	<b>515</b>	<b>66,560</b>
<b>Total Outside Key Settlements</b>	<b>467</b>	<b>769</b>	<b>630</b>	<b>13,623</b>	<b>3,959</b>	<b>577</b>	<b>3,106</b>	<b>712</b>	<b>115</b>	<b>23,924</b>
<b>Total Fingal</b>	<b>753</b>	<b>9,254</b>	<b>2,732</b>	<b>36,357</b>	<b>18,397</b>	<b>3,816</b>	<b>15,287</b>	<b>3,258</b>	<b>630</b>	<b>90,484</b>

#	Industry	#	Industry
1	Agriculture, forestry, and fishing	6	Public Administration and Defence; Compulsory Social Security
2	Manufacturing, mining, and quarrying, Electricity, Gas, Water supply and Waste Management	7	Education, Human Health and Social Work Activities
3	Construction	8	Other Service Activities
4	Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities	9	Not stated
5	Information and Communication, Financial, Real Estate, Professional, Administration and Support Service Activities	-	-

## 4 Baseline Assessment

### 4.4.2 Functional economic areas (FEA)

Fingal has a wide Functional Economic Market Area pulling in workers from around the country. Sub-county these workers are travelling to a number of key employment hubs. The mapping outputs below provide the FEMA areas for each individual key settlement in the county. Table 4-36 provides a summary of the breakdown in reach for each key settlement sorted by the level of interaction. The first column on the left indicating the county of origin, with the remaining columns indicating the proportion of workers in each settlement commuting from that county.

In most instances the economic reach is minimal beyond Fingal County and the majority of employment opportunity is taken up by local populations. Swords and the CMA catchment areas are the exception to this trend.

Table 4-36 Origin county of commuters working in key settlements across Fingal (Source CSO POWSCAR 2016)

	Balbriggan	Donabate	Lusk	Malahide	Portmarnock	Rush	Skerries	Swords	DCS	Total Fingal
Fingal	65.6%	71.5%	83.2%	70.3%	69.6%	86.1%	81.7%	53.0%	41.9%	48.0%
Dublin City	7.8%	12.5%	5.3%	17.7%	21.9%	4.6%	6.6%	19.1%	25.8%	21.6%
Meath	13.1%	6.7%	6.1%	4.8%	3.7%	4.0%	5.9%	8.3%	11.5%	11.2%
South Dublin	1.3%	1.8%	1.2%	1.5%	1.0%	1.3%	0.8%	4.1%	6.6%	5.3%
Kildare	0.7%	0.8%	0.0%	1.0%	0.5%	0.3%	0.4%	2.8%	4.7%	3.7%
Louth	8.3%	3.1%	3.3%	1.9%	1.3%	1.6%	3.3%	4.6%	1.6%	2.9%
Dún Laoghaire	0.9%	1.2%	0.4%	0.9%	0.7%	0.3%	0.5%	2.1%	2.7%	2.3%
Wicklow	0.2%	0.5%	0.0%	0.2%	0.5%	0.3%	0.1%	0.8%	1.1%	0.9%
Cavan	0.2%	0.0%	0.2%	0.2%	0.0%	0.3%	0.1%	0.4%	0.7%	0.5%
Westmeath	0.2%	0.2%	0.0%	0.1%	0.1%	0.2%	0.2%	0.3%	0.5%	0.5%
Laois	0.1%	0.0%	0.0%	0.3%	0.0%	0.1%	0.0%	0.3%	0.4%	0.3%
Cork County	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%	0.1%	0.6%	0.3%	0.3%
Wexford	0.1%	0.3%	0.0%	0.1%	0.0%	0.1%	0.1%	0.3%	0.3%	0.3%

## 4 Baseline Assessment

	Balbriggan	Donabate	Lusk	Malahide	Portmarnock	Rush	Skerries	Swords	DCS	Total Fingal
Offaly	0.1%	0.2%	0.0%	0.1%	0.0%	0.0%	0.0%	0.3%	0.3%	0.2%
Monaghan	0.5%	0.0%	0.2%	0.1%	0.0%	0.2%	0.1%	0.3%	0.2%	0.2%
Limerick City/County	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%	0.3%	0.1%	0.2%
Galway County	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.2%	0.2%
Carlow	0.0%	0.3%	0.0%	0.1%	0.0%	0.0%	0.0%	0.2%	0.2%	0.1%
Tipperary	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.2%	0.1%	0.1%
Clare	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%	0.1%
Kilkenny	0.1%	0.2%	0.0%	0.1%	0.1%	0.0%	0.0%	0.1%	0.1%	0.1%
Roscommon	0.0%	0.2%	0.0%	0.1%	0.0%	0.1%	0.1%	0.2%	0.1%	0.1%
Cork City	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.3%	0.1%	0.1%
Mayo	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%	0.1%
Donegal	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%	0.1%	0.1%
Longford	0.0%	0.3%	0.0%	0.1%	0.1%	0.0%	0.1%	0.1%	0.1%	0.1%
Waterford City/County	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.1%	0.1%	0.1%
Kerry	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.2%	0.1%	0.1%
Sligo	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.1%	0.1%	0.1%
Galway City	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
Leitrim	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%

## 4 Baseline Assessment

### 4.4.2.1 Consolidated Metropolitan Area (Dublin City and Suburbs)

The CMA (including Swords, Blanchardstown, Baldoyle etc.) contains the largest number of jobs in the county and has a significant functional economic area with large proportions of the immediately contiguous local area commuting to work in the catchment. The CMA is a significant employer for County Meath with notable concentrations of local workforces coming from Dunboyne and Dunshaughlin. In total, 4,666 persons commute to work in the CMA from Meath and constitute 11.5% of the total local employment in CMA.

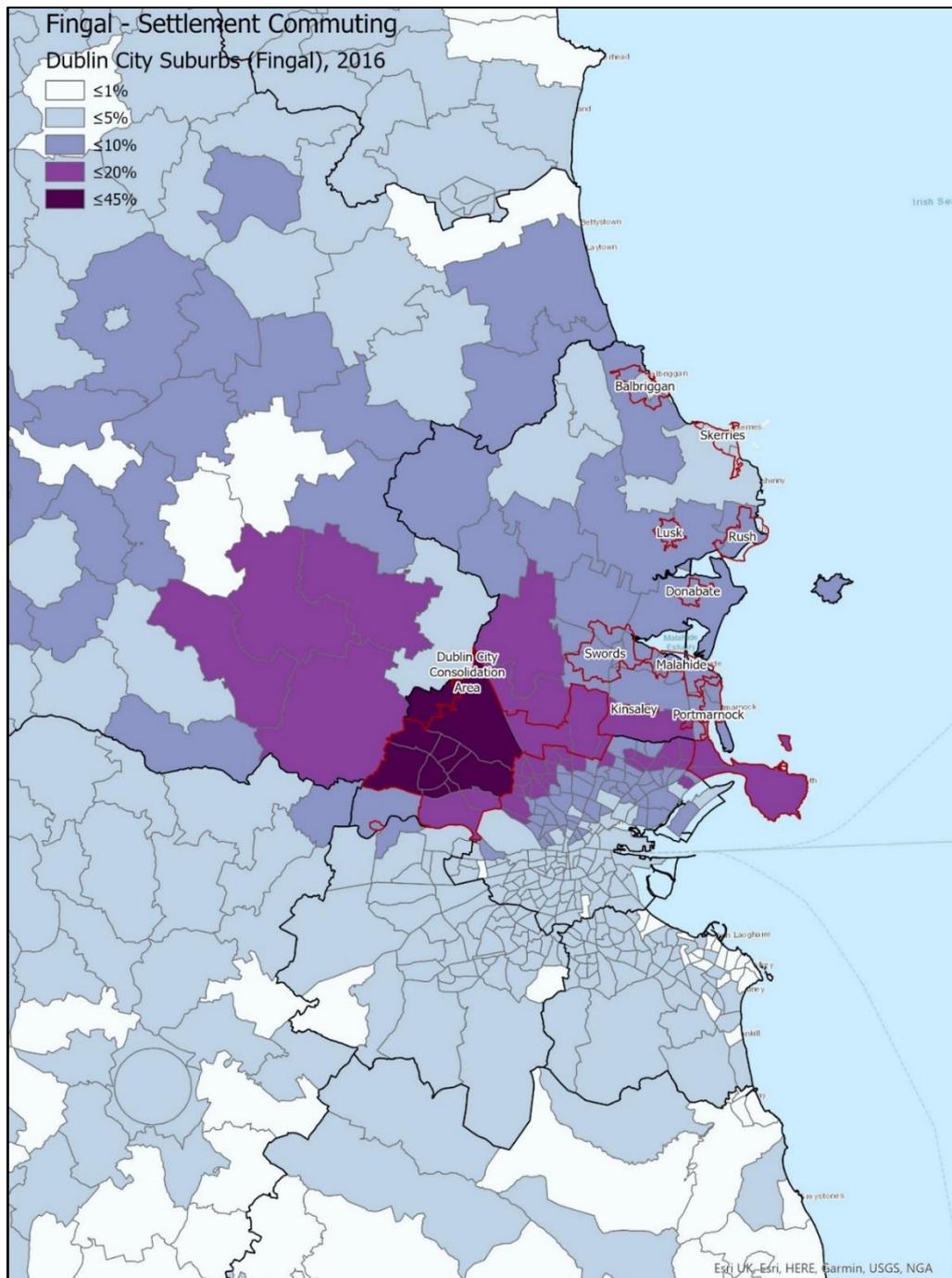


Figure 4-30 Dublin City and Suburbs Commuter Patterns (Source CSO POWSCAR 2016)

## 4 Baseline Assessment

### 4.4.2.2 Swords

Swords has the second highest concentration of workers commuting to the settlement for work in the county. A large proportion of workers living within the settlement work locally (<35%). Swords attracts up to 20% of resident workers in neighbouring areas in the north surrounding Lusk, in the west and in the east toward Malahide. 19.1% of workers commute in from Dublin City with a further 8.3% coming from Meath. The majority of Fingal has upwards of 5% of the working population commuting to Swords. The settlement has 14,920 local jobs and a diverse sectoral breakdown of employment.

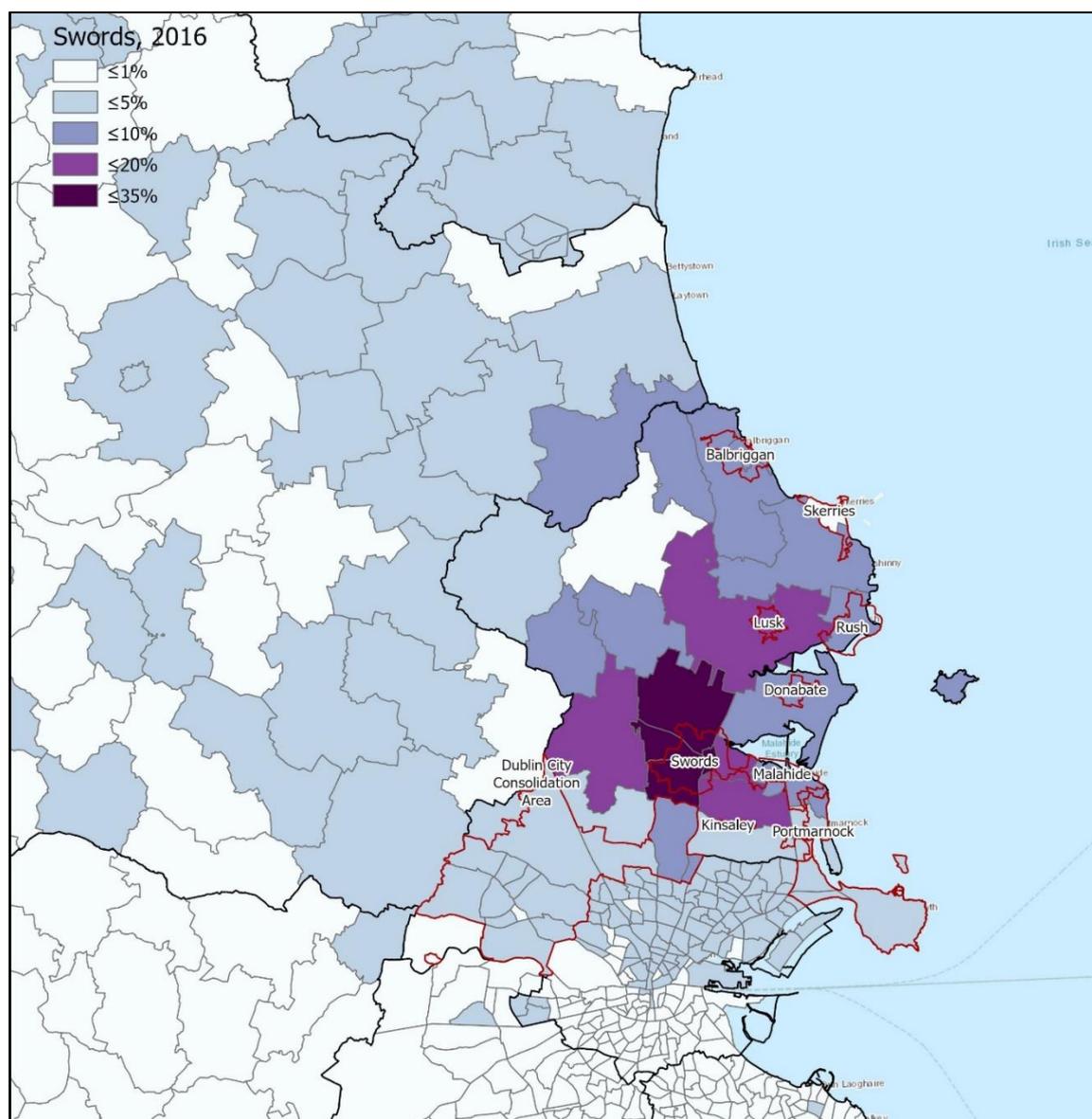


Figure 4-31 Swords Commuter Patterns (Source CSO POWSCAR 2016)

## 4 Baseline Assessment

### 4.4.2.3 Portmarnock

The FEMA area for Portmarnock is relatively small with no significant reach beyond the settlement itself. Portmarnock has 762 jobs which are primarily in Wholesale and Retail or Health and Education sectors. A significant amount of the town's employment is local, but data indicates 21.9% of jobs in the town originate are staffed by Dublin City residents. Malahide and Kinsealy are the only spatial areas that demonstrate moderate economic reliance on Portmarnock (<5%).

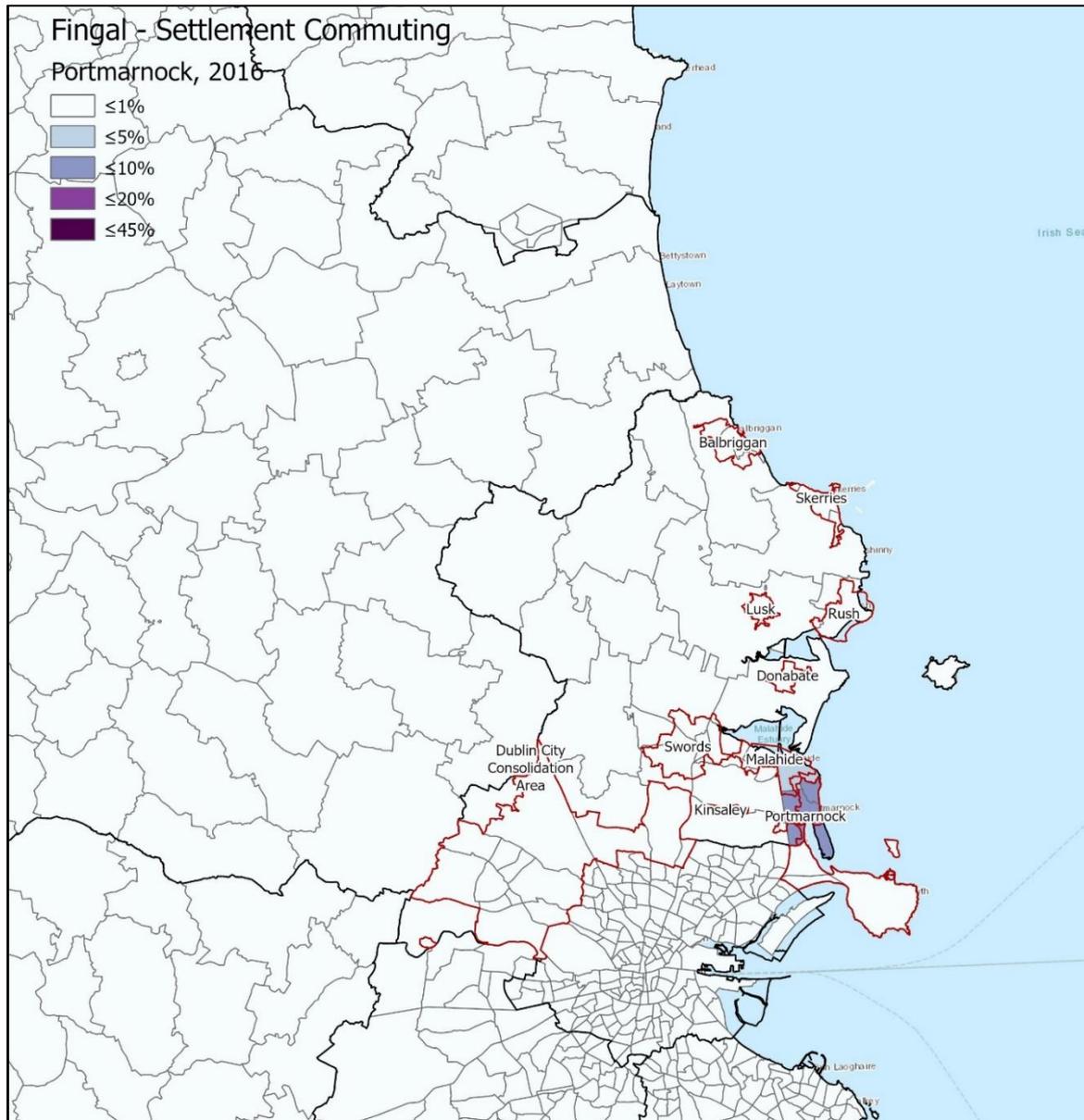


Figure 4-32 Portmarnock Commuter Patterns (Source CSO POWSCAR 2016)

## 4 Baseline Assessment

### 4.4.2.4 Baskin

Baskin has almost no notable reach in terms with commuter flow given the small scale of the settlement and low number of enterprises. Due to statistical disclosure requirements there are no clear areas where commuters originate. In 2016 there were 8 persons working in the settlement.



Figure 4-33 Baskin Commuter Patterns (Source CSO POWSCAR 2016)

## 4 Baseline Assessment

### 4.4.2.5 Donabate

Donabate is a relatively small settlement with no significant FEMA reach beyond the settlement itself. Donabate has 608 jobs which are primarily in Wholesale and Retail or Health and Education sectors. A significant amount of the town's employment is local, but data indicates 12.5% of workers in the town come from Dublin City and a further 6.7% from Meath. Much of the local workforce originate within Donabate with no significant inflows of workers from any other part of the country.

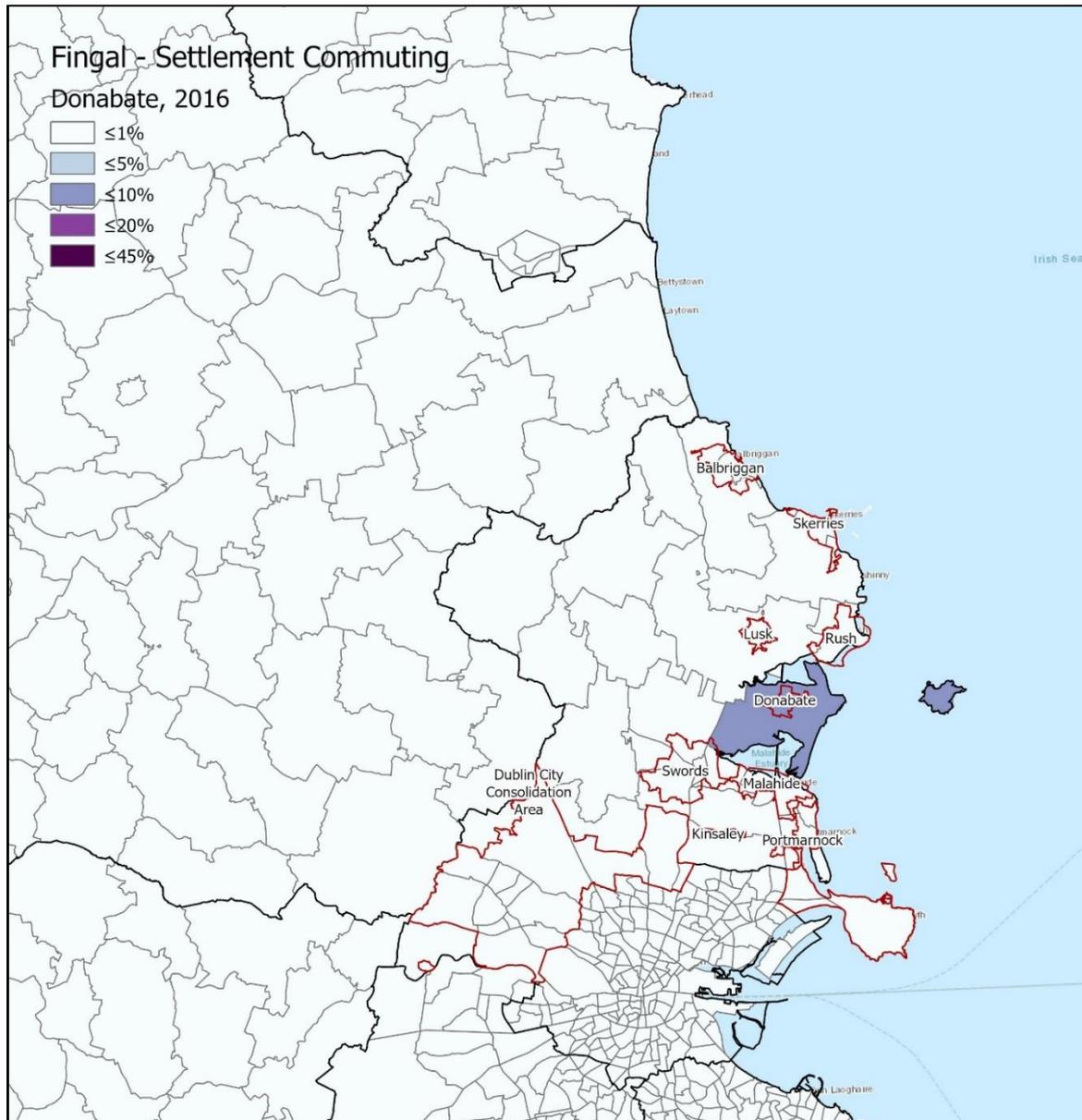


Figure 4-34 Donabate Commuter Patterns (Source CSO POWSCAR 2016)

## 4 Baseline Assessment

### 4.4.2.6 Malahide

Malahide is a comparably larger employer for the area providing 1,859 local jobs. Data indicates that 17.7% of workers in the town come from Dublin City and a further 4.8% from Meath. Residents of Fingal County occupy the majority of employment in the town with the settlement demonstrating that the surrounding areas of Donabate, Swords and Portmarnock have a moderate economic reliance on Malahide (<5%). The settlement also has a more diverse sectoral breakdown with 285 (15.3%) of workers in the ICT and Financial Services sectors.

