

IRELAND 2040



DublinAirport



EXECUTIVE SUMMARY

Ireland is a small island-based economy on the periphery of Western Europe. The State has a population of 4.5m with about one third of that located in Dublin. Whilst proportionally this may be high, the scale of Dublin as a capital city with a population of 1.3m is modest by international standards. We cannot ignore this reality. In considering where we want Ireland to be in 2040, we must understand where we are starting from, our strengths and weaknesses; and address those first.

Given Ireland's small scale, its geographic position and its distance from many key markets there is no other viable option but to build and leverage critical mass in the Dublin region as a priority. As Dublin provides half the economic output of the entire country, this will provide a positive impact for the entire economy. Once we have leveraged our only area of critical mass, then should limited resources be dispersed over a wider area. The current critical mass of Dublin albeit limited, is our overwhelming advantage and we must build on it further. The advantages of critical mass were seen when Ireland acceded to what is now the European Union (EU) and became part of a much bigger market place of over 500m people. Ireland needs to build scale and critical mass in order to compete in a global context. If Dublin succeeds then all of Ireland can; however if it fails, then Ireland will fail too.

RECOMMENDATION 1.

The positive role of the Dublin city-region must be acknowledged and supported in the NPF.

Dublin's growth and success is a source of prosperity for Ireland as a whole. The critical mass that Dublin has reached allows it and therefore Ireland to compete in global markets. The National Planning Framework (NPF) must ensure that Dublin's success can continue. If the Dublin region does not have a sufficient supply of labour, housing, transport and other critical infrastructure, international investment will be diverted elsewhere in Europe or further afield; not necessarily to other parts of Ireland. Dublin isn't competing with cities such as Cork or Galway, it is competing with other city-regions across Europe.

We ask that the NPF provide support for the continued growth of the Dublin region in a sustainable manner. In this regard we ask that the available capacity for growth in Fingal be acknowledged and utilised. Fingal has the opportunity to provide for higher residential densities within the county town of Swords, whilst at the same time offering lower density housing options to the north of the county. Fingal was one of the fastest growing areas nationally during the last inter-censal period and continues to provide a plan-led approach to further growth through its recently adopted County Development Plan (March 2017).

RECOMMENDATION 2.

Aviation must be integrated into the NPF, and therefore we request that an objective be included in the plan that calls for continued growth in connectivity at Dublin Airport.

In a manner similar to the Dublin city-region, the scale and critical mass at Dublin Airport enables it to drive greater connectivity between Ireland and key global markets, for both business and leisure travel. The total economic impact of Dublin Airport is equivalent to 4% of Ireland's national GDP¹. The greater frequency and route choice at Dublin Airport serves all of Ireland. Dublin Airport must be able to grow in a manner that continues to expand opportunities for the domestic economy, both business and tourism. We ask that the NPF include an objective that supports continued growth in connectivity at Dublin Airport.

1. Dublin Airport Economic Impact Study, InterVISTAS Consulting Ltd.

RECOMMENDATION 3.

Designate Dublin Airport as an Airport Economic Zone.

Dublin Airport is seeking to build on the existing 16,000 on-site jobs and over 100,000 jobs supported nationally through its designation as an airport economic zone. Airports globally are now providing commercial zones for high quality office environments adjacent to their terminal facilities. In the same way that docklands areas internationally have re-purposed over the past 30 years; airports are now leading the way in terms of the compact urban form. They facilitate a new type of employment that requires seamless international connectivity for a highly mobile workforce and this reinforces the attractiveness of the capital city as a whole. We request that the NPF recognise the economic impact of the airport through its explicit designation as an Airport Economic Zone. This will identify to investors that opportunities similar to those at Manchester, Zurich, Amsterdam and most other international airports are also available at Dublin.

This designation would provide a unique opportunity for, and synergies with the county town of Swords and the wider Fingal county which has capacity to deliver up to 49,000 housing units. The Dublin Airport Economic zone will in turn require the supply of goods, services and business office space in the surrounding areas. There is ample capacity for these services to be accommodated in the neighbouring town of Swords and adjacent zoned lands in the area.

RECOMMENDATION 4.

Provide an implementation plan with the NPF which prioritises key enabling infrastructure.