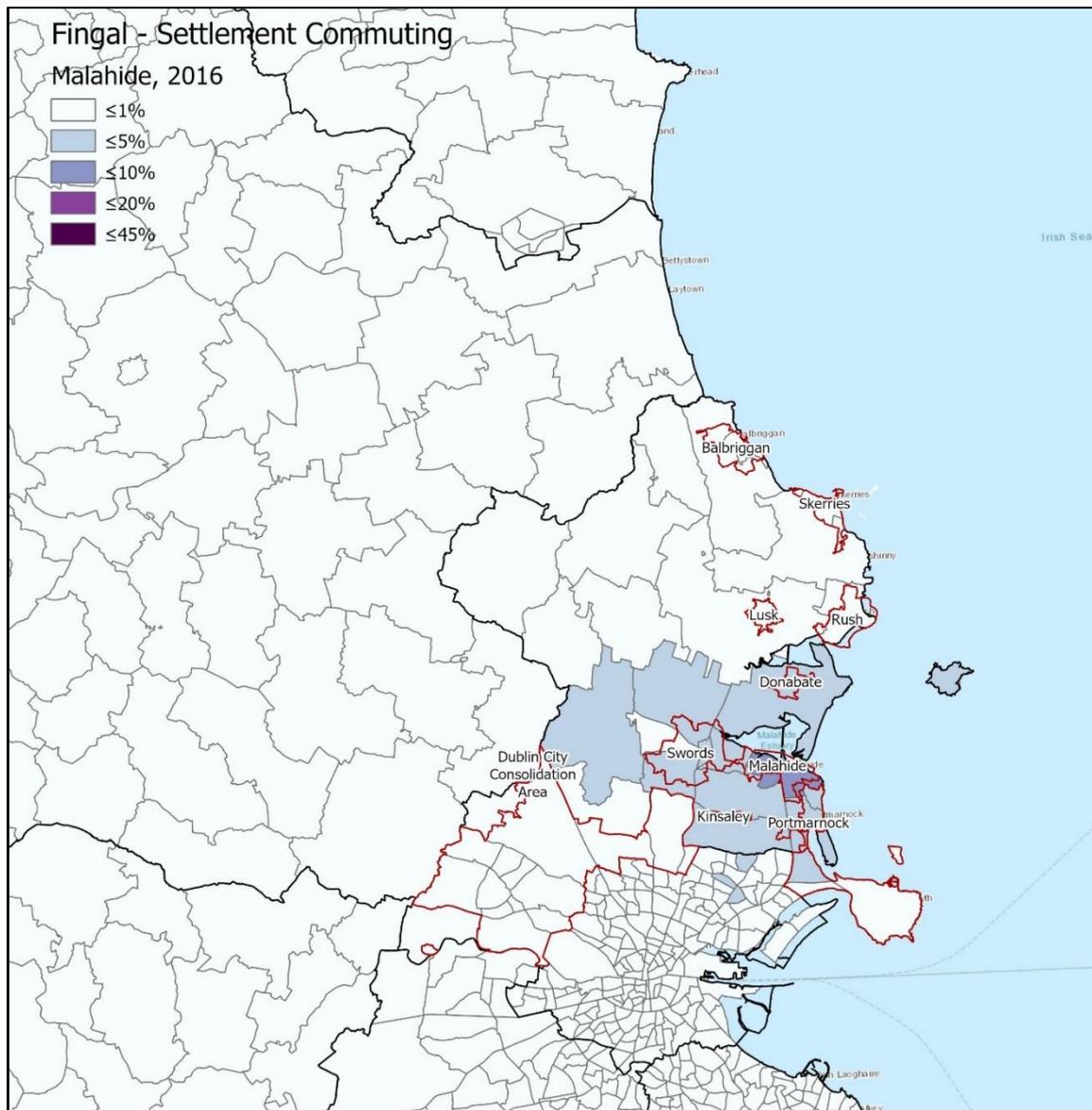


Figure 4-35 Malahide Commuter Patterns (Source CSO POWSCAR 2016)

## 4 Baseline Assessment

### 4.4.2.7 Balbriggan

Balbriggan has the third highest concentration of workers commuting to the settlement for work and has 3,271 persons employed in the town. Given its location in north Fingal its unsurprising that 8.3% of employment in the town comes from Louth residents. A further 13.1% of workers in the town come from Dublin City and a further 7.8% from Meath. The settlement is a hub for local employment (Fingal residents) has a diverse sectoral breakdown base of industry with strong levels of employment in Manufacturing and ICT and Financial services sectors.

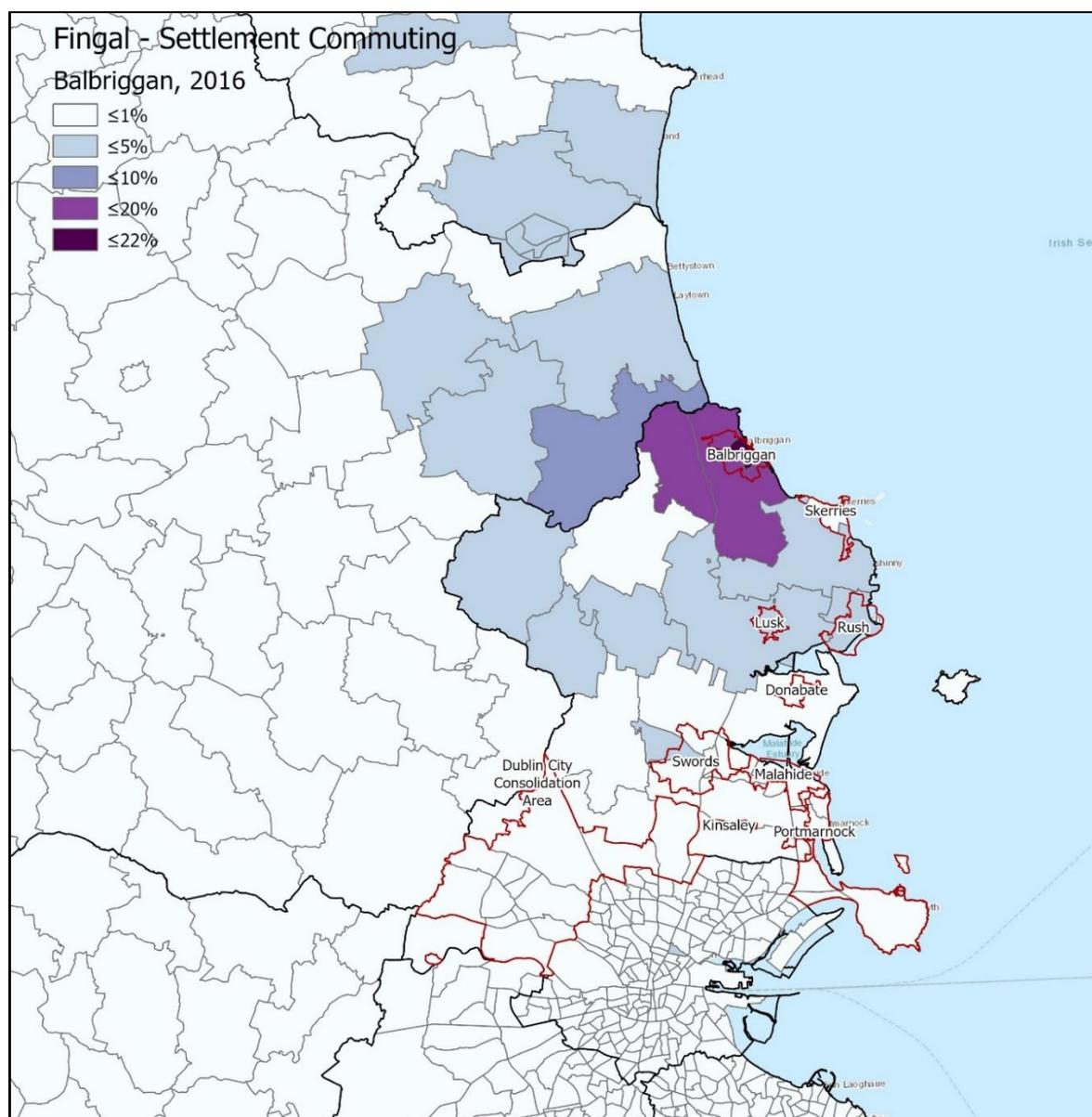


Figure 4-36 Balbriggan Commuter Patterns (Source CSO POWSCAR 2016)

## 4 Baseline Assessment

### 4.4.2.8 Lusk

Lusk is a relatively small settlement with no significant FEMA reach beyond the settlement itself. Lusk has 489 jobs which are primarily in Wholesale and Retail or Health and Education sectors. A significant amount of the town's employment is local with 83.2% of all jobs occupied by Fingal residents. A large amount of the local workforce originates within Lusk with no significant inflows of workers from any other part of the country apart from Rush (<5%).

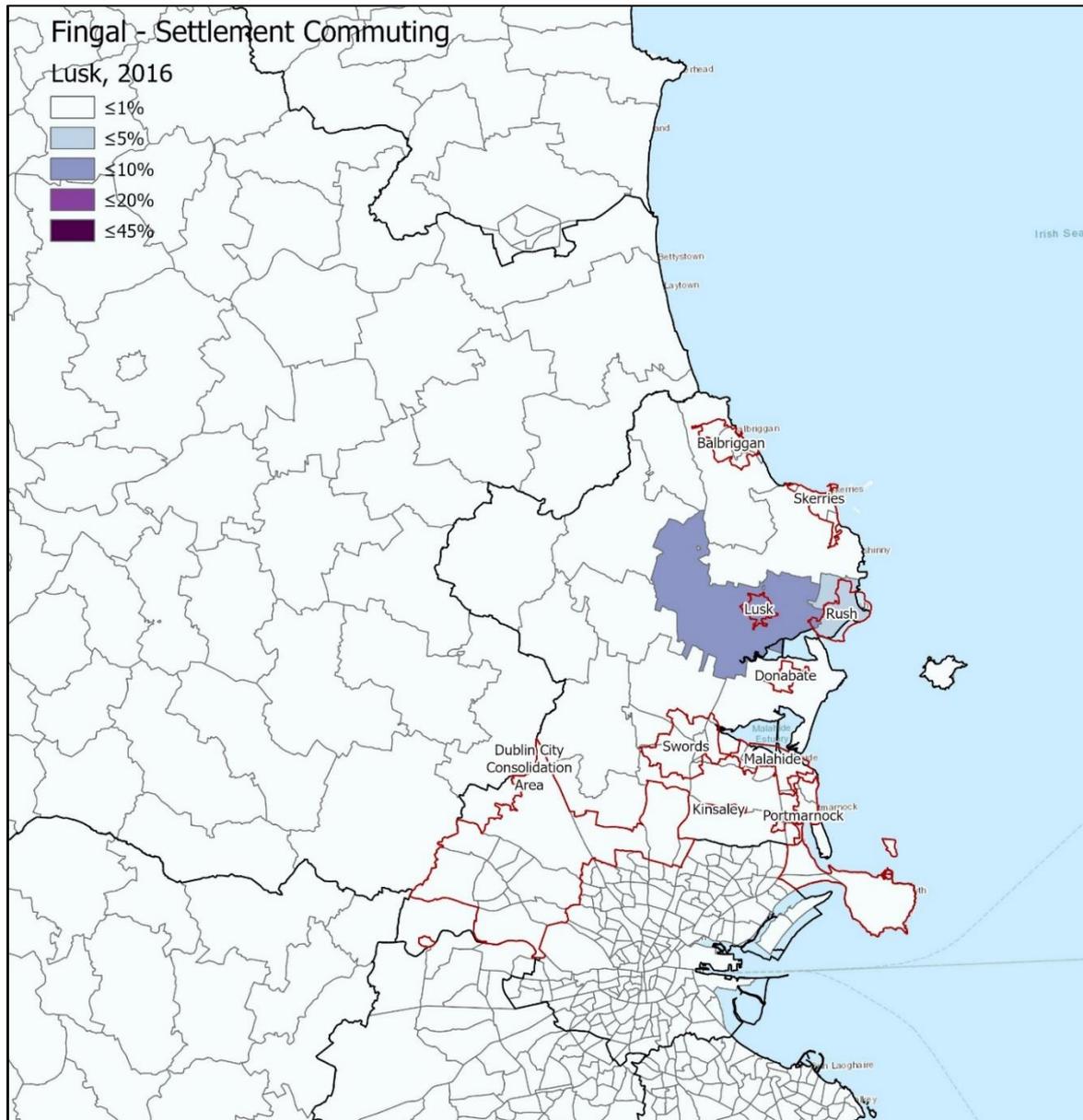


Figure 4-37 Lusk Commuter Patterns (Source CSO POWSCAR 2016)

## 4 Baseline Assessment

### 4.4.2.9 Rush

Rush is a relatively small settlement with no significant FEMA reach beyond the settlement itself. Rush has 892 jobs which are primarily in Wholesale and Retail or Health and Education sectors. A significant amount of the town's employment is local with 86.1% of all jobs occupied by Fingal residents. A large amount of the local workforce originates within Rush with no significant inflows of workers from any other part of the country apart from Lusk and the Skerries hinterland (<5%).

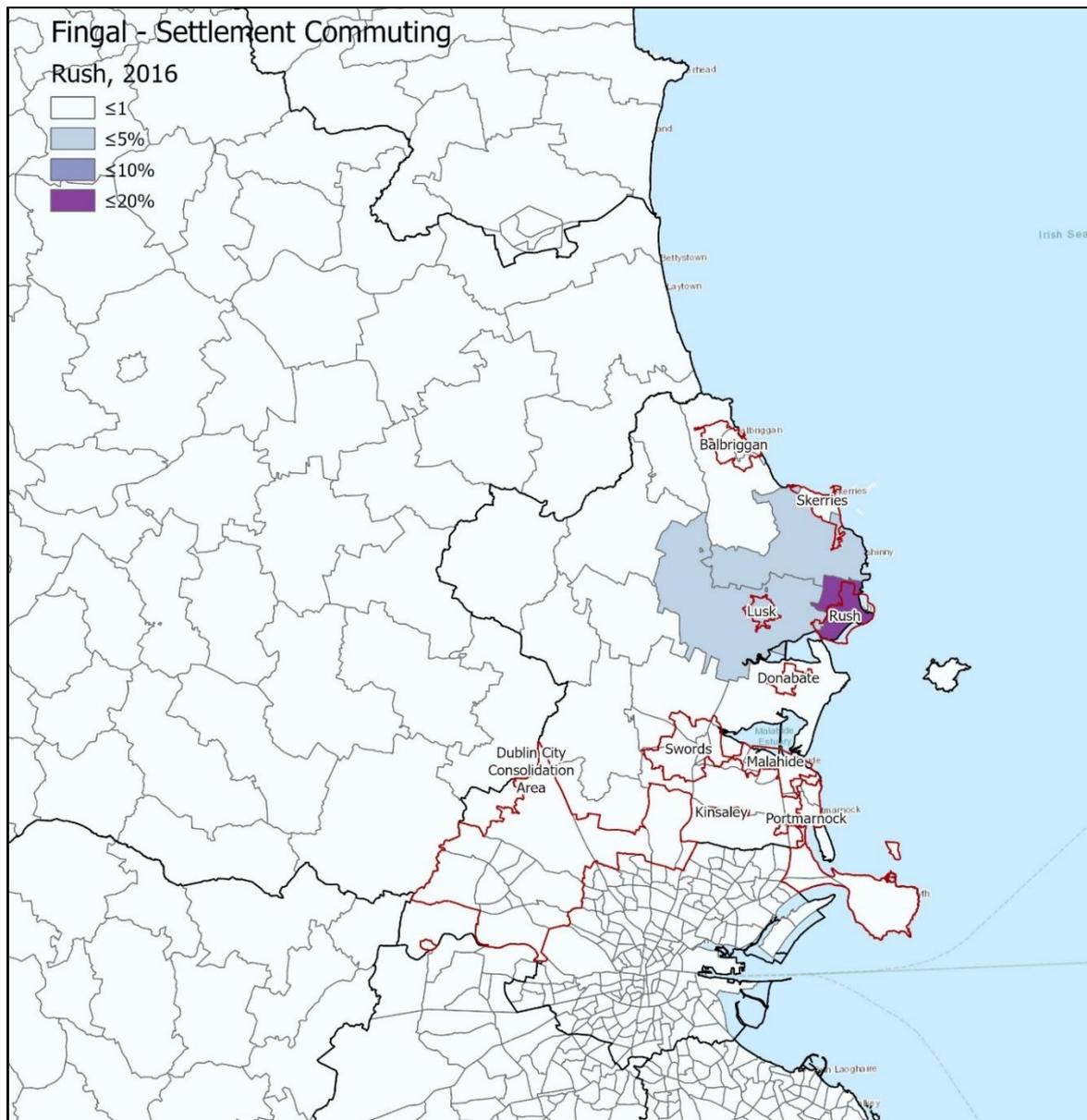


Figure 4-38 Rush Commuter Patterns (Source CSO POWSCAR 2016)

## 4 Baseline Assessment

### 4.4.2.10 Skerries

Skerries is a larger settlement with no significant FEMA reach beyond the settlement itself and some surrounding settlements in north Fingal (e.g. Balbriggan, Lusk and Rush). Skerries has 1,227 jobs which are primarily in Wholesale and Retail or Health and Education sectors. A significant amount of the town's employment is local with 81.7% of all jobs occupied by Fingal residents. Interestingly, the FEMA area for Skerries does not include the core of the town, indicating that a large quantum of the working population commutes out of Skerries for employment.

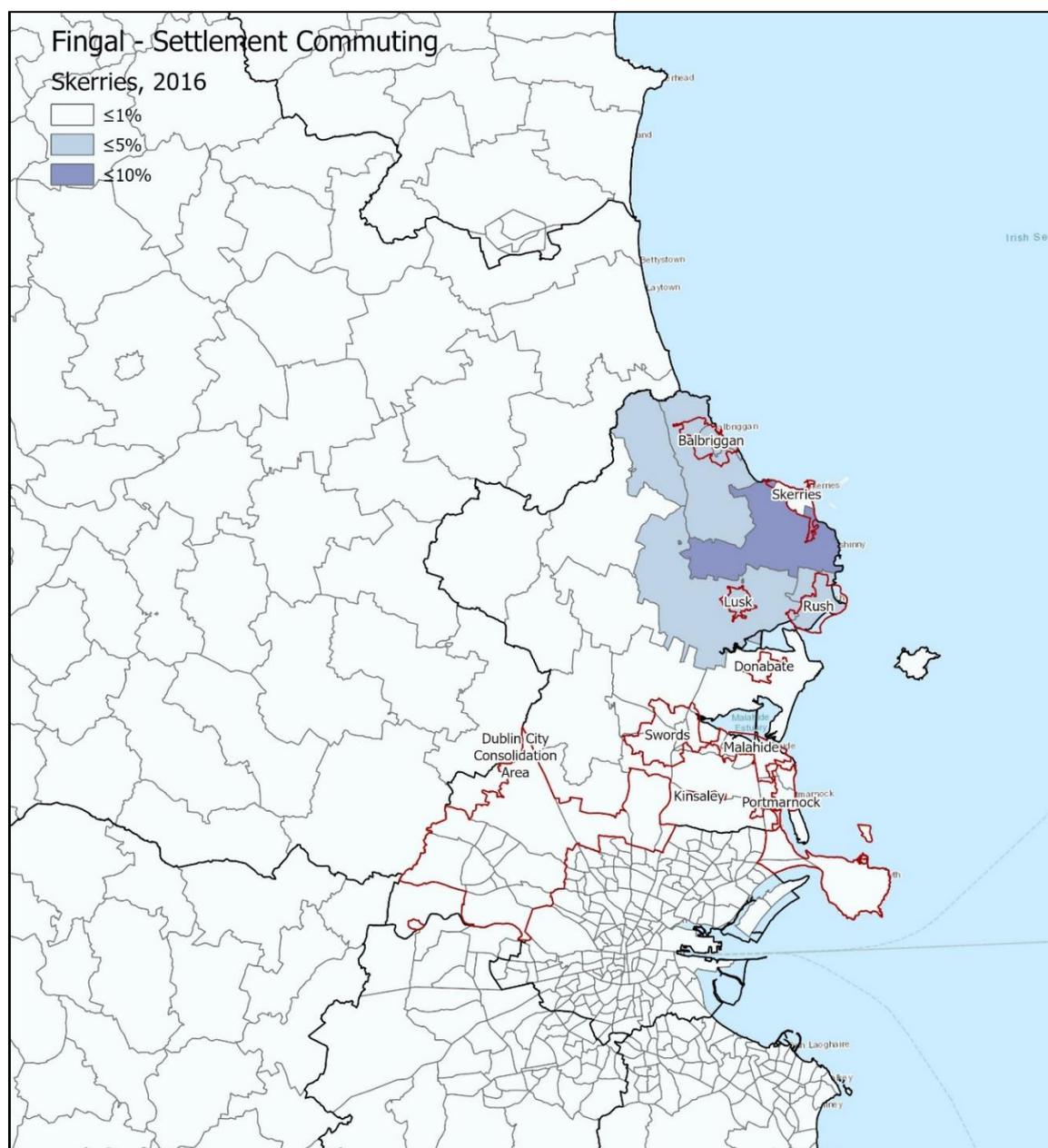


Figure 4-39 Skerries Commuter Patterns (Source CSO POWSCAR 2016)

## 5 Sectoral Review Summaries

### 5 Sectoral Review Summaries

Global trends (where relevant), national trends, and a regional and local overview comprising employment, enterprise and local development have been explored for the following sectors:

- The agricultural and agri-food sectors
- Manufacturing
- ICT and Financial Services
- Pharmaceutical and Healthcare
- Retail
- Tourism
- Aviation
- Marine
- Green Economy
- Rural Economy

These key sectors have been identified in the Fingal Skills Strategy (2020) and identified as having importance to the local economy as explored through enterprise and employment analyses.

## 5 Sectoral Review Summaries

### 5.1 The Agricultural and Agri-food Sectors

This section provides a sectoral summary of agricultural and agri-food sectors given the close relationship between the industries in terms of the production and output chain.

#### 5.1.1 [Global and National Overview](#)

The EU-27's agricultural industry created gross value added of €176.4 billion in 2019, contributed 1.3 % to the EU-27's GDP. Agricultural income per annual work unit was 4.7 % higher for the EU-27 in 2019 than the level in 2018 and +19.7 % higher than in 2010.

Agricultural production in the EU is comprised of millions of predominantly small farms that constitute a large and growing part of the Unions GVA, even without considering its importance as the key building block for the downstream food and beverage processing industry. The value of everything that the EU's agricultural industry produced in 2019 was an estimated €418.0 billion; this includes the value of crops, of animals, of agricultural services, as well as some goods and services that were not strictly agricultural, but which could not be separately measured.

About one half (52.8 %) of the value of the total output of the EU's agricultural industry in 2019 came from crops (€220.5 billion), within which vegetables and horticultural plants and cereals were the most valuable crops. About two fifths (38.6 %) of total output came from animals and animal products (€161.4 billion), a majority coming from just milk and pigs. Agricultural services (€20.0 billion) and inseparable non-agricultural activities (€16.0 billion) contributed the rest (8.6 %).

The volume of agricultural labour declined sharply in almost all Member States during the period between 2005 and 2019; the sharpest declines were in Bulgaria (an average -8.2 % per year) and Slovakia (-5.5 % per year). This contraction in the agricultural labour force reflected both push and pull factors; there have been great strides in mechanisation and efficiency on the one hand and, on the other, a wider choice of attractive job opportunities in other sectors of the economy. The main exceptions to this general trend were Malta (+1.6 % per year on average) and Ireland (+0.6 % per year on average).

The agri-food sector is one of the largest indigenous manufacturing industries in Ireland employing 164,400 persons nationally in 2019 (7.1% of total employment).

## 5 Sectoral Review Summaries

The sector accounts for €14.4 billion in Gross Value Added (GVA) to the national economy (4.1% of total GVA). The total value of exports in 2019 was €14.5 billion and accounted for 9.5% of Irish merchandising exports. The majority of these exports are in either Cattle (31.2% of total) or Milk (37.7%) exports.

In Ireland, Teagasc report that the industry (2016) is comprised primarily of agriculture, forestry and fishing (63%), food (30%), beverages (3%) and wood processing (2%).

There are 589 SMEs in the agri-food sectors in 2016 according to the CSO. Teagasc reported (2016) there are near 700 food and drink firms in Ireland at present. These firms account for 8.5% of national employment.

The Irish Farmers Association provide economic metrics<sup>15</sup> (2016) for the importance of the agricultural and agri-food industry in Dublin stating that there are 810 farms in the county at an average size of 47.6 hectares. The total farmed land area is 38,576 hectares with 1,190 full time equivalent (FTE) jobs associated. The approximate value of output from this area was €140m, rising to €205m in export value.

The GDA has the highest median price per acre in Ireland (CSO agricultural land prices 2019) at €10,117. This is over double the price in the north western region (€4,905).

### 5.1.2 Fingal Overview

Given that a majority of agricultural enterprises are located rurally, there are low job densities for this industry. There are 753 people employed in Fingal (by working location sourced from POWSCAR) accounting for 0.8% of those employed. 62% of agricultural workers are employed outside of the key settlements equating to 467 jobs.

Fingal County has a relatively small number proportion of the resident population working in Agriculture, Fishing and Forestry sectors. In 2016, the county had just 1,193 persons active and working in the industry which accounted for just 0.9% of the total resident working population.

Agriculture and Agri-food are not significant employers to the county at present, but the industry is still underdeveloped. The quantum of agricultural land available and favourable zonings for the sector create significant potential opportunity to grow the sector and its employment base into the future.

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<sup>15</sup> <https://www.ifa.ie/wp-content/uploads/2020/06/Dublin.pdf>

## 5 Sectoral Review Summaries

Where NACE codes do not broadly differentiate between the agriculture and agri-food sectors, a manual reclassification exercise has been processed on the basis of detailed NACE subcategory as defined by the industry description. Notably enterprises directly classified as agricultural are located outside of settlements whereas those associated with agri-food are located within settlements or in close proximity.

### **Agriculture**

There are 403 enterprises within the GeoDirectory dataset (2020 Q4) which can be categorised as agricultural of which a majority are located outside of settlements (82.9%) with those within settlements being located in the CMA (6.2%) and Rush (2.2%). The activities of such enterprises are described by NACE activity and range from crop and animal production to mixed farming.

### **Agri-food**

There are 52 enterprises within the GeoDirectory dataset (2020 Q4) which can be categorised as agri-food and manufacturing of which a majority are located within settlements (87%) with the remaining outside of settlements being defined as rural. The majority of these enterprises are located within the CMA (63.5%) ranging from production of beer to manufacturing of bread and pastries in activity.

Fingal County Council, through the Local Enterprise Office, is delivering a wide range of financial and non-financial supports to agri-food companies in the county. The Agri-Food Strategy for Fingal builds upon this work and sets out a common framework that will foster innovation and collaboration across the sectors, increasing value added, leading to further jobs creation in the agri-food sector and maximizing the potential of the agri-food base in the county. Fingal County Council developed the strategy with the input of a steering group of local sectoral experts.

## 5 Sectoral Review Summaries

### 5.2 Manufacturing Sector

#### 5.2.1 Global and National Overview

Manufacturing is a core component of any economy. Manufacturing is varied and involves a variety of competencies and skills and is a focal point for evolution. In advanced developed economies manufacturing is seeing a transformation with technological research and advancements. The *'Making it in Ireland: Manufacturing 2020'* report by Forfás refers to manufacturing as a critical component of Irelands economy in order to become a sustainable exporter. Manufacturing provides employment to a wide employment base with varied skills, exports have grown significantly and are a source of GDP growth, there has been increased productivity and the sector is a research and development driver.

The IDA attracts investment for advanced manufacturing in Ireland and cites globalisation and innovation in Ireland making it a 'strategic hub' again referring to Irelands track record for engineering and scientific development and workforce.

Irish Manufacturing Research (IMR)<sup>16</sup> is an advanced manufacturing research organisation which provides services to industry across digitisation, sustainable manufacturing, design for manufacturing, automation and advanced control.

Manufacturing and industry accounted for €200,119m in gross output nationally in 2017 according to the CSO. Notably a majority of gross output value originates from foreign-owner industry (78.5% or €157,130m) indicating the scale of foreign organisations in Ireland. These enterprises employ over 242,000 people.

These statistics have been localised to Dublin which accounts for the highest proportion of output value and persons employed of any region in Ireland in 2017 with over 51,000 persons engaged and with €30,766m in gross output. Notably the variance between foreign (55.5%) and Irish (44.5%) owned industrial businesses in Dublin is one of the most balanced. The Dublin region accounted for 15% of national industrial output in 2017 at €30.8 billion.

#### 5.2.2 Fingal Overview

Manufacturing is an important industry for Fingal as many companies are established in proximity to Dublin Airport and the Dublin Enterprise Zone to leverage logistics and economies of scale in the area.

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<sup>16</sup> <https://www.idaireland.com/doing-business-here/activities/advanced-manufacturing>

## 5 Sectoral Review Summaries

6.9% of Fingal resident workers were employed in manufacturing industries as of the 2016 Census, slightly higher than the county average (6.6%) and well below the national average of 11.4%.

The combined industries of manufacturing, mining and quarrying, electricity, gas, water supply and waste management employ 10.2% of all persons employed in Fingal County accounting for 9,254 jobs. A majority of these jobs (91.7%) are within key settlements which marks the highest proportion of any industry accounting for 8,485 urban jobs. Manufacturing has one of the highest job densities of any industries in Fingal, although with a high degree of variance. Density ranges are somewhat low in most settlements (lows of 3.3 in Portmarnock) whereas in Balbriggan and the CMA densities are at 35.7 and 25.5 respectively.

There are 318 enterprises within the GeoDirectory dataset (2020 Q4) categorised as manufacturing of which a majority are located within settlements (87.1%) with the remaining outside of settlements being defined as rural. The majority of these enterprises are located within the CMA (69.8%), Swords (6.9%) and Balbriggan (2.5%).

Within the manufacturing industry, NACE subgroups have been reclassified to understand the form and function of manufacturing in Fingal. 14.8% of these enterprises have overlap with the agri-food sectors as they relate to agri-food manufacturing (47). The majority (73.9%) of enterprises in this industry are general industrial manufacturing (235). 8.5% are medical and healthcare product manufacturers including the production of pharmaceutical products and instruments. The remaining 2.8% of manufacturers are retail manufacturers (9) which produce clothing and footwear.

## 5 Sectoral Review Summaries

### 5.3 ICT and Financial Services Sector

This section provides a sectoral summary of ICT and financial services given the close relationship between the industries in terms of employment and enterprise. In a majority of cases these industries share trends such as remote or smart working, technology, and infrastructure.

#### 5.3.1 [Global and National Overview](#)

##### **Information and Communication Technology**

The information and communication services sector numbered more than 1 million enterprises and employed almost 5.8 million people, in the EU in 2017 accounted for 4.6 % of total enterprises.

The labour productivity of the EU-27's information and communication services sector in 2017 was €83 000 per person employed, which was almost 70.0 % higher than the non-financial business economy average of EUR 49 500 per person employed. A double-digit share of non-financial business economy value added was recorded in Luxembourg (11.6 %), Malta (12.0 %) and Cyprus (12.6 %), with the highest share recorded in Ireland (14.1 %).

Large enterprises (employing 250 or more persons) dominated the information and communication services sector in the EU-27. In 2017, they reported a 58.1 % share of sectoral value added (equal to €279.3 billion), while contributing 40.5 % of the sectoral employment (almost 2.4 million persons).

Nationally, foreign direct investment (FDI) has been a defining driver of Irish economic growth. Much of the growth and the majority of employment in the ICT sector in Ireland comes from large Multinational corporations (MNCs). Much of this enterprise and employment has been within the Dublin region. While the impact for Fingal County has been less pronounced than Dublin City, it remains an important source of employment.

The ICT industry is responsible for approximately 25% of Ireland's total turnover and one third of Ireland's exports by value. The IDA<sup>17</sup> identifies Ireland as a global tech hub with over 37,000 persons employed generating €35bn in annual exports. Ireland is home to major global technology companies including Apple, Google, Microsoft, Facebook etc. There are 1,486 IDA supported companies in Ireland, 787 of those located in Dublin (53%). Fingal has comparatively good

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<sup>17</sup> <https://www.idaireland.com/doing-business-here/industry-sectors/ict>

## 5 Sectoral Review Summaries

concentrations of IDA support companies in the ICT sectors located in Blanchardstown and Swords.

Within Dublin, 1,067 tech start-ups have been identified. The majority (almost two thirds) are located in Dublin City Council with approximately 50 start-ups located in Fingal. These are primarily distributed within the Dublin City consolidation area with notable clusters in Mulhuddart, Swords and around the airport along with the Howth – Malahide corridor.

Ireland is the second largest exporter of computer and IT services in the world. With a highly creative and talented workforce, an open economy and a competitive corporate tax environment, Ireland has successfully attracted eight of the top 10 global information technology companies to establish a significant presence in the country.

### Financial Services

Banking and Payments Federation Ireland in conjunction with its affiliate, the Federation of International Banks in Ireland (FIBI) report in 2020 that Ireland is the fifth largest exporter of financial services in Europe. It concludes that financial corporations accounted for around a quarter of total corporation tax receipts in 2019, up from just under a fifth in 2011. This sector contributed close to €2.5 billion of the total €10.9 billion paid under that heading in 2019.

International financial firms employ over 46,000 people in Ireland generating an average of €2.3 billion in taxes per annum. 250 of the world's leading financial firms - including half of the world's top 50 banks - have internationally focused operations in Ireland and Dublin is a major global hub for fund administration, aircraft leasing, insurance and a range of wholesale banking activities with approximately €1.8 trillion of funds are administered from Ireland.

More recently, and as a result of Brexit, Ireland, and Dublin in particular, has seen a massive influx of new enterprise and employment. Much of this growth can be attributed to UK financial passporting concerns but regardless it will see Dublin continue to expand and diversify on its Financial Services sector into the future.

#### 5.3.2 [Fingal Overview](#)

20.3% (18,397) of those who work in Fingal work within professional industries such as information and communication, financial, real estate, professional, administration and support service activities. The CMA attracts 51% of persons employed in these industries with 22.1% in Swords, and a further 21.5% outside

## 5 Sectoral Review Summaries

of key settlements. The ICT and financial sector specifically have the most consistently high employment density rates and may provide an opportunity for compact employment growth if provided with technical development supports.

### **Information and Communication Technology**

There are 174 commercial entities in Fingal with their NACE activities categorised as Information and Communication which account for 2.5% of all enterprises. Within other professional industries such as financial and insurance, real estate, professional, scientific and technical and administrative and support services the ICT enterprises account for 13.6% of businesses.

ICT businesses are predominantly clustered within the CMA with 114 of the 174 business (65.5%). Of the remaining settlements the greatest clusters are in Swords (9.8%), Balbriggan (5.7%), and Malahide (5.2%). The largest ICT cluster according to the Fingal Skills Strategy (2019) is in Blanchardstown with IBM, Synopsys, PayPal and eBay located there.

In July of 2020 Amazon<sup>18</sup> announced creation of 1,000 jobs in Ireland in the next 2 years across sites in Cork and Dublin. The Dublin sites include Blanchardstown and North County Dublin and is expected to grow the sector significantly. These roles range from software and database engineers to data centre technicians and account managers.

Amazon has also commenced construction on phased data centre development in Mulhuddart in the Dublin Enterprise Zone adjacent to the Bristol-Myers-Squibb facility. The development is phased and was subject to multiple planning applications culminating in a data campus. There are three buildings supporting ancillary infrastructure in development.

### **Financial Services**

There are 206 commercial entities in Fingal with their NACE activities categorised as financial and insurance activities which account for 2.9% of all enterprises. Within other professional industries such as financial and insurance, real estate, professional, scientific and technical and administrative and support services the ICT enterprises account for 16.1% of businesses.

Financial and insurance businesses are predominantly clustered within the CMA with 122 of the 206 business (59.2%). Of the remaining settlements the greatest clusters are in Swords (18%) and Malahide (8.7%).

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<sup>18</sup> <https://www.fingalchamber.ie/news/details/amazon-creates-new-jobs-in-fingal-and-across-ireland>

## 5 Sectoral Review Summaries

### 5.4 Healthcare and Pharmaceutical sector

Ireland is one of the largest exporters of pharmaceuticals globally with annual exports of €80 billion. According to IDA Ireland<sup>19</sup>, there are over 85 pharmaceutical companies in operation including 9 of the top pharmaceutical organisations. The industry accounts for 32% of GDP (CSO 2019).

#### 5.4.1 Global and National Overview

- The expenditure on healthcare in Ireland was 22.5 billion euro (increase by 6% from previous year) in 2018, this equates to 6.9% of the GDP (CSO, system of health accounts 2018)
- The Pharmaceutical sector had an NSV of €53.9 billion in 2019 (CSO statistical release, 27 July 2020)
- Pharmaceutical products sales increased by 16.8% from 2018 to 2019, 46.1 billion euro to 53.9 billion euro (CSO statistical release, 27 July 2020)
- 9 out of the 10 largest pharmaceutical companies are planted in Ireland (Report on pharma and IP in Ireland, 02 August 2018)
- 50% of pharmaceutical exports in the EU come from Ireland (Report on pharma and IP in Ireland, 02 August 2018)
- 116,500 people are employed in the healthcare sector since 2017 (Health in Ireland, Key Trends 2018)
- Investment rates are high for pharmaceutical companies in Ireland, with 36 out of 51 patents being granted. (Report on pharma and IP in Ireland, 02 August 2018)
- Nursing holds the highest number of employees in the sector being at 37,000 (Health in Ireland, Key Trends 2018)
- Ireland is now the largest net exporter of pharmaceuticals in the EU accounting for over 50% of all exports from the country.

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<sup>19</sup> <https://www.idaireland.com/doing-business-here/industry-sectors/bio-pharmaceuticals>

## 5 Sectoral Review Summaries

### 5.4.2 [Fingal Overview](#)

#### **Employment**

CSO employment statistics do not provide granular employment statistics for the healthcare sector in isolation due to statistical suppression requirements. However, where typically grouped, the category of education, human health and social work activities incorporate this industry. These industries employ 16.9% of those employed in Fingal County Council accounting for 15,287 persons. These same industries account for 13.2% of enterprises in Fingal. These industries have generally lower employment density rates ranging from 9.2 persons per enterprise in Malahide to 16 persons per enterprise in Balbriggan.

#### **Enterprise**

There are 703 commercial entities in Fingal with their NACE activities categorised as human health and social work activities which account for 10.0% of all enterprises.

Human health and social work organisations are predominantly clustered within the CMA with 370 of the 703 business (52.6%). Of the remaining settlements the greatest clusters are in Swords (14.4%), Malahide (6.8%), and Balbriggan (5.5%).

Where the primary NACE groups in the GeoDirectory database do not have a single healthcare group, a custom reclassification of NACE subgroups was processed which yielded 944 enterprises relating to the broad categories of fitness and medical and healthcare. Fitness enterprises (279) are primarily those relating to sports clubs and physical health centres such as fitness facilities. These enterprises are mainly located in the CMA and outside of settlements.

Medical and healthcare enterprises (665) related to activities associated with healthcare ranging from pharmaceutical manufacturing, chemists, dental practices, general medical practices, hospitals, residential and nursing care and social work activities. Within this reclassification the primary sub-groups are general medical (23.8%), specialist chemists (12.5%) and dental practices (10.4%). These are clustered in the CMA (55.5%), Swords (15.8%) and Malahide (7.2%).

#### **Local Developments**

Many global pharmaceutical companies have chosen Fingal as their location for investment historically and there have been a number of significant recent investments of note. Bristol Myers Squibb is a long standing pharmaceutical company operating in Fingal (previously in Swords and now in Cruiserath) who invested approximately \$1 billion to establish their manufacturing facility in Cruiserath which was the first Bristol Myers Squibb biologics drug substance

## 5 Sectoral Review Summaries

facility outside of the United States and at the time, the second largest ever foreign direct Life and Sciences investment in Ireland. More recently, MSD Biotech which has been operational since 1990 is currently investing and expanding their facility adjacent to Barrysparks which is opening in 2021 and is expected to provide around 350 additional jobs in the pharmaceutical and biotechnology industry. Some of the other relevant pharmaceuticals operating in Fingal include Alexion and Mallinckrodt in Blanchardstown, SK Biotek, Newport and Kora Healthcare in Swords along with Astellas and Rottapharm in Mulhuddart.

Healthcare is also strong in Fingal with various health centres and social infrastructure across the county along with nationally significant healthcare infrastructure.

The Central Mental Hospital which is currently located in Dundrum will be moving to a new site in Portrane, known as the National Forensic Mental Health Service (NFMHS). This is currently being commissioned and expected to commence operations in 2021. Once operational, the new facility can provide care for up to 170 patients and it is located in the vicinity of the former St Ita's Hospital. The clusters of forensic mental health care will include Intensive Care Rehabilitation Unit (ICRU), Forensic Child and Adolescent Mental Health Facility (FCAMHS), Pre-discharge, female, mental health intellectual disability, high security and medium security units. There will also be a Village Centre, which will provide health, vocational, recreational and social opportunities for patients.

## 5 Sectoral Review Summaries

### 5.5 The Retail Sector

The retail sector is the single largest industry in Fingal County Council by count of enterprise (2020 Q4) with over 1,500 businesses active within the industry.

#### 5.5.1 [Global and National Overview](#)

The retail sector is one of the largest employers nationally (14% according to *Shaping the future of Irish Retail 2020*) and with restrictions imposed during long stretches of 2020 and most of 2021 it is an industry undergoing rapid transition.

The following insights from the CSO (2021) are indicative of changes in the industry:

- Retail sales have decreased by 21.8% in January of 2021 compared to the same time in 2020.
- Sales decreased by 14.1% on an annual basis from January 2020 to January 2021.
- Retail sale online has increased by 10.9% in January 2021 compared to December 2020.