The NPF must be more than merely a policy document. It must have a goal and a clear set of implementation steps. Key to this will be addressing existing infrastructural deficits even before the impact of future growth is layered on. The vision for Ireland of 2040 must therefore include infrastructural pre-requisites together with an evidence base to support this. In this regard we request that the NPF include the following as essential enablers to any plan:

- An implementation plan to achieve Ireland 2040.
- A clear understanding of the current position. The infrastructural deficits of today must be addressed as they are affecting competitiveness.
- An evidence-based hierarchy for population forecasts and strategy including alignment with necessary infrastructural supports such as employment, water, drainage and social infrastructure.
- A delivery plan for the Greater Dublin Area Transportation Strategy 2016-2035 to ensure that Dublin is moving, and that all of Ireland has the opportunity to connect to and avail of the benefits of this region. It is not appropriate that a lack of transportation infrastructure becomes an impediment to approving economic activities. The following key enabling projects are required as a matter of urgency:
 - Dublin Outer Orbital Motorway providing a by-pass of, and relief for the M50.
 - Additional M50/M1 capacity must be provided pending the delivery of the Dublin Outer Orbital through expansion into existing road reservation areas.
 - Additional interim road schemes to

provide alternative capacity to the M50 pending the delivery of the Dublin Outer Orbital, such as Fingal's East-West Distributor Road between Dublin Airport and the M50.

- Metro North to provide time-guaranteed transfer times between the city, the Airport and onto Swords.
- Appropriate and timely water supply, and waste-water infrastructure.

- There must be a joined up approach between employment and housing nodes to optimise the use of existing and future infrastructure. In this regard the capacity available in the Fingal area must be acknowledged and leveraged. Fingal forms part of the metro economic corridor and the Dublin-Belfast corridor. It represents a highly connected area both nationally and internationally from which to leverage growth. With capacity for 49,000 additional housing units under its new Development Plan, it is well positioned to deliver this capacity. Whilst Fingal already has an international school, it is considered that it would benefit from building on this base, to ensure that Dublin is attractive to not only inward investment, but also to a highly-skilled labour force throughout the EU.
- That critical mass and connectivity form a key tenet of any assessment criteria for the evaluation of future policies and objectives of the NPF to ensure that we have national infrastructure to connect all of Ireland including to Dublin, and to Dublin Airport.

PROPOSITION:

The National Planning Framework (Ireland 2040 – Our Plan) poses the question, what should Ireland look like in 20 years' time?

To answer this question, we must consider the Ireland of today. Ireland has been transformed from a protectionist agrarian economy to one of the most open economies in Western Europe. A key element in this change was accession to what is now the EU. With this decision came critical mass. Ireland moved from a small peripheral economy to becoming part of a much bigger market-place; and with that scale came opportunity. Not overlooking the recent financial crisis, Ireland has nonetheless formed part of an economic union that has seen GDP per capita across the Union the rise to \$37,178². It is clear that there are benefits to be gained through critical mass. Such scale will require infrastructural investment both to support it, and to ensure that all of Ireland is connected. As Ireland is such a small country in relative terms, it is vital that we build on existing critical mass in the Dublin area. With limited resources and a small population, this is the only feasible strategy as a superior priority for national economic well-being.

Ireland is once again regaining competitiveness and returning to growth. In addition to indigenous growth, a key part of this success has been to look outward for opportunity. To this end, IDA Ireland is currently implementing its strategy *Winning: Foreign Direct Investment 2015-2019*. This strategy document notes that IDA Ireland client companies contribute €22.4bn to the Irish economy is targeting an increase of 80,000 new jobs over the period³. It is obvious that an outward looking focus has brought opportunity.

In order to continue to tap that resource, it is important that Ireland continues to have a critical mass of talent, services, housing supply and infrastructure. Dublin is the only city in Ireland of international scale, and while modest compared to its global peers, it does provide the critical mass and availability of labour

supply that international companies seek. It is critical that all of Ireland is linked by both hard and soft infrastructure (e.g. broadband) to the Dublin region to ensure that all areas benefit from this success.

Dublin Airport in turn provides a vital connection between the domestic economy and the global market place. It directly connects Ireland to more than 185 international destinations. Just as economic activity has been attracted to the Dublin region, so too have new airline routes, destinations and additional flight frequencies. Dublin has the scale to attract this new business and to compete with other city-regions for new routes and expanded services where there is an available catchment from which to grow viable connections.