With online shopping growth trending in recent years, 2020-2021 has seen the trend come to the fore in more rapid transition as a requirement for businesses to survive and compete. For extended periods since the pandemic outset a majority of retail businesses have had to innovate and adapt to the online marketplace with online sales climbing over 10% in a single year alone.

According to *Shaping the future of Irish Retail 2020* published by IBEC and Retail Ireland:

- The retail industry employs over 280,000 of which over 70% of retail jobs are located outside the Dublin region.
- Ireland has the 4<sup>th</sup> highest retail wage in the EU, with it being 46.5% above the EU standard.
- The retail industry in Ireland generates 23% of total tax returns.
- The retail industry is either the first or second largest employer in all regions, which ranges between 12% to 15.5%.

Further to the significant implications of COVID-19 on retail, the industry is faced with further challenges with Brexit (further elaborated in Section 6.2) which has

## 5 Sectoral Review Summaries

and will consider to cause considerable disruption for the industry specifically with complex additional requirements for trade processes. These effects will be felt by those reliant on imports without stock diversification.

### 5.5.2 [Fingal Overview](#)

The national commercial vacancy rate (all industries) as of 2020 Q4 was 13.5%. This indicates a growth of 0.2% in vacancy compared to the same period in 2019 bringing the total vacant property count to 28,572. GeoView insights (*GeoView Commercial Property Report Q4 2020*) indicate that the retail and wholesale sector has seen a significant decline with a 5.3% loss of units (2,000+). The Dublin commercial vacancy rate was 11.9%. Using GeoDirectory data for the same period the vacancy rate in Fingal was determined to be 13%. Vacancy rates are indicative of the local economic health of towns.

CSO employment statistics do not provide granular employment statistics for the retail sector in isolation. However, where typically grouped, the category of wholesale retail, trade, transportation and storage, accommodation and food services are incorporate this industry. These industries employ 40.2% of those employed in Fingal County Council accounting for 36,357 persons. These same industries account for 21.9% of enterprises in Fingal. These industries have employment density rates ranging from as low as 7.8 persons per enterprise in Skerries to 26 persons per enterprise in Swords.

There are 1,536 commercial entities in Fingal with their NACE activities categorised as wholesale and retail trade, repair of motor vehicles and motorcycles which account for 21.9% of all enterprises.

Retail centres have been identified in the following locations via clustering analysis;

- Swords with specific sites at Airside Retail Park, Swords Shopping Centre and Main Street,
- Blanchardstown with specific sites at Coolmine Industrial Estate, Blanchardstown centre and nearby in Castleknock.
- Wholesale sites in the Dublin Enterprise Zone
- Dublin Airport and business parks to the south at the M50 and M1 interchange (Furry Park, Woodford, Airways etc.).
- Baldoyle Industrial Estate

## 5 Sectoral Review Summaries

- Malahide and Skerries town centres
- Balbriggan town centre and Millfield shopping centre

These organisations are predominantly clustered within the CMA with 794 of the 1,536 business (51.7%). Of the remaining settlements the greatest clusters are in Swords (13.6%), Balbriggan (6.1%), and Skerries (3.6%).

Where the primary NACE groups in the GeoDirectory database do not have a single retail group, a custom reclassification of NACE subgroups was processed which yielded 1,134 enterprises relating to the broad categories of retail (19.2%), wholesale (13.5%) and specialist retail (67.3%). Generic retail includes activities such as the sale of everyday items and foods defined as non-specialised. Specialist retail includes activities such as machinery, textiles, and hardware where defined as specialised. The remaining 402 enterprises relate to sale of medical equipment and vehicle related activities. These enterprises are clustered in the CMA (51.0%), Swords (14.9%) and Balbriggan (7.1%).

Retail has been identified to form the core enterprise base of the vast majority of settlements in Fingal, as identified throughout Section 4.3.4. The current retail hierarchy has been evaluated in terms of service provision and clustering in the below Table 5-1. The evaluation indicates that the retail hierarchy has remained accurate in its categorisation of towns and settlements on the basis of quantum of retail units, variety of service provision and service capacity of which resident population, employment and tourism are significant factors.

### 5.5.3 [Retail Hierarchy](#)

Retail demand is largely a function of population and available consumer expenditure. Overall population growth in Fingal County has been significant over the past 10 years. Levels of growth have not been evenly distributed across the county but has largely focused in existing urban centres. Swords, and Blanchardstown account for 30.7% of the absolute growth (10.4% and 20.3% respectively), while existing Level 3 settlements account for a further 34.6%. The remainder account for 34.7%. Spatially, population growth appears correlated to proximity to Dublin City and the M50/M1 network.

## 5 Sectoral Review Summaries

The current Fingal retail hierarchy is set out in Table 5-1 below:

Table 5-1 Fingal Retail Hierarchy Overview and Evaluation

Retail Level	Urban Centre Location
<b>Level 1: Metropolitan Centre</b>	Dublin City Centre
<b>Level 2*: Major Town Centres</b>	Swords, Blanchardstown
<b>Level 3: Town Centres</b>	Balbriggan, Malahide, Skerries, Charlestown, Donabate, Lusk, Rush Blanchardstown Village, Mulhuddart, Clonsilla, Castleknock, Howth, Portmarnock, Baldoyle, Ongar, Sutton, Balrothery, Applewood, Stapolin, Racecourse, Santry Demesne, Bayside, Castlemills, Carrickhill, Tyrellstown, Roselawn and Rathbeale
<b>Level 4: Small Towns and Village Centres; and Local Centres</b>	
<b>Level 5: Local Shops and Small Villages</b>	Kinsaley Village, Kinsaley, Feltrim Brackenstown, Holywell, Rivervalley, Seabury, Castlelands, Mountview, Hartstown, Huntstown, Carpenterstown, Boromimhe, Ridgewood, Laurel Lodge, Corduff and Loughshinny Balscadden, Naul, Garristown, Oldtown, Ballyboghil, Rowlestown, Coolquay and Rivermeade

Using absolute population growth<sup>20</sup> as a proxy for demand, growth has roughly been in line with the expectations set out within the Retail Hierarchy for Fingal.

A notable feature has been Balbriggan, which has seen a significant population growth of 14.7% over the ten-year period. This aligns with recent data on employment in the Retail sector in Balbriggan which indicates there were 962 jobs (29.4% of all employment in Balbriggan) in 2016 accounting for 2.6% of total retail jobs in Fingal County. Equally, this is reflected in the total number of NACE coded enterprises (94 or 6.1% of total retail enterprises in Fingal). Balbriggan is a rapidly developing Level 3 town centre and retail demands will need to match the requirements of future resident populations.

<sup>20</sup> Approximated population growth via application of underlying electoral division data in lieu of settlement-specific due to data constraints.

# 5 Sectoral Review Summaries

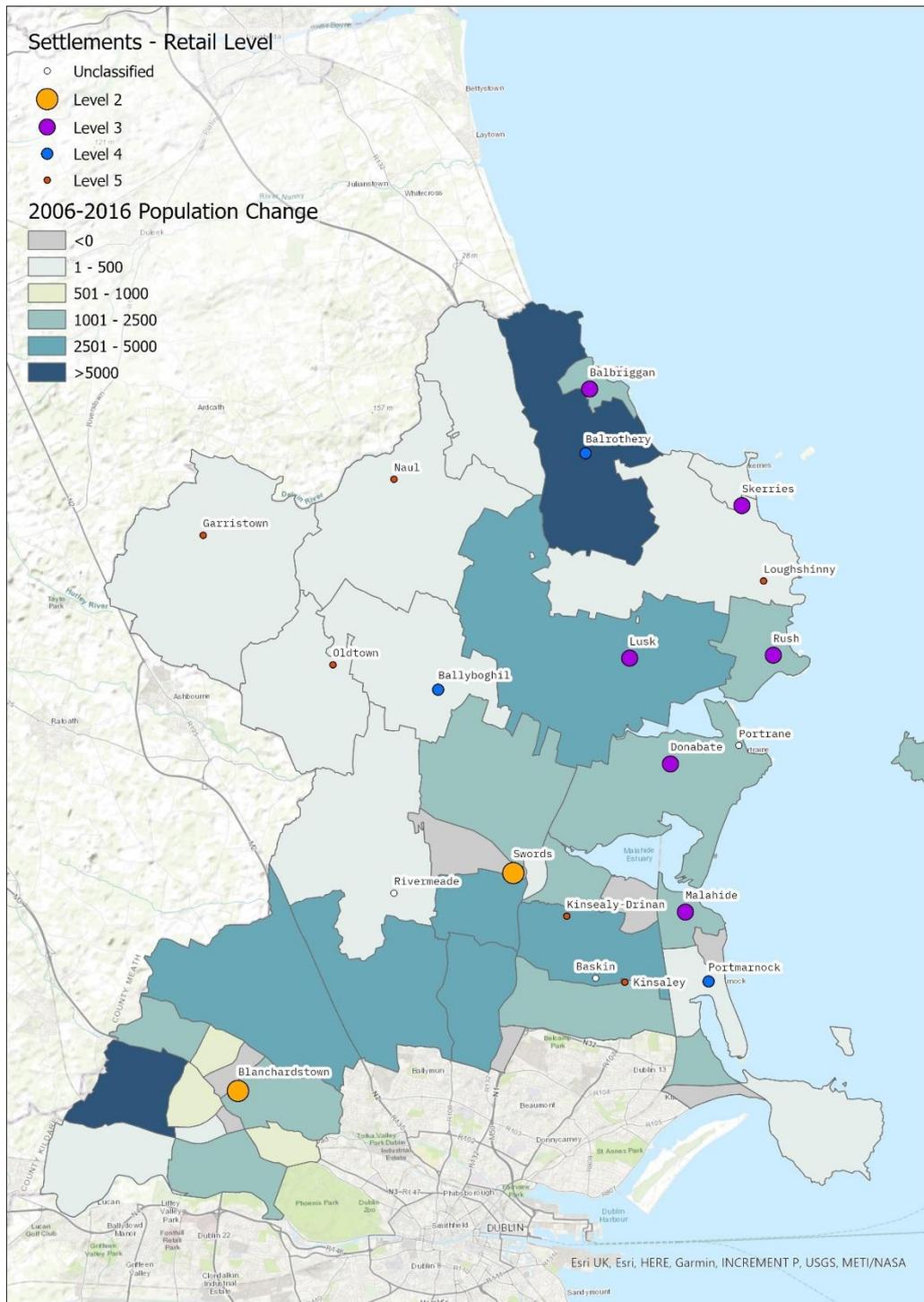


Figure 5-1 Map of ED population growth 2006-2016 with settlements overlaid

## 5 Sectoral Review Summaries

### 5.6 The Tourism Sector

The tourism sector plays a key role in the Fingal's local economy and accounts for a significant amount of employment. Furthermore, through Dublin Airport Fingal provides the national major link between Ireland and international tourists.

#### 5.6.1 [Global and National Overview](#)

In 2018, one in ten enterprises in the European non-financial business economy belonged to the tourism industries. These 2.4 million enterprises employed an estimated 13.6 million persons. Enterprises in industries with tourism related activities accounted for 9.5 % of the persons employed in the whole non-financial business economy and 21.7 % of persons employed in the services sector. The tourism industries' shares in total turnover and value added at factor cost were relatively lower, with the tourism industries accounting for 3.9 % of the turnover and 5.8 % of the value added of the non-financial business economy.

Tourism plays a crucial role in terms of a countries economic and employment potential. More than three out of four enterprises in tourism industries in the EU-27 operated in accommodation (14 %) or food and beverage serving (61 %) activities in 2018. The sector has grown by number of enterprises by over 25% since 2012.

Tourism is a significant factor in the development of European regions. Infrastructure created for tourism purposes contributes to local development, while jobs that are created or maintained can help counteract industrial or rural decline. 'Sustainable tourism' has also grown rapidly over the past decade involving the preservation and enhancement of cultural and natural heritage, ranging from the arts, to local gastronomy, or the preservation of biodiversity

Expenditure by tourists visiting Ireland (excluding receipts paid to Irish carriers by foreign visitors) was estimated to be worth €5.6 billion in 2019. Combining spending by international tourists with the money spent by Irish residents taking trips here and receipts paid to Irish carriers by foreign visitors, total tourism expenditure in 2019 was estimated to be €9.5 billion.

In 2019 the value of exported goods and services was estimated at €440 billion of which €7.4 billion can be directly attributed to tourism (i.e., foreign exchange earnings), accounting for 1.7% of export earnings. Being largely service based, tourism goods have low import content in comparison to other exports.

## 5 Sectoral Review Summaries

More recently, the global and domestic tourism markets have been devastated by the impacts of COVID-19 given the reduction in flights and restrictions imposed in both 2020 (Q2-Q4) and more recently the extended restrictions in present in 2021 Q1. The tourism industry is one of the worst affected. Given the inextricable link between the tourism and aviation sectors, the implications of damage to the aviation sector has had a severe impact on tourism.

The Irish VAT rate applying to certain goods and services, mainly in the tourism and hospitality sectors, will decrease from 13.5% to 9% for the period from 1 November 2020 to 31 December 2021 to encourage growth in sectors like Food and drink in restaurants, hotels, cafés, take-aways, Hotel and guesthouse accommodation and Cinemas, live theatrical or musical performances and exhibitions.

The Irish government has created a range of initiatives and grant mechanisms to support the tourism and hospitality industry as a result of Covid-19, as well as mitigating against some of the effects of Brexit.

### 5.6.2 [Fingal Overview](#)

Tourism is an important indigenous sector in Fingal, in terms of generating revenue and employment. It is estimated that visitors to Fingal generate a €500 million spend, which sustains a total of 20,000 jobs (one in four jobs in Fingal) across all sectors (transport, retail, entertainment and other services). Fingal's Tourism sector is characterised by large numbers of SMEs, with 800 businesses providing accommodation and catering services. Guest accommodation supports an estimated 3,000 full time job equivalents and the catering sector provides a further 2000 jobs.

There are 565 Fáilte Ireland registered attraction assets within County Dublin, of which 58 are registered within Fingal (i.e. 10.3% of the total registered assets in Dublin). As illustrated in Figure 5-2 (overleaf) many are concentrated around the Dublin city consolidation area, Swords, Malahide, Dublin Airport and Howth.

Many of these attractions are associated with nature, heritage and the coastline particularly in Howth, Malahide, Skerries and Balbriggan. These are also a relatively high concentration around Dublin Airport (mostly associated with ground-based supporting services) and Blanchardstown (including the National Aquatic Centre, Draóicht theatre and Farmleigh House).

The Fingal Visitor Survey 2019 surveyed that the primary nationalities visiting Fingal were American (18.2%), Irish (16.4%) and Italian (9.1%). with 69.1% of visitors aged between 18-60. The most common group size was two persons and

## 5 Sectoral Review Summaries

is likely indicative of couples with the vast majority of visitors also choosing to stay in Fingal (70.9%) and travel by car to the county (51.9%). The average expenditure for a respondent was under €50 with 70.6% of visitors not spending above this. Just 7.8% spending more than €100.

There are 107 tourism and hospitality entities in Fingal as categorised by NACE activity which account for just 1.5% of all enterprises. A majority of these businesses are predominantly clustered within the settlements in proximity to Dublin City and coastal areas with 22 of the 107 business (20.6%) in the CMA. Of the remaining settlements the greatest clusters are in Swords (20.6%), Portmarnock (10.3%), and Malahide (5.2%). A further 28% of tourism and hospitality businesses are located outside of settlements.

Dublin Airport is considered a significant employer within the transport industry and major contributor to the local and national economy. During 2019 Dublin Airport welcomed 32.9 million passengers, supported 19,200 full time equivalent (FTE) jobs and contributed €1.7 billion Gross Value Added. Indirectly, Dublin Airport is estimated to facilitate 129,700 jobs and contribute €9.8 billion Gross Value Added nationally in total which is equivalent to 3.1% of national Gross Domestic Product (InterVistas, 2019).

The Fingal Tourism Strategy 2015 – 2018 was prepared to development the tourism sector across the county with support and buy-in of relevant public, private and community tourism stakeholders. Fingal, as an integral component of the Greater Dublin tourism destination, looks to benefit from the tourism rising tide and compete for a share of growing flows of visitors to Dublin which was projected to deliver a doubling of tourism expenditure in the Greater Dublin area to €2.5 billion by 2020 and the creation of almost 20,000 new jobs.

The plan concluded that in Fingal, the industry is heavily dependent on day trip visitors to coastal and heritage attractions with a majority of visitors concentrated on Dublin Airport. The primary market for tourism is the Irish domestic market and NI, with visitors from UK and USA the most important international markets.

The primary attractions identified in the plan are;

- **Natural and Manmade:** coastline, landscapes such as Liffey Valley, outdoor recreation and sporting activities, coastal towns and villages.
- **Events and Festivals:** Dublin Bay Prawn Festival, Flavours of Fingal County Show, Soundwaves amongst others.

## 5 Sectoral Review Summaries

- **Culture and Heritage:** Malahide Castle and Gardens, Newbridge House and Farm, Swords Castle, Draíocht Arts Centre amongst others.
- **Other:** proximity to Dublin Airport and Dublin City, shopping attractions in Blanchardstown and Swords etc.

The Fingal Tourism Development Office was established under the Tourism Strategy 2015-2018 to harness the combined resources of Fingal Tourism Ltd. and Fingal County Council. It acts as the focal point for all tourism related enabling and support functions and provides a 'one-stop shop' for the industry.

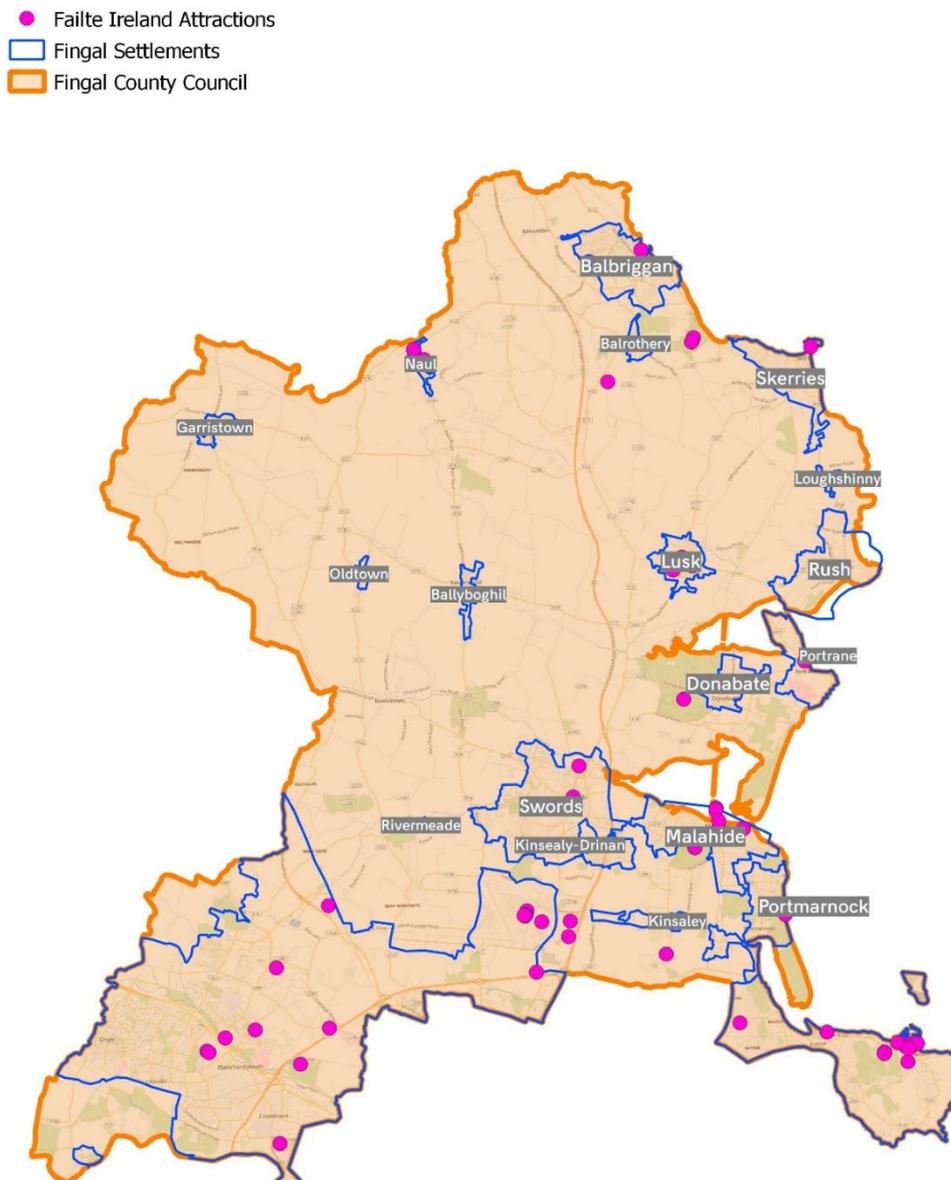


Figure 5-2 Fáilte Ireland Tourist Attractions in Fingal

## 5 Sectoral Review Summaries

### 5.7 The Aviation Sector

The aviation sector plays a key role in Fingal's local economy with Dublin Airport. The airport is Ireland's main source of international tourism arrivals and is a driver of local tourism, local employment and has spawned many new indirect but synergistic enterprises.

#### 5.7.1 [Global and National Overview](#)

Pre-March 2020, the global estimated market size within the Aviation sector was 4.3 billion passengers. IATA indicates that the market is forecast to grow to 8.2 billion passengers by 2037, almost doubling the size of the sector over the next 2 decades.

The worldwide commercial fleet, approximately 25,000 in-service aircraft, was forecast to expand to 37,800 over the next decade. The significant increase in aircraft numbers was estimated to see a global requirement for an additional 800,000 new pilots, 750,000 engineers and c.900,000 cabin crew over the next twenty years. Europe alone would require an additional 146,000 new pilots, 135,000 engineers and technicians and 187,000 cabin crew by 2037.

The aviation industry is worth €4.1bn to the Irish economy along with the leasing sector pulling in €550m alone making it a significant contributor. Nine of the world's top 10 lessors are also headquartered here with over 50 per cent of the world's leased aircraft managed and owned in Ireland, providing employment for around 44,000 full-time workers with 5,000 of these from the leasing companies.

In 2019 alone there were over 76,000 flights handled by Ireland's five main airports in the third quarter. Dublin accounted for 82.5% of all flights (63,032) while Cork handled 8.2% of all flights (6,274).

Over 140,000 jobs supported by the air transport sector in Ireland including - 39,000 (airlines, airport operators, airport on-site enterprises, aircraft manufacturers, and air navigation service); with an estimated additional 105,000 jobs supported by the air transport sector: 25,000 in the supply chain; 11,000 as a result of employee spending; and 69,000 by international tourism. It is estimated that the air transport sector supports €8.9 billion of Ireland's GDP. Approximately, 6.8% of GDP was supported by air transport and foreign tourists arriving by air in 2018 and spending by foreign tourists supports a further €8.7 billion of the country's GDP.

## 5 Sectoral Review Summaries

Ireland has a highly skilled and experienced workforce, which is a key factor in attracting foreign direct investment in any country and Ireland has done exceptionally well at specialising in the field of aviation and aviation finance that has enabled the country to plan and invest in commercial, financial and technical skills while also tailoring and introducing relevant courses to meet the demand for these specific careers in Universities and colleges and has also introduced the first master's in aviation finance in Europe.

The CSO reports an 87.5% drop in the number of passengers in the main Irish airports in Q3 of 2020 when compared to Q3 of 2019 with a further significant decline in passengers during the initial period of travel restrictions imposed in Q2 of 2020. There is further decline anticipated in Q1/Q2 of 2021 given continued restrictions. Prior to the COVID-19 pandemic and associated restrictions, Dublin airport had sustainably grown its passenger count per annum by an average of 8.1%.

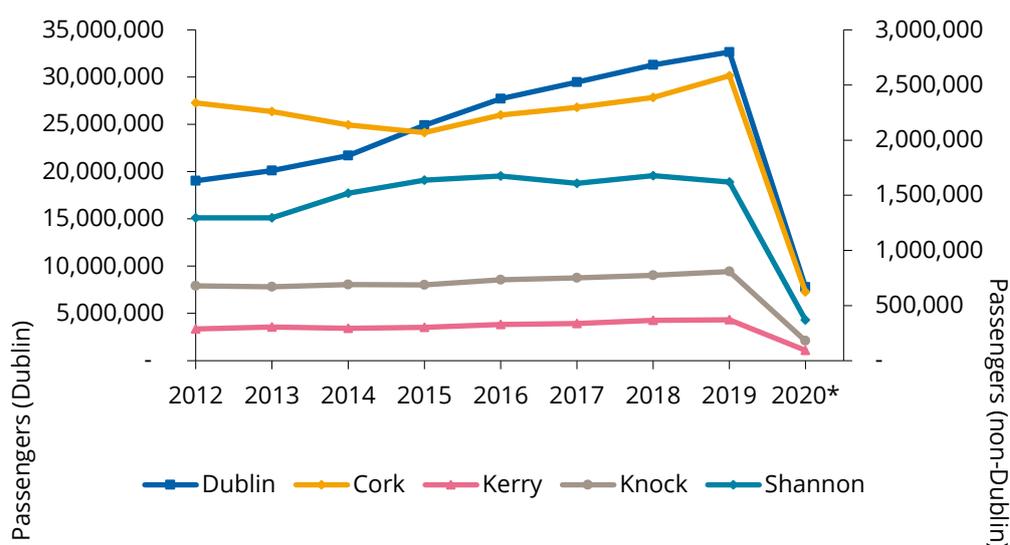


Figure 5-3 Seasonably Adjusted Passenger Figures in National Airports (CSO)

### 5.7.2 Fingal Overview

The Aviation and Tourism sectors in Fingal are intrinsically linked. Dublin Airport is considered a significant employer within the transport industry and major contributor to the local economy. During 2019 Dublin Airport welcomed 32.9 million passengers, supported 19,200 full time equivalent (FTE) jobs and contributed €1.7 billion Gross Value Added. Indirectly, Dublin Airport is estimated to facilitate 129,700 jobs and contribute €9.8 billion Gross Value Added nationally in total which is equivalent to 3.1% of national Gross Domestic Product (InterVistas, 2019).

## 5 Sectoral Review Summaries

Dublin Airport is the largest employer in the region. Crucially, for every job created in the airport, four are created in the region as a direct result. It is estimated that visitors to Fingal generate a €500 million spend, which sustains a total of 20,000 jobs (one in four jobs in Fingal) across all sectors (transport, retail, entertainment and other services).

The level of direct, indirect and catalytic economic benefit that Fingal can harness from the aviation sector is likely to continue to grow into the future as air travel and the aviation sector continues to grow globally and nationally.

### 5.8 Marine Sector

#### 5.8.1 [National Overview](#)

The marine sector is an important facet of the Irish economy and contains diverse economic activity relating to fishing, shipping and logistics, transport, tourism and recreation. The marine sector is spatially relevant to towns situated on the coast or in proximity to significant river networks. As such the coastal towns of Howth, Balbriggan, Malahide, Rush and Skerries are of particular relevance to Fingal to leverage its coastal assets and grow the marine economy.

The sea is a national asset with provision for the marine economy and global market. Ireland has 7,500km of coastline according to the Marine Institute, and is one of the largest EU states when factoring in seabed territory.

Ireland's ocean economy had an economic value of €1.2 billion in 2010, accounting for 0.8% of national GDP according to NUIG's Socio-Economic Marine Research Unit (SEMURU). This report further identifies the potential growth of the marine industry with technological advancements in products and services, biotechnology, bioproducts and renewables. Shipping, transport, tourism and manufacturing are well established facets of the marine sector and are of particular relevance to Fingal.

#### 5.8.2 [Fingal Overview](#)

Fingal's local marine sector is diverse based on location and activity ranging from fishing and recreational fishing to equipment retailing, recreation, transport and distribution.

Bord Iascaigh Mhara (BIM) identified the strongly performing coastal towns such as Howth, Balbriggan, Skerries, Malahide and Donabate in 2013. These key towns contain economic assets and infrastructure such as marinas, ports, fisheries and harbours.

## 5 Sectoral Review Summaries

There is local awareness to the sensitivity of the development of the marine sector given environmental considerations for expansion, construction and growth. Growth of this sector must be environmentally sustainable.

There are a significant number of environmentally sensitive areas identified in Fingal County Councils coastal regions.

There are a number of Special Areas of Conservation (SAC) designated as important for conservation by both Ireland and the EU under the Habitats Directive. These include; North Bull Island SAC, Howth SAC, Howth Head SAC, Irelands Eye SAC, Rockabilly to Dalkey Island SAC, Baldoyle Bay SAC, Malahide Estuary SAC, Rogerstown Estuary SAC, and Lambay Island SAC.

There are a number of Special Protection Areas (SPA) designated as important for conservation under the EU Birds Directive. These include; North Bull Island SPA, Howth Head Coast SPA, Irelands Eye SPA, Baldoyle Bay SPA, Malahide Estuary SPA, Rogerstown Estuary SPA, Lambay Island SPA, Rockabill SPA, Skerries Islands SPA and the River Nanny Estuary and Shore SPA,

### **Coastal Towns**

The coastal towns of Howth, Balbriggan, Malahide, Rush and Skerries benefit the most from the growth of the marine sector. In each case, the towns can leverage its coastal nature for economic growth in associated sectors such as tourism, fishing, import and export and logistics. These towns have a natural advantage in that the marine sector is strongly interrelated with tourism, manufacturing and retail including restaurants.

Howth has a strongly established marine sector with business ranging from fishing, fishing associated retail and restaurants to wider benefits in the tourism and hospitality industries. Howth has a particularly strong asset in its harbour with the west pier containing a variety of restaurants and fisheries, the east pier providing recreational uses and there are further coastal recreational activities in the Howth cliff walk routes and cycleways extending towards Baldoyle-Portmarnock-Malahide and Sutton-Bayside-Clontarf.

Malahide is a strong performing coastal town with a wide variety of natural marine assets in its immediate environment such as the Broadmeadow estuary which contains the Malahide marina with recreational uses including various boat and yacht clubs and the waterfront pathway that connects to Swords. Additionally, Malahide beach is an attraction in its own right ranging 2km up the northern shoreline with popular swimming areas in Low Rock and High Rock and the coastal walkways towards Portmarnock. Malahide also has a wide variety of

## 5 Sectoral Review Summaries

inland tourism activities such as Malahide Castle and Gardens and restaurants that benefit from the natural attraction of and proximity to its marine assets.

Rush is a rapidly growing seaside town with two beaches: north and south beach which are separated by the peninsula head and Rush harbour. Rush has access to Lambay Island given that it is the closest natural point and the Rogerstown Estuary is popular for walking, boating and water-based recreational activities.

Skerries has a long-established fishing industry and marine-based sector given proximity to the various islands (Rockabill, Shenick, St Patrick's and Colt islands). Its coastal location supports tourism and there are a number of waterfront activities including sailing clubs, fishing restaurants as well as coastal walkways that benefit from Skerries harbour and the extensive beaches on both sides of the peninsula.

Balbriggan is a vibrant and diverse seaside town with an active harbour and local beaches. Balbriggan is also undergoing development of its harbour area under the Balbriggan Rejuvenation Plan 2019-2025 (€30m funding allocated by the Government under the URDF) which is intended to increase the attraction of its marina through development at the railway viaduct and RNLI boathouse, reimagined harbour area, and improvements to the Bremore regional amenity park.

Overall, there is 88km of coastline in Fingal County Council with quality beaches in the following locations; Loughshinny beach between Rush and Skerries, Balcarrick Beach and coastal walk, Rush North and South beach, Malahide beach and marina, Brook beach and Tower Bay beach in Portrane, Velvet strand in Portmarnock, Balbriggan Beach, Claremont Beach in Howth, Skerries South and North beach and Burrow beach in Sutton. Specifically, Velvet Strand at Portmarnock was awarded a Blue Flag in 2020 whilst Velvet Strand and Burrow Beach (Portmarnock and Sutton respectively) were awarded a Green Coast Award in 2020. Coastal walks and cycleways are also particularly popular in Fingal and the use of the natural coastal assets has increased as a result of COVID-19 as many people make use of these.

### Local Developments

Fingal County Council has been allocated €200,000 to construct the Fingal Coastal Way, a recreational walking and cycling route stretching 32km from Newbridge in Donabate to the county boundary beyond Balbriggan. This development was awarded under the Carbon Tax Fund 2020 by the Department of Climate Change, Communications Networks and Transport.

## 5 Sectoral Review Summaries

This route is to be developed in connection with the €12m Broadmeadow Way, an off-road cycling and walking route linking Malahide and Donabate across the Broadmeadow Estuary.

In addition, there is a further project underway linking the Malahide to Sutton greenway through Portmarnock village. These developments will enrich the lives of residents and encourage recreational activity along coastal towns. These amenities will provide quality attractions to coastal towns for local, national and international visitors.

### 5.9 The Green Economy

#### 5.9.1 [National and Fingal Overview](#)

The Green Economy refers to an increasingly sustainable approach that has been advocated in recent years for undertaking and engaging in economic activity. It 'encompasses a range of activities, spread across different sectors of the economy, which have the common objective of providing goods and services in a sustainable way that reduce the impact on the environment'.

The proper management of resources is crucial to securing a better, more sustainable Ireland for future generations and is central to the National Climate Action Plan (CAP) as 60% of greenhouse gas emissions come from the use of materials. The emergence of the COVID-19 coronavirus has also provided further evidence of the limitations of our current economic model with its long and complex global supply chains.

The Europe 2020 Strategy is the Commission's strategy for smart, inclusive and sustainable growth by actively supporting businesses, administrations and consumers improve the resource-efficient, green, and competitive low-carbon economy. It estimated that eco-design, eco-innovation, waste prevention and the reuse of raw materials can bring net savings for EU businesses of up to €600 billion. Additional measures to increase resource productivity by 30 % by 2030 could boost GDP by nearly 1 %, while creating 2 million additional jobs. It also benefits the environment and reduces Europe's greenhouse gas emissions.

Fingal is tapping into this Green Economy movement and supports a range of initiatives:

**Green Enterprise: Innovation for a Circular Economy** - To be proactive in this approach, Fingal promotes the EPAs recent funding initiative relating to the Circular Economy. The initiative seeks to explore ways to build the economy of Fingal back up in a way which addresses the sensitive nature of supply chains

## 5 Sectoral Review Summaries

and ensures that we can recover in a more local, sustainable manner. Reusability and the potential for remanufacturing offer opportunities for resilience (stock availability) and competitiveness.

An important area for circularity is in the food production sector, which is particularly strong in Fingal and exploring the potential for regenerative agriculture, promotion of effective agricultural supply chains and digitally enabled, optimised supply chains and peri-urban production. For example, in China community-supported agriculture, an innovative model connecting urban dwellers and their peri-urban organic food growers, has seen business growth and increased customer satisfaction during the COVID-19 lockdown.

**The Green for Micro programme** - launched in 2021 as part of Local Enterprise Week (LEW), the programme is an initiative from the Local Enterprise Offices (LEOs), with support from Enterprise Ireland, and is being rolled-out nationwide to help prepare small businesses for the low-carbon, more resource-efficient economy of the future.

With the help of a Green Consultant, small businesses with up to ten employees can get free advice and technical support on resource efficiency, how to better understand their carbon footprint and how to implement an environmental management system to reduce costs and lower greenhouse gas emissions.

**Sustainable Business initiative** – launched in 2021 to encourage SMEs across Fingal to embrace sustainable measures in their businesses, with a series of practical tools and resources to help them. This initiative includes a dedicated sustainable resource hub for SMEs, as well as a competition to inspire businesses on their sustainability journey with an opportunity to win a Sustainability Assessment & Action Plan from Balbriggan based Patel Tonra Ltd. Environmental Solutions.

**The Green Way** - Another ongoing example of a Green Economy in Fingal is The Green Way, of which Fingal is one of six founding Members. The initiative supports innovative clean technologies and connects organisations that have developed clean technology products and solutions with growth opportunities.

## 5 Sectoral Review Summaries

### 5.10 The Rural Economy

Rural economy is a section that focuses on the development of many elements such as farm management, farm health and safety, rural financial management, farm buildings and small rural residential areas, organics, and equine sectors. Economic activities and spatial distribution should be key aspects to proper rural economic development.

#### 5.10.1 [Global and National Overview](#)

- Over a third (31.4%) of the population in Ireland live in a rural area which is above the EU average of 27.3% with a 0.6% decline in number of people living in rural areas from 2011 to 2016
- There is €275,000 in funding available for agri-food tourism in rural areas with up to €25,000 claimable for significant projects.
- The Department of Agriculture, Food and the Marine's Rural Development Programme has a €1.25m budget for rural development projects of greater than €50,000 with €60m invested thus far (Teagasc).
- Disposable income in rural towns were estimated at 17,433 euro while in urban areas it is 23,497 euro in 2017
- In the first quarter of 2019 unemployment rates in rural areas with a high urban influence was 4% while in urban towns it was 6.3%.
- The median property price in rural areas was €125,000 in comparison with urban areas (€336,000) and the national average (€249,999).
- The average age in rural areas is higher than those in urban areas (45 years and 36 years of age respectively)
- A significant portion of the young workforce (aged 19-25) migrate to urban areas for education and work nationally.
- Project Ireland 2040 has issued €1 billion from 2019 and 2027 towards the Rural Regeneration and Development Fund.

#### 5.10.2 [Fingal Overview](#)

Rural Fingal is comprised of a large number of diverse towns, villages and natural assets. The rural economy is driven by minor towns and villages such as Portrane, Coolquay, Kinsealy, Rivermeade, Rolestown as well as other core

## 5 Sectoral Review Summaries

towns such as Balrothery, Loughshinny, Ballyboughal, Naul, Balscadden, Oldtown, Garristown, Ballymadun and other areas.

The Regional Planning Guidelines (RPG) have identified the targeted growth of the rural economy (both in general development and viability) via development of ICT infrastructure, specifically broadband. Given the restrictions in 2020 and 2021, these developments are increasingly critical for the livelihood of the rural and urban areas alike.

The RPG have further identified the key specialist food production sector and how these locations can benefit from the metropolitan fringe areas (as identified alongside the CMA) to leverage connectivity for growth.

### 5.11 Other Sectoral Activity

The 7,000+ businesses in Fingal were classified using their respective NACE Code subsectors to create custom groupings and understand patterns in sectoral change in Fingal. This analysis yielded the following results and identified that the largest sectors are:

- Retail and specialist retail (14%)
- Medical, healthcare and pharmaceutical (9.5%)
- Food and beverages (9.3%). Additionally, agri-food and manufacturing account for an additional 0.7% of businesses
- Agriculture (5.7%)
- Childcare and education (5.3%)
- Vehicle repairs and activities (5.1%)
- Professional services (5.1%)
- Financial services (4.9%)
- Transportation (4.2%)

## 6 Emerging Trends – Economy and Employment

### 6 Emerging Trends – Economy and Employment

#### 6.1 COVID-19

Up to March 2021, there have been 219,512 cases of COVID-19 in Ireland and 4,319 deaths. Of those, approximately 75,958 occurred in County Dublin.

Records of confirmed COVID-19 cases since August of 2020 identify significant variance over time and between the areas within Fingal. Swords, Blanchardstown-Mulhuddart and Howth-Malahide were worst affected during the peak (or third wave) with highs of approximately 1,800, 1,700 and 1,700 cases respectively in the second week of January 2021. Balbriggan and Rush-Lusk were the least affected with peaks of approximately 870 and 1,200 cases at the same time.

Whilst the future of the COVID-19 is unclear at the time of writing, analysis was undertaken by the Eastern and Midlands Regional Assembly in May 2020 to understand potential impacts at the regional, county and settlement level. This analysis developed a COVID-19 exposure ratio per area and determined that the Eastern and Midlands Region is least exposed of all regions whilst Dublin is the least exposed of all sub-regions, counties and cities in the country. The following towns within Fingal were identified as being exposed to significant economic disruption caused by COVID-19:

- Rush was identified as the sixth most exposed settlement nationally with an exposure ratio of 59.6% as 81 units operate in sectors likely worst affected;
- Balrothery was identified as the eighth most exposed settlement nationally with an exposure ratio of 58.8% as 10 units operate in sectors likely worst affected;
- Skerries was identified as the twelfth most exposed settlement nationally with an exposure ratio of 56.9% as 124 units operate in sectors likely worst affected;
- Other towns identified as being exposed across Fingal include:
  - Portmarnock has an exposure score of 53.9%
  - Lusk has an exposure score of 48.5%
  - Malahide has an exposure score of 47.4%
  - Balbriggan has an exposure score of 47.2%
  - Donabate has an exposure score of 44.6%
  - Kinsealy – Drinan has an exposure score of 28.8%.

Dublin Airport was particularly vulnerable economic contributor due to the international travel restrictions and decline in passenger numbers. As an

## 6 Emerging Trends – Economy and Employment

essential service Dublin Airport continued to operate and facilitated the importation of personal protective and other medical equipment, facilitating the arrival of 6.2 million tonnes of equipment on 357 separate cargo flights, operated by 16 different airlines. Further two rapid COVID-19 testing facilities opened at Dublin Airport in November 2020.

However, many employees at Dublin Airport (i.e. airline, airport and associated service support staff for other entities operating there) both living in and adjacent to Fingal have also been working less hours, furloughed and offered voluntary redundancies and career breaks due to the impact of COVID-19. Whilst the Pandemic Unemployment Scheme and associated Government supports have been available to those in need, it is unclear how COVID-19 may impact Dublin Airport in the long term.

The impacts of COVID-19 have also been felt more broadly by many businesses and sectors. As illustrated in Figure 6-1, the Central Bank of Ireland has found that the range of businesses taking payment breaks varies greatly across sectors and scale

	SME			Large Corporate			All firms		
	OB (€m)	PB (€m)	PB(%)	OB (€m)	PB (€m)	PB(%)	OB (€m)	PB (€m)	PB(%)
A – Agriculture, Forestry & Fishing	2,443	146	6.0	1,075	50	4.6	3,519	195	5.6
C – Manufacturing	1,493	289	19.4	2,062	139	6.7	3,555	428	12.0
F – Construction	471	78	16.6	709	46	6.5	1,180	124	10.5
G – Wholesale & Retail	2,559	625	24.4	1,292	197	15.3	3,852	822	21.3
H – Transportation & Storage	683	202	29.5	709	37	5.2	1,392	238	17.1
I – Accommodation & Food	2,506	1,475	58.9	1,113	219	19.7	3,619	1,695	46.8
J – Information & Communication	255	28	11.0	182	10	5.4	437	38	8.7
L – Real Estate	7,104	1,234	17.4	2,937	278	9.5	10,041	1,512	15.1
M – Prof., Technical & Scientific	560	133	23.7	275	18	6.5	835	151	18.0
N – Administrative & Support Services	936	248	26.5	298	21	7.1	1,234	269	21.8
P – Education	274	39	14.3	223	10	4.5	496	49	9.9
Q – Human Health	1,071	260	24.3	764	84	11.0	1,835	344	18.7
R – Arts, Entertainment & Recreation	247	111	44.8	370	18	4.8	617	129	20.8
S – Other Services	378	126	33.3	261	67	25.6	638	192	30.1
Other	202	41	20.1	797	1	0.2	999	42	4.2
	21,181	5,034	23.8	13,068	1,194	9.1	34,248	6,228	18.2

Figure 6-1: Overview of payment breaks (PB) on outstanding balances (OB) by sector in Ireland to May 2020 (Source: Central Bank of Ireland 2020)

This has also filtered down to households as illustrated by the range of private dwelling house (PDH) borrowers and buy to let borrowers that took payment breaks on their mortgage as illustrated in Figure 6-2. Specifically, this relates to those mortgages at the five major retail banks, however this group covers over 67,000 accounts and €9.4billion balance and it indicated that PDH borrowers are slightly more likely to have payment breaks than buy-to-let borrowers.