The benefits reaped from the connectivity at Dublin Airport and the success of the Dublin region benefit Ireland as a whole. In 2015 it was identified that Dublin Airport contributes 4% of the national GDP. Dublin Airport connects all of Ireland with the world. The motorway network, and up to 1,500 daily bus movements connect all corners of Ireland with Dublin Airport. This connectivity with the global market place greatly increases the potential for rural enterprise with direct export capability for time-sensitive perishable goods.

It is therefore clear that critical mass and connectivity should form the cornerstones of any Plan for Ireland in 2040. These two tenets directly contribute to the viability of the physical infrastructure required to support a positive and progressive Ireland for all in 2040.



2. Rome Redux: New Priorities for the European Union at 60, McKinsey Global Institute, March 2017.

3. Winning: Foreign Direct Investment 2015-2019, IDA Ireland.

4. Dublin Airport Economic Impact Study, prepared by InterVISTAS Consulting Ltd, 2015.

RECOMMENDATION 1.

The positive role of the Dublin city-region must be acknowledged and supported in the NPF.

Dublin is a cosmopolitan, outward-looking, dynamic and confident city. Home to a significant cluster of high-tech industries, attractive to Foreign Direct Investment (FDI) and mobile global talent. These are some of the reasons why people move to Dublin from across Ireland and the world. The population growth is testament to Dublin's continued success.

Dublin accounts for almost half of national economic output and 55% of tax receipts⁵. It drives growth for the entire country. Curbing growth in Dublin would not have the effect of transferring growth elsewhere because that is not how the economy works. Such policies are more likely to reduce the economy as a whole. Building on Dublin's success on the other hand, will benefit the whole State.

Ireland is not unusual amongst small, high performing countries in having a dominant capital region. Copenhagen accounts for 43% of Danish GDP, somewhat less than Dublin. This is to be expected however as Denmark enjoys a more central and continental geographical location than Ireland. Ireland's position on and island on the edge of Europe makes it all the more critical that we focus resources and growth in order to build an economy that has scale and is attractive to international investment.

A strong city-region gives Ireland a critical mass of talent, business, services and facilities that enable it to compete internationally. It is essential to continue to make the Dublin city-region an attractive and efficient place to live and to do business. Not only is this essential for continued economic success, but it also creates an appropriate first impression as the gateway to the entire country.

The Dublin city-region needs to be developed with nodes of critical mass which balance the city centre business district, make best use of existing infrastructure and re-develop lands for higher value uses. It needs a well-

developed and efficient infrastructure including the airport, road network and public transport system. It must remain internationally relevant, cosmopolitan, focused on global strengths and connected to other economies.

While Ireland 2040 will seek to define what the Ireland might look like more than two decades from now it is also appropriate to consider infrastructure of a strategic nature, particularly where it may fall to one local authority for its delivery. Mechanisms for delivery require strategic consideration both in terms of administration and funding.

Dublin Airport is located within the administrative area of Fingal County Council. Fingal continues to be one of the fastest growing areas of the country and experienced an 8% population growth rate over the last inter censal period. Its county town Swords is a key location for airport employees with almost 1,800 vehicular trips occurring between the airport and Swords. Fingal has the opportunity to develop an additional 49,000 housing units in line with its recently adopted County Development Plan. At 2.7 persons per household identified in the 2011 census, this would provide for population growth in excess of 130,000 within the Fingal area. Fingal already has a strong business base underpinning the county and has capacity to expand this even further. It will be essential for any plan to provide key enabling infrastructure to support this growth in a timely manner.

The delivery of the metro will provide a further economic impetus to the Fingal economy. In 2008 Fingal County Council commissioned Indecon Economic Consultants to prepare an economic strategy for the Metro North Economic Corridor (MNEC) to ensure that the full benefit of this investment is realised⁶.

The report highlighted the following key strengths of this area between Dublin City and Drogheda:

Summary of Key Strengths of MNEC Area
Metro North rail link
A high employment rate
A low dependency rate (retired, unable to work and students)
Available labour/skills pool within the workforce with relatively high educational attainment
Location within MNEC of Dublin Airport
Access to National and international markets by virtue of road network
Proximity to major seaports including Dublin Port and the proposed Braemore Port
Existing base of foreign and indigenous firms
Planned Critical Mass of population
Access to major 3rd/4th level institutions in North Dublin/Dublin area
A high Quality of Life in the area

Source: Indecon analysis

that with scale while the report was prepared in 2008 these attributes remain valid in 2017. There is ample capacity within the Fingal region for industrial, office, housing and education/school development within the MNEC. The Fingal Development Plan 2017-2023 calls for the optimisation of this investment:

The indicative route for new Metro North will facilitate the optimal development of Swords into the future and the Council will maximise the benefits of and the efficient use of the Metro for the benefit of those living and working in the town. The Council, in accordance with best practice and the principles of sustainable development, will seek to maximize the opportunities created by the arrival of this key piece of infrastructure. To this end the identification and promotion of the Metro Economic Corridor(s) will be of strategic importance to the economy and well-being of the County's residential and business/employment population⁷.