## 6 Emerging Trends – Economy and Employment

	Accounts	Payment breaks	%	Balance (€ bn)	Payment break balance (€ bn)	%
<b>Total</b>	<b>748,249</b>	<b>73,960</b>	<b>10</b>	<b>94.94</b>	<b>10.46</b>	<b>11</b>
PDH: First-time buyer	248,794	23,804	10	35.47	3.60	10
PDH: Second-time/subsequent buyer	425,383	43,530	10	49.19	5.79	12
Buy-to-let	74,072	6,626	9	10.28	1.08	10

Figure 6-2: Payment breaks of mortgages by borrower type to end of May 2020 (Source: Central Bank of Ireland 2020)

Overall, the significant impact on COVID-19 on socio-economic circumstances has been evident nationally and in Fingal. The legacy of the COVID-19 shock is still substantial and is likely to impact the domestic economy and labour market for some time. Further, continued restrictions will exacerbate impacts the more vulnerable such as the elderly, those living alone, socially isolated, out of work and/or those on financial supports.

The future of COVID-19, associated direct and indirect social, economic and socio-economic impacts on individuals, communities, businesses and employees is unclear, but it is evident that all policy should be agile and flexible to respond to COVID-19 or indeed any other future pandemics that may occur such that impacts within Fingal can be minimised in so far as practicable through advisory, upskilling and socio-economic initiatives.

### 6.1.1 Employment Impacts

The CSO have published statistics on the business impact of COVID-19 survey from July to August of 2020. This survey<sup>21</sup> indicates that just 63.3% of responding enterprises continue to trade at normal capacity, with a further 33% only trading at partial capacity. This has likely to a contraction of the active labour force for both full and part-time labourers. In absence of employment many have qualified for the temporary wage subsidy scheme (TWSS) and pandemic unemployment payment (PUP).

Whilst the count of trading businesses to not equate directly to persons employed there is a likelihood that the decline in businesses in operation is reflective of employment. The seasonally adjusted national unemployment rate has reached 5.8% as of February 2021 with 140,800 persons unemployed. This rises to 24.8% if adjusted for COVID-19 – where claimants of the PUP are classified as unemployed.

<sup>21</sup> <https://www.cso.ie/en/releasesandpublications/er/bic19/businessimpactofcovid-19survey27julto23aug2020/>

## 6 Emerging Trends – Economy and Employment

The CSO have published further statistics on the impact of COVID-19 on sectoral employment from Q1-Q3 of 2020<sup>22</sup>. The impacts on specific industries nationally as relates to Fingal are notable with the following sectors affected primarily; financial, insurance and real estate (K-L), administrative and support services (N), and professional, scientific and technical activities (M). Notably however these industries were some of the least affected during periods of restriction and therefore is not likely reflective of the present sectoral environment (ongoing restrictions as of March 2021).

Given Fingal’s sectoral employment profile as set out in Section 4.1.8.1, residents are primarily employed in commerce and trade, professional services and transport and communications which have a significant degree of overlap with the industries affected as detailed in Table 6-1 such as professional, scientific and technical activities and administrative and support services. It is likely therefore that Fingal’s local employment will be significantly impacted by continued restrictions.

Table 6-1 CSO Labour Market Bulletin – Sectoral Employment Impacts (2020 Q1-Q3)

	<b>Economic Sector</b>	<b>Q1 - Q2</b>	<b>Q2 - Q3</b>	<b>Q1 - Q3</b>
B-E	Industry	-6.5%	1.3%	-6.4%
F	Construction	-11.3%	15.2%	3.2%
G	Wholesale and retail trade; vehicle repair	-4.9%	3.4%	-2.0%
H	Transportation and storage	-4.4%	4.2%	-3.2%
I	Accommodation and food services	-14.0%	10.6%	0.4%
J	Information and communication	-6.0%	6.1%	-0.5%
K-L	Financial, insurance and real estate	-9.5%	-0.9%	-11.9%
M	Professional, scientific, and technical activities	-9.0%	1.8%	-7.8%
N	Administrative and support services	-14.9%	1.9%	-13.2%
O	Public administration and defence	1.1%	-1.1%	0.3%
P	Education	-0.5%	-0.9%	-0.5%
Q	Human health and social work	-1.4%	-0.2%	-1.1%
R-S	Arts, entertainment, recreation and other	-10.7%	4.5%	-5.4%
All	All Sectors	-5.8%	2.1%	-3.9%

<sup>22</sup> <https://www.cso.ie/en/releasesandpublications/br/b-lfs/labourmarketinsightbulletinseries4q32020/>

## 6 Emerging Trends – Economy and Employment

### 6.2 Brexit

On 23 June 2016, the UK voted to leave the EU in a referendum and after a number of delays and extensions, the UK departed on 31 January 2020. The UK was then in a transition period and since 1 January 2021, a Trade and Cooperative Agreement has been provisionally applied (until fully reviewed by the European Commission). This governs matters that were previously dealt with under EU law including trade of goods, movement of people as well as a Protocol on Ireland and Northern Ireland which is of particular relevance to Fingal given proximity and strategic location along the Belfast-Dublin travel corridor.

A range of Brexit related shocks and stresses have been identified by various entities nationally and some of the key consequences to take note of in relation to socioeconomics include:

- The Common Travel Area between Ireland and the UK continues to be recognised along with the rights it grants to Irish. British citizens continue to have the right to live and work in Ireland and the same applies to Irish citizens who wish to continue living in the UK. For other EU citizens, the UK has set up an EU Settlement Scheme, under which EU citizens (from countries other than Ireland) and their family members living in the UK can apply to continue living there after 30 June 2021.
- A frontier worker is a person who lives in one country but works in another country. For instance, if you live in the Republic of Ireland and work in Northern Ireland, you are a frontier worker. A Frontier Work Permit or visa may be necessary to work in the UK from 1 January 2021; however, this does not apply to Irish citizens as they are protected by way of the Common Travel Area.
- The current arrangements for social security between Ireland and the UK have not changed.
- Irish businesses have quota and tariff free access to the UK – this is a key benefit of the deal.
- Special rules for trading in goods apply to Northern Ireland, which ensures that Northern Irish businesses can continue to trade with the EU on a tariff free basis without any customs declarations or border checks whilst also enjoying access selling into the British market. Goods moving between Ireland and Northern Ireland will not have any customs, tariffs, or other restrictions placed on them. However, goods moving from Northern Ireland to another part of the UK and vice versa now require additional paperwork and checks.

## 6 Emerging Trends – Economy and Employment

- There are non-tariffs costs on trade between the EU and the UK. This results in more forms to be filled in, more tests and new labelling requirements for many products. There is also time and cost involved in getting used to the new rules and putting new systems and processes in place.
- The Rules of Origin have been modified – these determine if a good qualifies for tariff free treatment. Many businesses have already seen these rules may require them to reconfigure their supply chain.
- Purchasing goods online from the UK has become more expensive and complicated. This is due to additional import and Value Added Tax charges and it should be noted that EU consumer protection legislation no longer applies, and one's consumer rights are in accordance with UK law.
- The lack of extensive detail on the provision of services between the EU and the UK. This will depend on the nature of the service and on what agreements are reached in the future between the professional bodies in the UK and each EU country on the recognition of professional qualifications. It should be noted that there are provisions for specific sectors including aviation, energy, fishing and road transport however there is little on others such as financial services.
- There is an extensive new governance framework involving the establishment of a Partnership Council and many new Committees and Working groups to oversee the implementation of the agreement.
- There are provisions dealing with State Aid and what has become known as Level Playing Field conditions in areas such as labour laws, environmental standards and taxation, with specific provisions to deal with disputes in relation to these matters, however only time will tell how they operate in practice.
- Further agreements may be needed in the future to deal with Brexit. Specifically, the Trade and Cooperation Agreement itself will be reviewed every 5 years, with the first general review taking place by end 2025.
- In Northern Ireland, the long term application of the Protocol is up to the Northern Irish Assembly. Every four years after the end of the transition period, the Assembly can vote on whether it wants EU law on things like custom, duties and regulations, to continue or not. If they vote to end any part of the Protocol, the decision will come into effect two years later.

### 6.2.1 [Brexit Indicators](#)

The CSO assess the economic relationship with the Republic of Ireland and United Kingdom through a series of 'Brexit Indicators' following the UK leaving the European Union. These indicators relate to; trade in goods and services, employment, migration, outbound travel and inbound travel. Whilst these

## 6 Emerging Trends – Economy and Employment

statistics represent national trends, it is important to consider the impact for Fingal specifically given its position as a key link between Ireland and the UK within the Dublin-Belfast Corridor and containing Dublin Airport. The short term and long term impact of Brexit remains uncertain given lack of statistical evidence, however recent statistics since the outset of Brexit negotiations provide context to likely trends.

### Trade in Goods

- UK sourced goods account for 21.4% of national imports as of December 2020 equating to €1,750,396 thousand. Throughout 2020 the proportion of goods imported from the UK has grown considerably from 21.8% to 22.9% indicating growth in imports until the end of the calendar year. No data is available for 2021.
- Exports to the UK account for 10.6% of total exports as of December 2020 equating to €1,251,915 thousand. Throughout 2020 exports to the UK decline significantly from 10.2% to 9%.

### Trade in Services

- UK sourced services account for 6.9% of national service imports as of 2019 equating to €20,552 million. Throughout the last decade the proportion of services imported from the UK has fluctuated considerably with general decline from 14% to 6.9%. No data is available for the 2020-2021.
- Exports to the UK account for 15.8% of total exports as of 2019 equating to €34,897 million. Throughout the last decade the proportion of services exported to the UK has fluctuated considerably with general decline from 20.2% to 15.8%.

### Employment

- UK nationals account for 2.4% of those employed in Ireland (2019)
- Since 2017 the number of UK nationals employed in Ireland has seen growth of 0.1% as a proportion of foreign nationals employed.

### Migration

- **Emigration**
  - 17.7% of Irish migrants emigrated to the UK in 2020 accounting for 10,000 people.
  - There is an evident downward trend in the number of emigrants to the UK over the last decade with a decline from 22.1% in 2010 to 17.7% in 2020. This in absolute terms is a decline of roughly 12,700 people.

## 6 Emerging Trends – Economy and Employment

- **Immigration**
  - 17.9% of immigrants to Ireland originate in the UK equating to 15,300 people in 2020.
  - There has been a consistent growth since 2012 (17.6%) in UK immigrants until 2019 (22.2%) with a sharp decline thereafter to 17.9% in 2020 likely due to travel restrictions with 15,300 immigrants coming from the UK.
- **Outbound Travel**
  - Trips to the UK from Ireland account for 29.2% of all external flights as of 2019 with 608,000 trips. These trips are typically for lower fares and account for 15.6% of expenditure on flights at €257.5m.
  - While the proportion of external flights to the UK has declined between 2017 and 2019, in absolute terms there has been a 21% increase in the number of trips.
- **Inbound Travel**
  - Trips to Ireland from the UK account for 38.3% of all inbound flights as of 2019 with 928,300 trips. These trips are typically for lower fares and account for 22.3% of expenditure on flights at €223m.
  - The proportion and absolute number of inbound flights from the UK has declined between 2017 and 2019 from 22.1% of inbound flights to 19.2%.

## 6 Emerging Trends – Economy and Employment

### 6.3 Infrastructure Development

There are a range of forthcoming local infrastructure interventions as well as Strategic Infrastructure Developments that will impact and influence employment and accessibility within, to and from Fingal over the coming years. These developments will accommodate increasing travel demand, alleviate existing issues and help Fingal transition towards sustainable mobility in accordance with overarching policy. Various infrastructure projects will deliver change in employment commuter patterns through the provision of a dedicated automated metro, additional railway and redesigned bus network respectively. Further, the delivery of the metropolitan cycle network along with local interventions such as cycleway improvements, (particularly along the coastline), Snugborough and Donabate Bridges along with targeted measures in Balbriggan and Swords town centres.

MetroLink is the planned high capacity, high-frequency metro railway line running for 19km both over ground and underground that is being progressed by Transport Infrastructure Ireland. It stretches from Swords in the north, toward the Airport, Glasnevin, city centre and onwards to Charlemont in the south of the city. An overview of the route is provided in Figure 6-3 for information. MetroLink will also be served by some Park and Ride destinations including one at Estuary (to the north of Swords). This network will therefore serve Dublin Airport, Irish Rail, DART, Dublin Bus and Luas services and connect key destinations including Ballymun, the Mater Hospital, the Rotunda Hospital, Dublin City University and Trinity College Dublin. MetroLink is anticipated to carry up to 50 million passengers annually. It is anticipated that the application for MetroLink will be submitted to An Bord Pleanála in August/September 2021. The introduction of this transportation link will greatly improve accessibility for employment hubs all across Fingal and Dublin City Centre.

## 6 Emerging Trends – Economy and Employment



Figure 6-3: Overview of MetroLink (Source: Transport Infrastructure Ireland)

DART+ is a programme of projects being progressed by Irish Rail that aims to modernise and improve existing rail services in the Greater Dublin Area. It will provide a sustainable, electrified, reliable and more frequent rail service, improving capacity on rail corridors serving Dublin. The current DART network will be increased to 150km of railway corridor through the electrification and upgrade of existing lines along with the purchase of new train fleet. Specifically the DART+ Programme will deliver frequent, modern, electrified services to from Dublin City Centre (Connolly and Spencer Dock) to Maynooth and M3 Parkway; Hazelhatch and Celbridge; Drogheda; and Greystones with an overview provided in Figure 6-3. Of particular relevance is the Maynooth Line and M3 Parkway

## 6 Emerging Trends – Economy and Employment

which is scheduled to be applied for in 2021 and the DART Coastal line which is currently scheduled to be applied for in the second half of 2022.

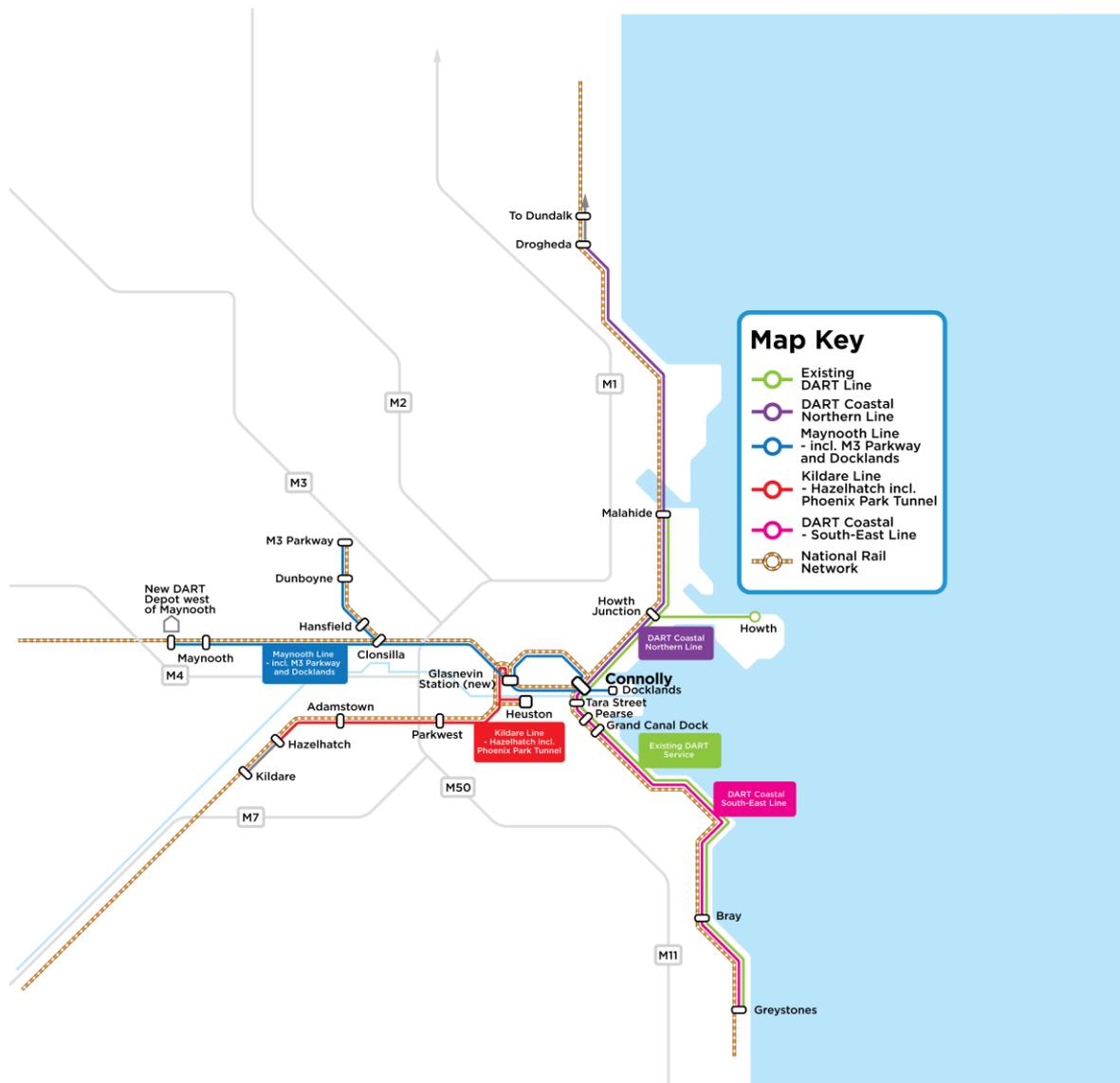


Figure 6-4: Overview of DART+ Programme (Source: Irish Rail)

## 6 Emerging Trends – Economy and Employment

BusConnects is the National Transport Authority's programme to greatly improve bus services in Irish cities and within Dublin this comprises the following nine elements:

- A network of next generation bus corridors – over 230km of bus lanes (and 200km of cycle tracks/lanes) to make journeys faster and more reliable;
- A complete redesign of the bus network – to provide a more efficient network with high frequency spines, new orbital routes and increased bus services;
- State-of-the-art ticketing system – to provide a simpler, more modern, more convenient and more integrated ticketing system;
- Transition to a cashless payment system – to streamline and speed up the process of paying for bus journeys;
- A simpler fare structure – to make movement between different bus services and between buses and other transport modes, seamless and easy, without financial penalty;
- Park & Ride facilities - to enable those travelling longer distances to make part of the journey by car, then leave the car in a dedicated car park and complete the journey by bus;
- New bus livery – providing a common style across different operators that conveys the image of a modern, effective transit system;
- New bus stops and shelters – with better route and fare information provided in each case and with timetable information specific to each stop; and
- Low emission vehicles – to contribute to Ireland's climate change targets by transitioning to a lower emission bus fleet.

A number of spine routes (i.e. most frequent, high capacity routes) will serve Fingal and connect to a number of orbitals (i.e. routes that operate around the city), other city bound (or radial) routes, local routes as well as peak and express routes as per Figure 6-5. Specifically, in Fingal the A spine will connect with Swords. Blanchardstown is planned to be connected via the B spine whilst the H spine will connect to Sutton, Howth and Portmarnock. It is anticipated that the application for BusConnects will be submitted to An Bord Pleanála in 2021 and it will be implemented on a phased basis across Dublin.

## 6 Emerging Trends – Economy and Employment

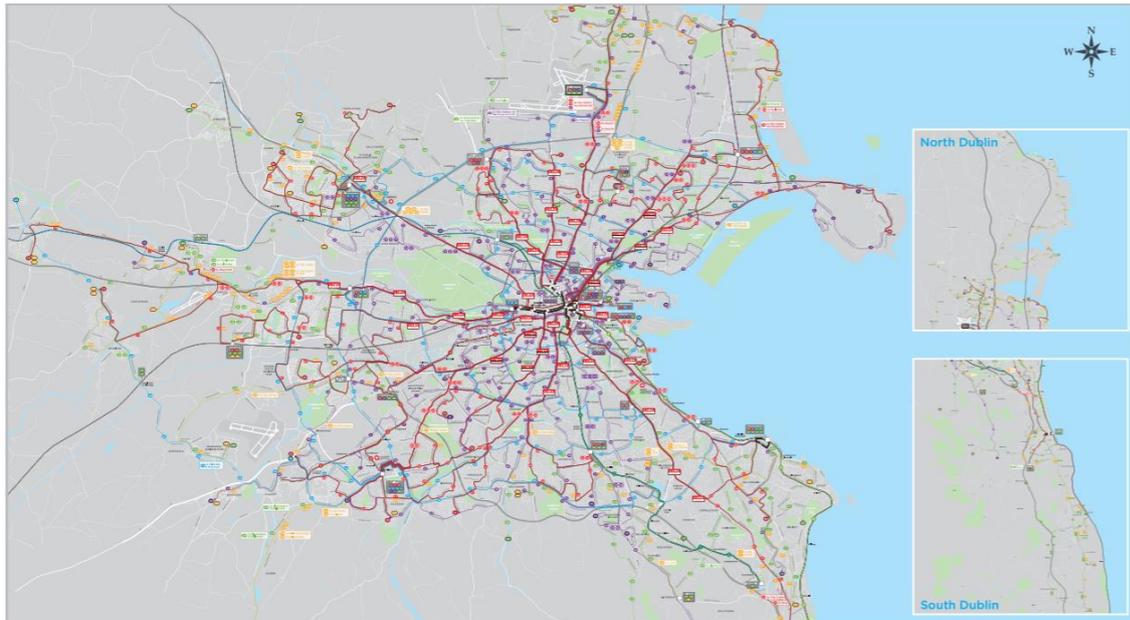


Figure 6-5: Overview of BusConnects (Source: National Transport Authority)

There are also a range of local interventions across the various settlements and rural areas in Fingal that will impact on employment, travel trends, commuting, movement and connectivity over the coming years. The future development of high density residential and commercial areas across Fingal will also impact on travel within and across Fingal along with local targeted infrastructure and mobility measures.

For instance, in February 2020 Fingal became the first local authority in Ireland to launch a 'Mobility Hub' to support accessible and sustainable travel. The hub on Main Street, Blanchardstown comprised five parking bays with specific colour-coordinated functions including age-friendly, disabled, electric vehicle charging, bike rack (bike share and public) and car sharing. The aim is to encourage varied and sustainable types of transport in areas that are close to existing public transport links with high concentration of employment, housing, shopping, amenities and recreation. Additionally, New Street in Malahide was pedestrianised during the summer of 2020 as part of a trial to help businesses continue trading.

At a more strategic level, the Department of Housing, Local Government and Heritage has awarded funding under the Urban Regeneration and Development Fund for the following:

- Sustainable Swords received funding in November 2018 to produce a place-making strategy focused on the strategic regeneration and compact development of Swords, in order to increase resilience of the local economy and to provide for an enhanced, accessible, inclusive, child-friendly and

## 6 Emerging Trends – Economy and Employment

healthy urban environment. Work is ongoing with further recommendations expected in 2022 with targeted action to be implemented thereafter.

- Our Balbriggan Rejuvenation Plan received €24.5million funding in March 2021 to help realise eight projects therein and support public realm improvements. The projects are Quay Street, Harbour, 2/4 Dublin Street, Bridge Street, Railway Street, Millpond Park, Promenade and Coastal Improvements along with the Castle to Castle Cycleway and the delivery will be phased with the first three projects scheduled for completion by 2023 and Bremore Regional Park, the Fingal Coastal Way and Bridge Street is expected to be finished by 2026. Thereafter the rejuvenation of Railway Street and Millpond Park is scheduled to be completed by 2027.

Separately, Fingal County Council has also been awarded funding from the Department of Rural and Community Development for projects including:

- €190,000 awarded under the 2020 Town and Village Renewal Scheme to support projects in St. Margaret's, Balrothery, Rolestown and Lusk. €21,600 is allocated to upgrade Broadband Connection Points to facilitate remote working and digital access for the local population in Rolestown and Lusk (Man O War). €99,000 for Balrothery will allow for the development of new walking and cycling facilities, together with enhanced streetscape measures whilst St. Margaret's will benefit from €69,525 to improve the local area with the development of a new green area with improvements to heritage assets and access in the village.
- €68,375 allocated in July 2020 under the Community Enhancement Programme towards enhancing the facilities available to communities at a smaller scale including projects which range from purchasing lawnmowers and IT equipment to minor renovations to buildings.

Fingal County Council will receive almost €15million funding from the National Transport Authority to support walking and cycling infrastructure. This funding will help progress 23 projects across the county including the following:

- Donabate Estuary Walking and cycling route, Broadmeadow way: €750,000
- S2S Extension Sutton to Malahide: €310,000
- Royal Canal Cycle Route - entire Fingal route: €400,000
- Harry Reynolds Road Cycle Track: €1,600,000
- Snugborough Road N3 Overbridge (Part-Funded): €2,000,000
- Swords Cycle Network: €100,000
- Schools Streets Fingal Pilots: €150,000
- Donabate Bridge: €400,000

## 6 Emerging Trends – Economy and Employment

- Bicycle Parking (COVID): €125,000
- Safe to Schools Programme – infrastructure: €100,000
- 2020 Stimulus Programme - Contractual Liability: €4,000,000
- Churchfield Road: €2,000,000
- Snugborough Road - National Aquatic Centre to Ongar: €100,000
- Baldoyle to Howth: €1,000,000
- Dublin Road to Dublin Street Baldoyle: €1,000,000
- Donabate Hearse Road/Main Street/Portrane Road (Link 1 & Link 2): €100,000
- Damastown to Clonsilla Cycle Route including N3 bridge: €150,000
- Clonee to Blanchardstown Shopping Centre: €100,000
- Swords Estuary to Rathbeale Road: €100,000
- Malahide (Main Street) to Swords (Brackenstown Road): €100,000
- Forest Road to Swords Main Street: €100,000
- Bus Related infrastructure (interchange, Little Pace Road): €85,000
- R132 Design (junctions): €100,000

Overall, there is therefore a range of infrastructure and strategic development forthcoming that will impact and influence future employment trends across and within Fingal. It is anticipated that all policy and strategic development will support and integrate sustainable accessibility to many existing and future developed employment hubs. Transport and infrastructure interventions are expected to facilitate the modal shift in alignment with the policy hierarchy and national, regional and local objectives such that they encourage sustainable ways of improving Fingal's integration, connectivity and the movement of workers.

## 7 Summary

### 7 Summary

#### 7.1 SWOT

A SWOT analysis has been undertaken to evaluate the strengths, weaknesses, opportunities and constraints for Fingal as they relate to factors such as its geographic location, the baseline socioeconomic assessment, employment, land-use zoning, enterprise, sectoral performance and emerging trends.

Strengths	Weaknesses
<p><b>Geographic</b></p> <ul style="list-style-type: none"> <li>• Dublin-Belfast corridor</li> <li>• Dublin Airport</li> <li>• Significant tourism potential for coastal towns and green and blue infrastructure</li> <li>• Evident growth in population and employment opportunity in Swords, Balbriggan, Portmarnock, Malahide and Skerries.</li> </ul> <p><b>Baseline</b></p> <ul style="list-style-type: none"> <li>• Strong population growth</li> <li>• Young population profile</li> <li>• Large projected labour force growth by 2026</li> <li>• Well educated labour force</li> <li>• Diversity of nationality, birthplace, and ethnicity</li> <li>• High employment rate prior to COVID-19 pandemic</li> </ul> <p><b>Zoning</b></p> <ul style="list-style-type: none"> <li>• Dublin Enterprise Zone: a significant national economic asset</li> <li>• Adequate industrial zoning in a majority of settlements</li> <li>• Adequate industrial zoning for the forthcoming development plan (by total volume)</li> <li>• Lower than national average vacancy rate.</li> </ul>	<p><b>Geographic</b></p> <ul style="list-style-type: none"> <li>• Dublin City has a significant pull on employment</li> <li>• Educational profile for Fingal residents may not fully match the employment opportunities in the county with a significant number of workers commuting to Dublin City for roles in ABC professional industries.</li> <li>• Underutilisation of rural northwest of Fingal</li> </ul> <p><b>Baseline</b></p> <ul style="list-style-type: none"> <li>• Significant transition requirement for Fingal AHS to align with NPF target of 2.5 by 2040</li> <li>• Reliance on cars for commuting for employment (60% commute to work via car)</li> </ul> <p><b>Employment</b></p> <ul style="list-style-type: none"> <li>• Current unemployment rate during COVID-19 pandemic</li> </ul> <p><b>Zoning</b></p> <ul style="list-style-type: none"> <li>• Higher commercial vacancy rate than the Dublin average</li> <li>• No land capacity for employment related zoning in Baldoyle, Malahide or Portmarnock.</li> </ul> <p><b>Enterprise</b></p> <ul style="list-style-type: none"> <li>• Reliance on aviation sector and Dublin Airport</li> <li>• Non tourism related Marine sector</li> </ul>

## 7 Summary

Strengths	Weaknesses
<p><b>Enterprise</b></p> <ul style="list-style-type: none"> <li>• Diverse sectoral base of enterprise that acts as a draw for 57,000 workers to come from outside of the county</li> <li>• Strong ICT and financial services sectors</li> <li>• Aviation sector (pre-COVID-19)</li> <li>• Tourism sector (pre-COVID-19)</li> <li>• Strong retail sector (pre-COVID-19)</li> </ul>	
Opportunities	Threats/Constraints
<p><b>Geographic:</b></p> <ul style="list-style-type: none"> <li>• Opportunities within the Dublin-Belfast Economic Corridor post-Brexit</li> <li>• Coastal town and marine sector growth to better leverage tourism, reduce leakage and maximise tourism expenditure</li> <li>• Continued investment and promotion of employment and enterprise development as a result of Dublin Airport</li> </ul> <p><b>Baseline:</b></p> <ul style="list-style-type: none"> <li>• Significant growth and scale of Swords and Blanchardstown</li> <li>• Very highly educated resident workforce likely to catalyse local enterprise development</li> </ul> <p><b>Employment:</b></p> <ul style="list-style-type: none"> <li>• Sectoral growth in higher value industries such as ICT and financial services</li> </ul> <p><b>Zoning:</b></p> <ul style="list-style-type: none"> <li>• NPF compact growth requirement</li> <li>• Lower commercial vacancy rate than the national average 3,000+ hectares of undeveloped employment zoned lands</li> <li>• Significant amount of agricultural land</li> </ul> <p><b>Infrastructure:</b></p> <ul style="list-style-type: none"> <li>• Metrolink, BusConnects, Dart+</li> <li>• Greenway developments for coastal towns and tourism</li> </ul>	<p><b>Trends:</b></p> <ul style="list-style-type: none"> <li>• The largest existential threats nationally and locally are COVID-19 and Brexit</li> <li>• The UK officially exited the European Union on the 31<sup>st</sup> December 2020, the ramifications of that exit have had immediate material impact on business, but the extent of change will not likely be understood into the medium term</li> <li>• COVID-19 is ongoing and likely to have a significant impact on employment and enterprise until 2022 at the earliest. It is unclear if there will be a material impact on Fingal for the CDP 2023-2029. In the immediate future there is a high degree of uncertainty</li> </ul> <p><b>Baseline:</b></p> <ul style="list-style-type: none"> <li>• Population is projected to grow into the future and housing completions must align with the pace of growth</li> <li>• Estimated 35,000 additional households by 2031</li> </ul> <p><b>Employment:</b></p> <ul style="list-style-type: none"> <li>• COVID-19 unemployment and temporary unemployment growth</li> </ul> <p><b>Zoning:</b></p> <ul style="list-style-type: none"> <li>• NPF compact growth requirement leading to higher density requirement</li> <li>• Decreasing average household size leading to larger land requirement</li> </ul>

## 7 Summary

- Broadband provision rollout under the National Broadband Plan
- Infrastructure developments all serving to; increase quality of life for residents, decentralise urban areas, decouple employment and residential areas where required, improve congestion.

### **Enterprise:**

- Remote working
- Coworking hubs with the potential to improve quality of rural employment landscape
- High employment rate prior to COVID-19 pandemic
- Retail sector online transition through 'digitisation'
- Data centres in the DEZ (Amazon etc.) opportunity for further expansion and development

### **Infrastructure:**

- Delay in provision of large-scale infrastructure developments

### **Enterprise:**

- Aviation, tourism and retail sectors threatened by COVID-19 restrictions
- Significant reduction in the number of actively trading enterprises as a result of continued restrictions
- Paradigm shift in the retail sector with a growing online presence requirement through digitisation

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## 7.2 Conclusion

This report has been prepared by KPMG Future Analytics on behalf of Fingal County Council to describe the economic and employment profile of Fingal and its land use based on the latest available data.

Fingal is spatially positioned with significant economic advantages given its position within the Dublin-Belfast economic corridor, proximity to Dublin City and Dublin Airport, comprehensive transport and utility infrastructure and balanced mix of urban, coastal and rural diversity.

This analysis indicates the gravity of the larger key settlements such as the Consolidated Metropolitan Area, Swords, Portmarnock, Balbriggan and Malahide in relation to the scale of economic growth and employment pull. The existing strength of these settlements has been established in the baseline component of this report in addition to potential growth given employment zoning capacity and related factors such as regional job targets and labour force growth as well as residential land capacity and population growth.

Population growth identified under the NPF implementation roadmap targets and subsequent labour force reduction indicates the significant growth for the future of Fingal leading to significant requirements for land use expansion and growth under the compact growth targets listed under the NPF. Under Labour force growth projections Fingal will increase its working population by 12.4% or 18,612 persons by 2029. Under the EMRA employment target of 320,000

## 7 Summary

additional jobs by 2040 there are 13,090 jobs locally forecasted in Fingal between 2020-2029. This level of forecasted employment growth will require an anticipated employment zoning capacity between 204 and 290 hectares within Fingal until 2029.

Functional Economic Areas and relative enterprise clustering play a significant part in understanding the distribution and colocation of enterprises and employment relative to the growth of towns and villages in the context of wider Dublin and regional trends. Fingal has a significant sway over regional employment as an enterprise centre.

Sectoral reviews of emerging and established industries in Fingal have indicated areas of growth in global, national and regional context where relevant. Many of these industries such as retail, ICT and financial services and manufacturing are dominant employers and strongly represented by enterprise across a majority of key settlements. A review of population growth and spatial distribution was applied in validation of the present retail hierarchy which generally aligned. These sectors are also seeing the most significant changes in terms of technological transition and adaptability given global trends caused by COVID-19 and Brexit.

The forthcoming Fingal Development Plan 2023 -2029 should have an awareness of the existing trends in terms of economy and employment, and also of the fluidity of the present circumstances.

# 7 Summary

## A Appendix

### A.1 Settlement Zoning

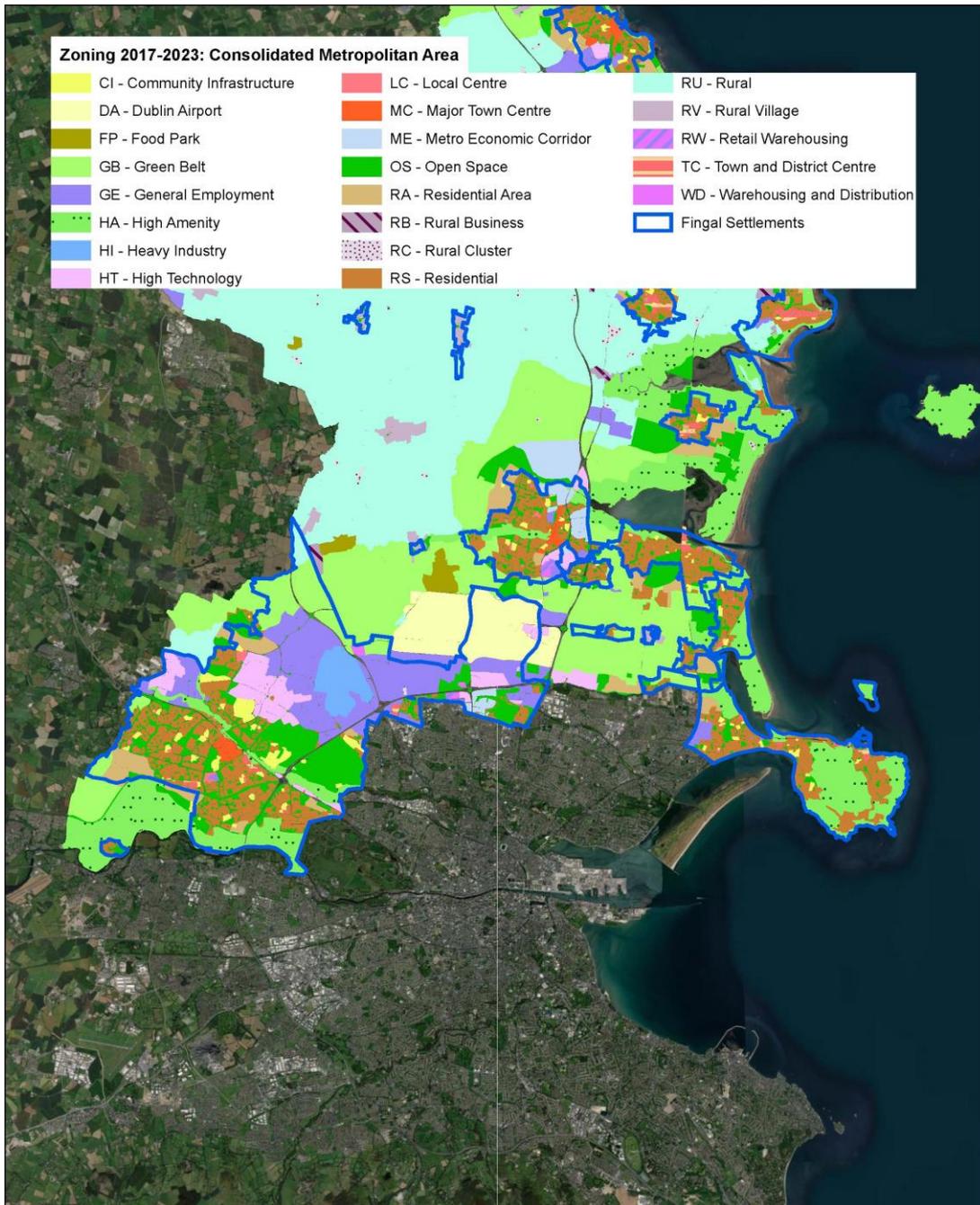


Figure 7-1 Consolidated Metropolitan Area Zoning

# 7 Summary

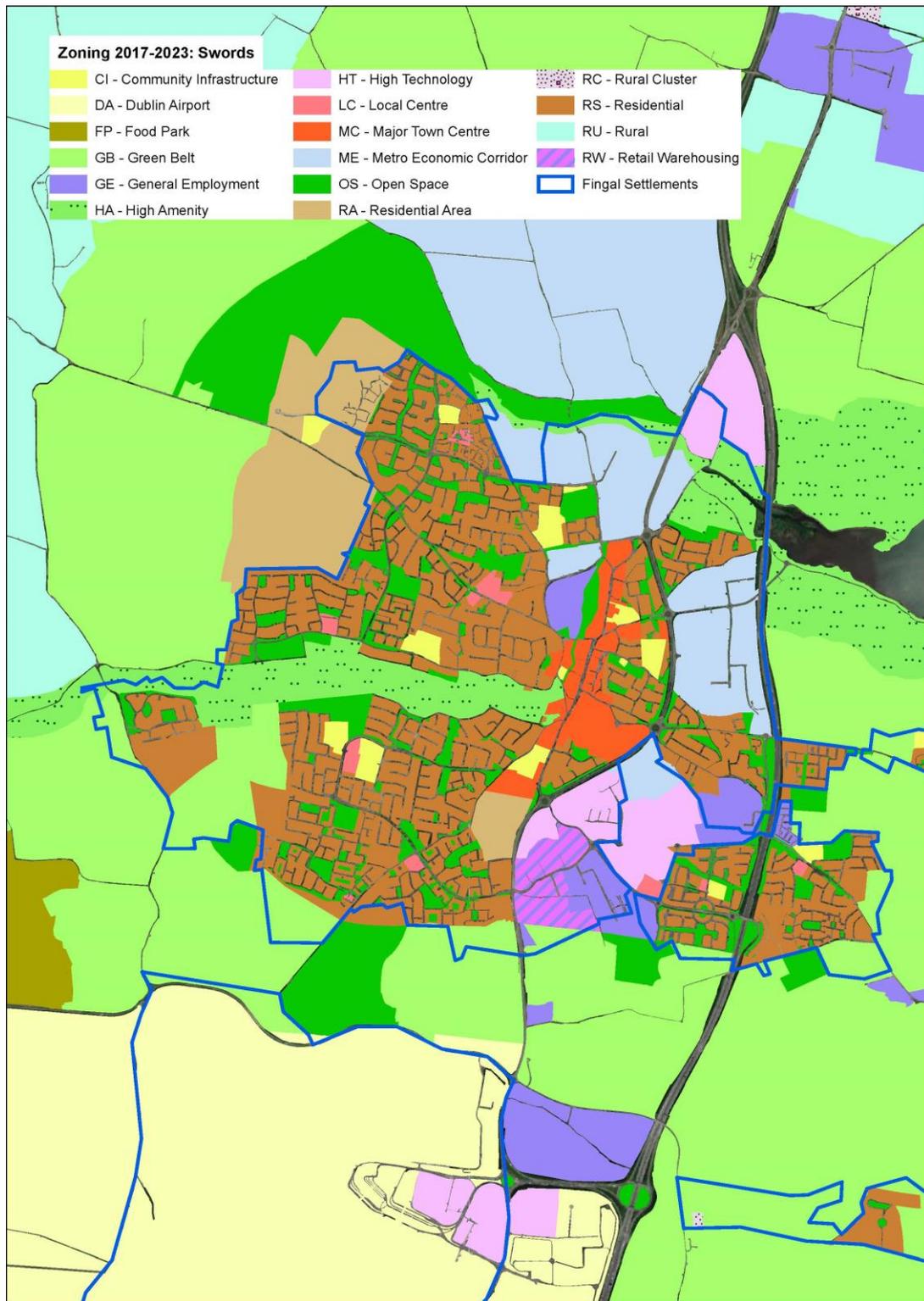


Figure 7-2 Swords Zoning

# 7 Summary

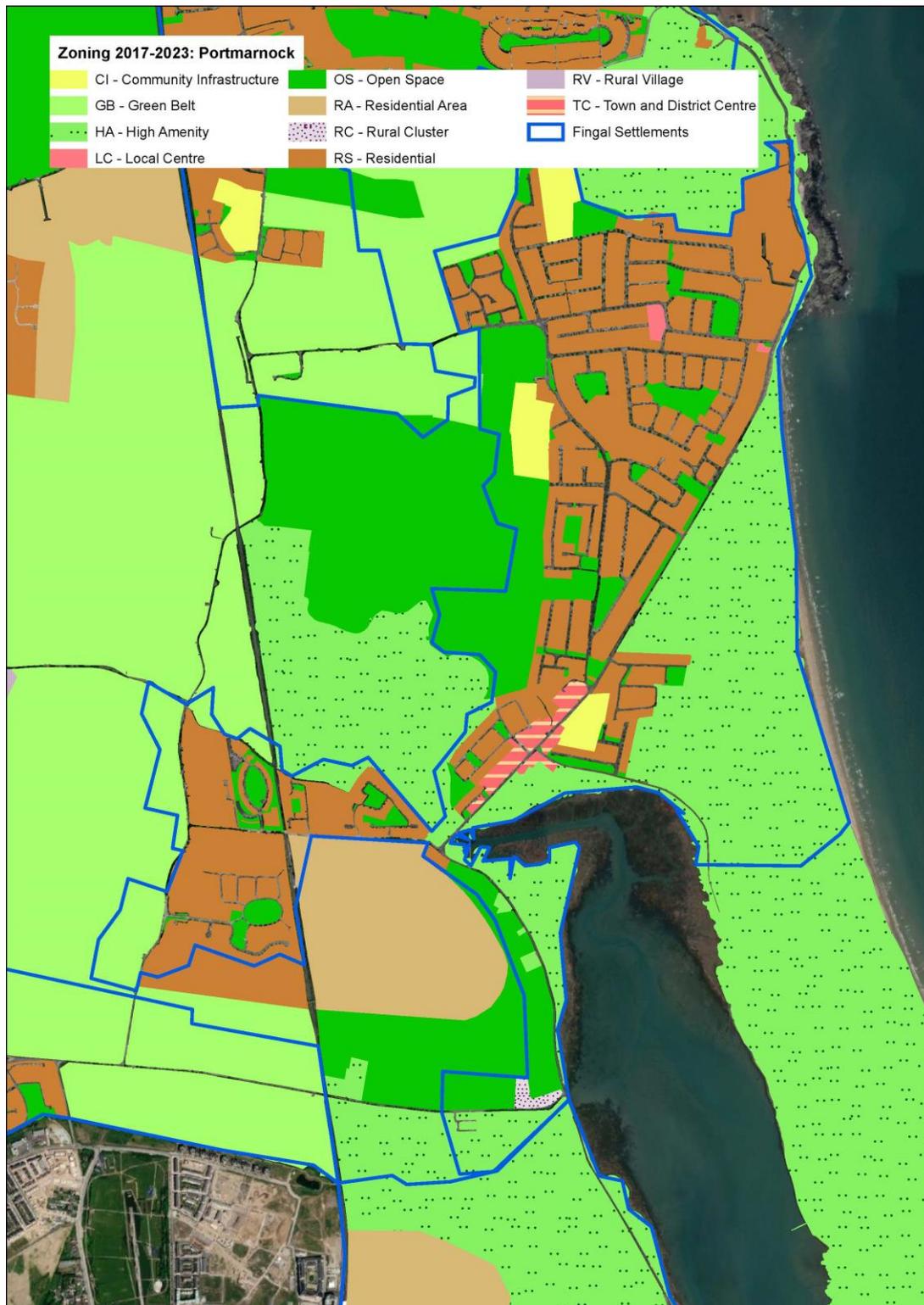


Figure 7-3 Portmarnock Zoning

## 7 Summary

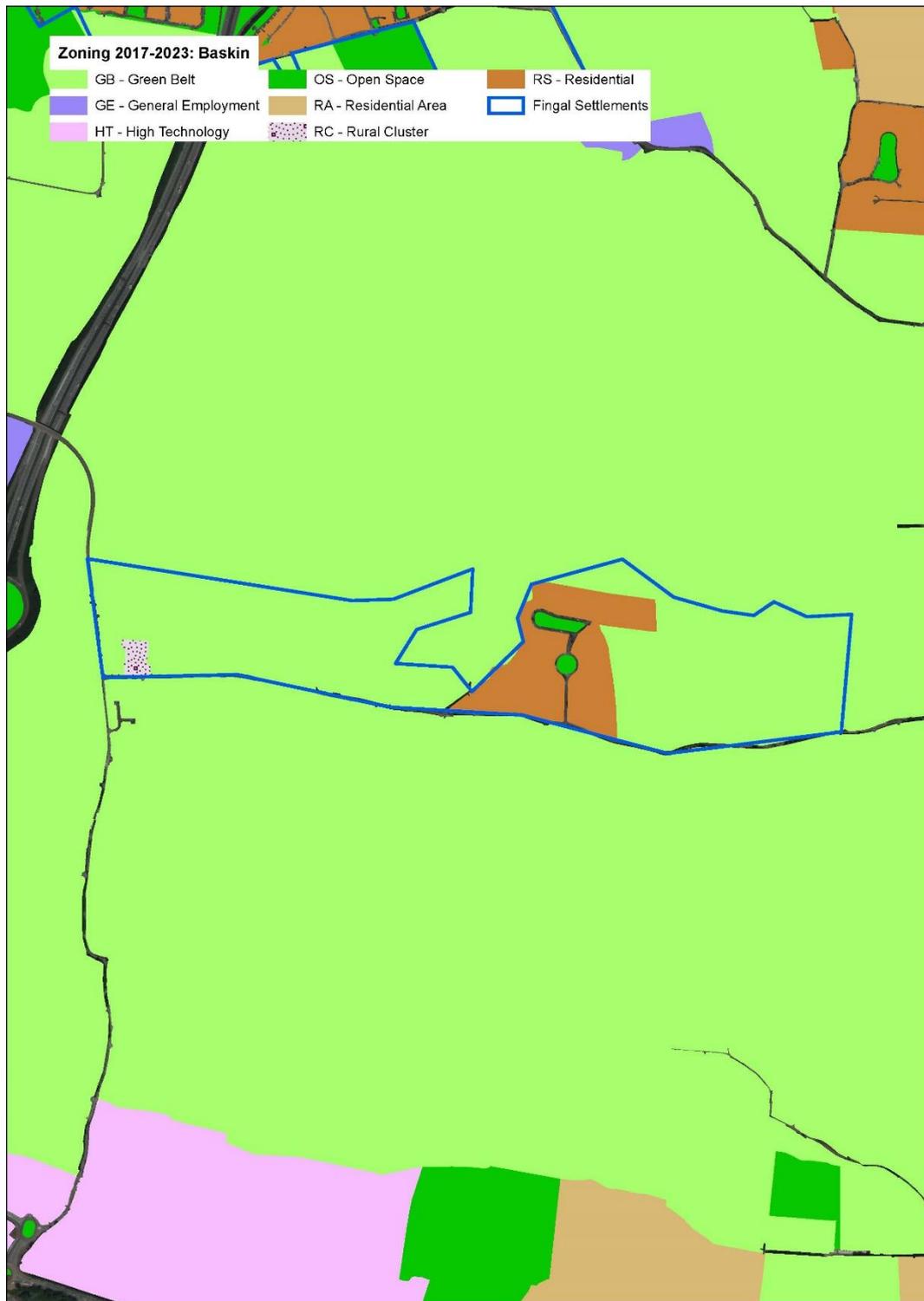


Figure 7-4 Baskin Zoning

## 7 Summary

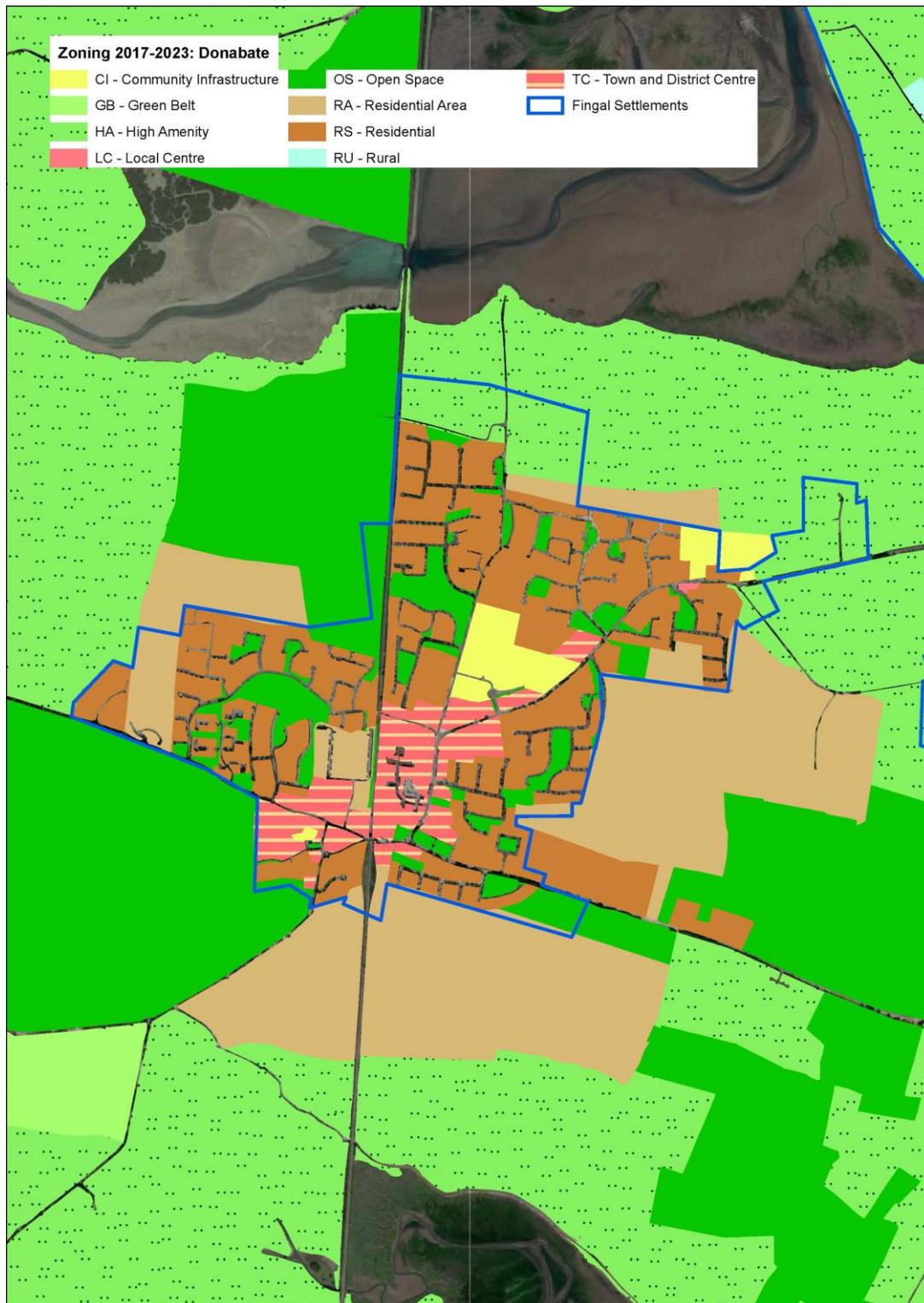


Figure 7-5 Donabate Zoning

# 7 Summary

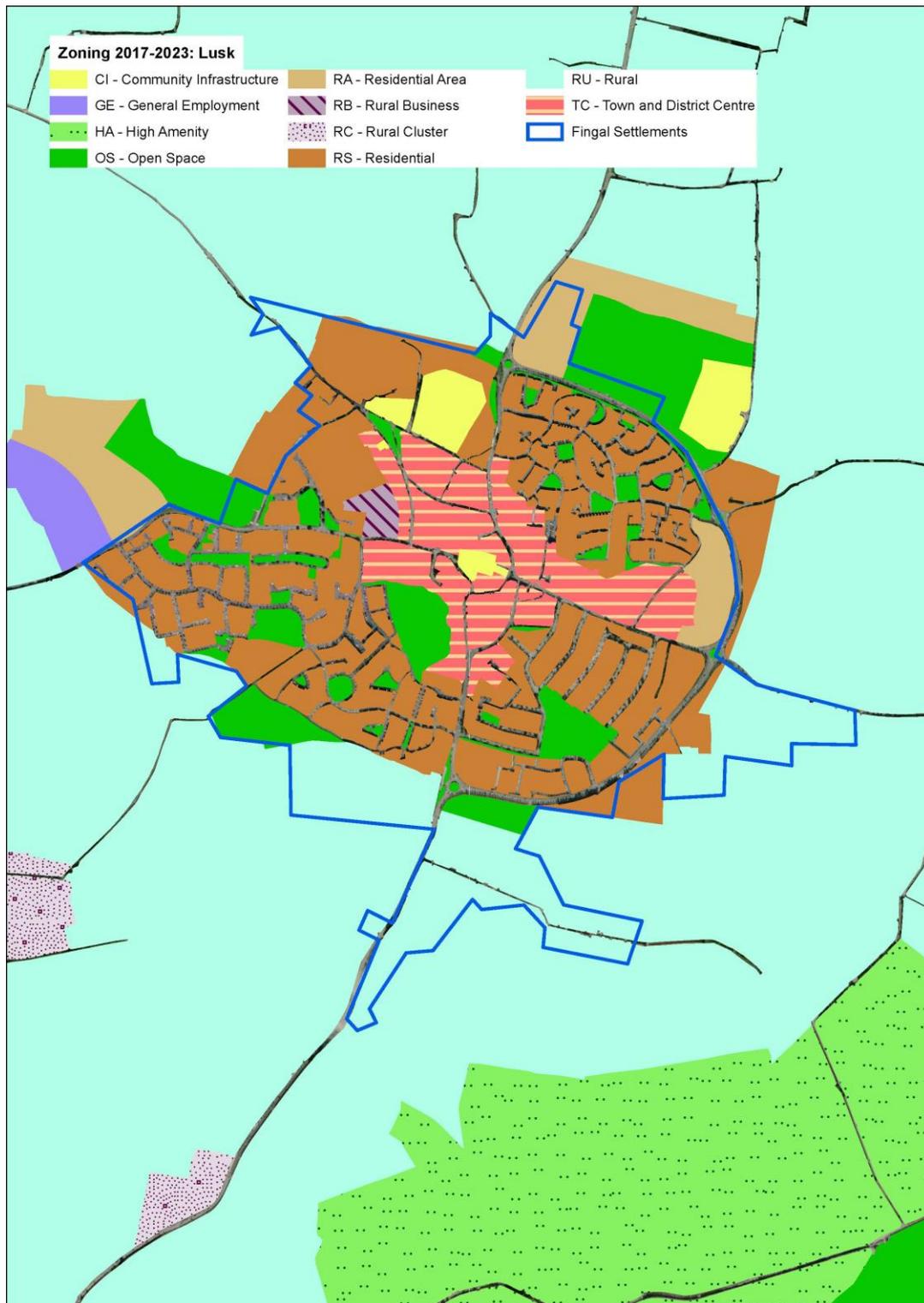


Figure 7-6 Lusk Zoning

# 7 Summary

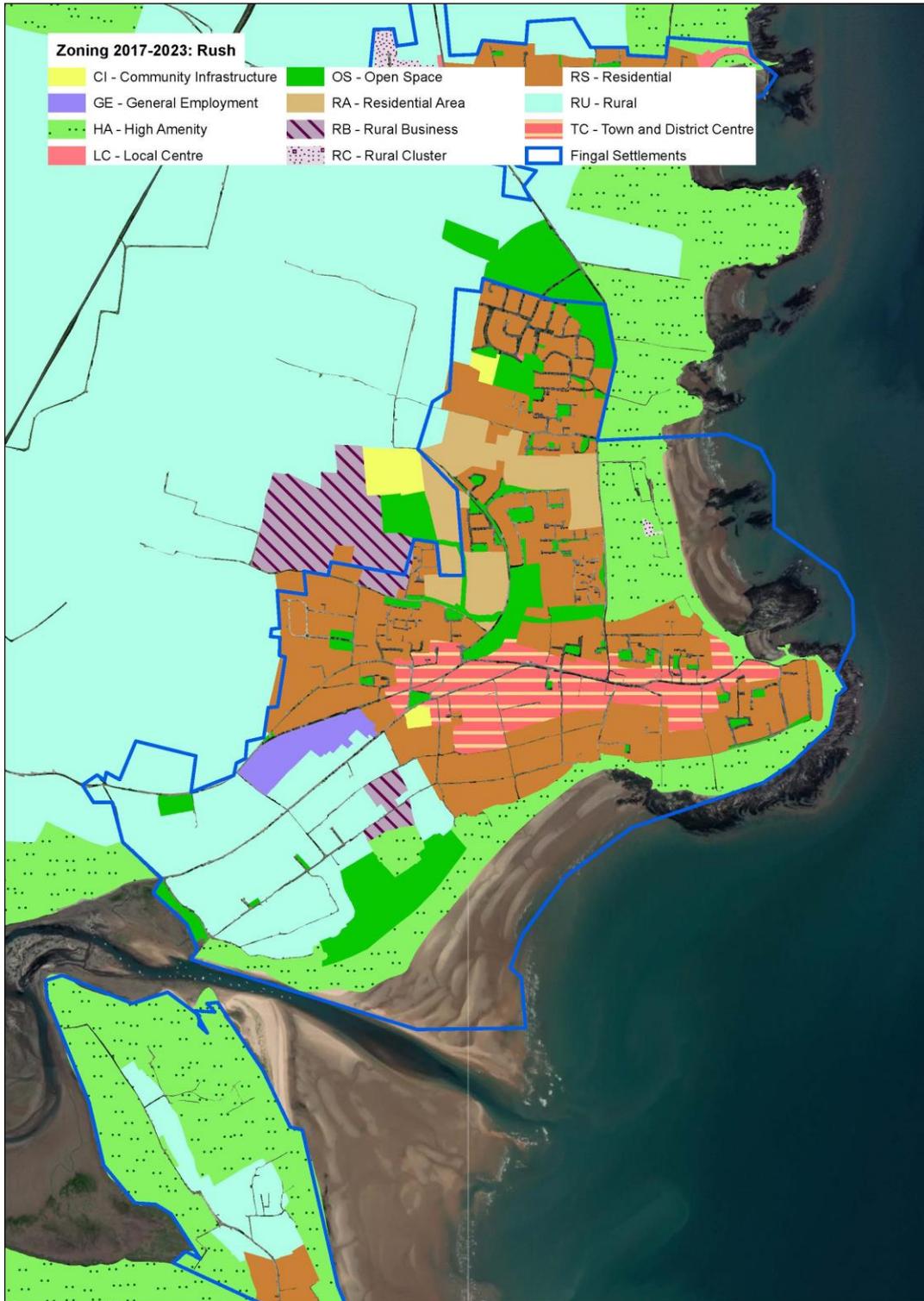


Figure 7-7 Rush Zoning

## 7 Summary

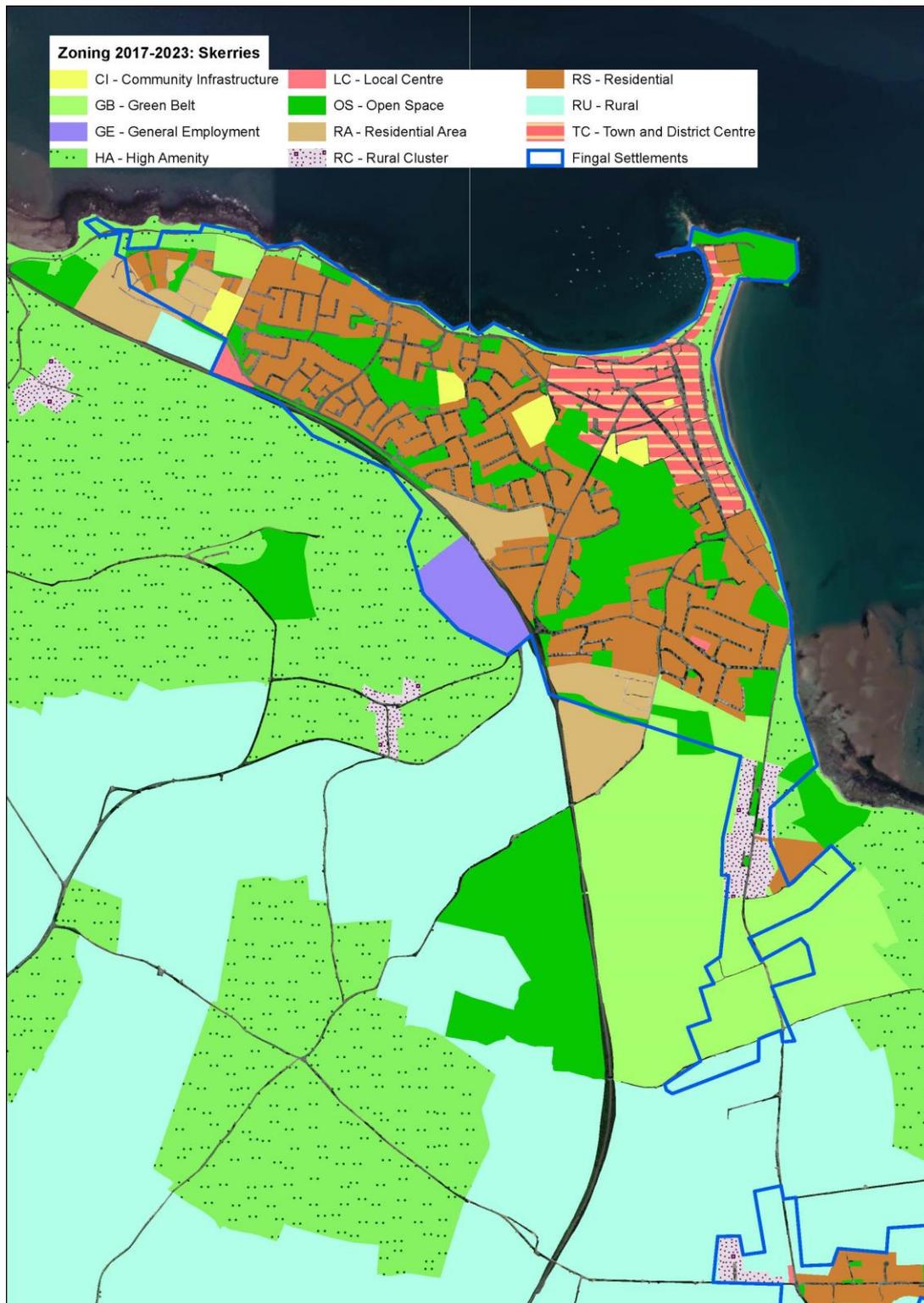


Figure 7-8 Skerries Zoning

## 7 Summary

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