The NPF must include policies to support the continued growth and development of the Dublin city region for the whole country's benefit. We request inclusion of the following the NPF:

Recommendation 1.	Proposed Objective
i	The Dublin region is recognised as the being at the hierarchy of the settlement pattern. In this regard, its growth shall continue to be supported and it shall be developed in a structured manner with key employment nodes supporting the city centre.
ii	The NPF shall identify critical national infrastructure and outline a joined up approach to its delivery in terms of prioritisation, funding and delivery mechanisms (both planning and expediting construction) across all relevant government departments.
iii	Fingal shall be supported in its capacity as one of the fastest growing areas nationally, and with potential to grow further over the NPF period.
iv	The Metro North Economic Corridor which forms a key link on the Dublin-Belfast Corridor shall be promoted as a key area for sustainable economic, housing, commercial, office and education provision.
v	Existing and future international schools within the Fingal area shall be promoted and expanded to support inward investment and a growing international workforce.

7. Fingal Development Plan 2017-2023, Fingal County Council, 2017.

5. Revenue Net Receipts by County 2015, <http://www.revenue.ie/en/about/statistics/receipts-county.html>

6. Economic Development Strategy for the Metro North Economic Corridor (The Development of an Internationally Sustainable Airport City Region), Indecon International Economic Consultants on behalf of Fingal County Council, 2008.

RECOMMENDATION 2.

Aviation must be integrated into the NPF, and therefore we request that an objective be included in the plan that calls for continued growth in connectivity at Dublin Airport.

Transatlantic air travel, duty-free shopping and aircraft leasing have all been pioneered in Ireland throughout the last century. Ireland is home to Aer Lingus and Ryanair, one of the largest international airlines in the world. Ireland is a global hub for aircraft leasing and financing. Nine of the top ten aircraft leasing companies are head-quartered in Ireland, representing \$120bn in aircraft assets and 50% of the world's leased fleet⁸.

Just as the document Ireland 2040 Our Plan: Issues and Choices stresses the need for integrated land and marine development, so should the NPF integrate land and aviation development with reference to the National Aviation Policy 2015⁹ which has the following principal goals:

- To enhance Ireland's connectivity by ensuring safe, secure and competitive access responsive to the needs of business, tourism and consumers;
- To foster the growth of aviation enterprise in Ireland to support job creation and position Ireland as a recognised global leader in aviation; and
- To maximise the contribution of the aviation sector to Ireland's economic growth and development.

For an island as small as Ireland there is an inherent efficiency in having an airport of critical mass connected to all areas of Ireland. This provides Ireland with a world-class gateway, makes best use of capital investment and creates an airport of scale that allows Ireland to compete globally for new routes and connectivity. Dublin Airport is just such an airport. In 2016, 82% of all Republic of Ireland air travel was made through Dublin Airport in spite of the proliferation of airport choice in Ireland. Across the entire Island of Ireland 65% of air travel is via Dublin Airport. Connectivity is the reason for this success. Connectivity

matters because it gives access to markets and destinations (inbound and outbound). Access, and just as important, frequency of access to a broad range of markets, particularly the biggest and fastest growing ones, reduces the cost of doing business in and from Ireland and opens up opportunities for indigenous enterprise.

Dublin Airport is now served by more routes than ever before. Between 2008 and 2016, Dublin Airport increased its connectivity by over 40%, far outperforming most European airports. There are now over 350 services operating to over 185 destinations. Dublin is now the most connected airport in Europe relative to GDP¹⁰. In 2016 the airport served almost 28m passengers; significantly more than in the pre-recession years. This upward trend is expected to continue over the medium term. Globally the International Air Transport Association (IATA) expects 7.2bn passengers to travel in 2035 which is a near doubling of the 3.8bn in 2016¹¹.

Aviation connects people, places, goods and services in different countries and through this creates wealth. The contribution of Dublin Airport to national GDP has already been highlighted in this document. The global economic contribution of aviation was most keenly demonstrated during the eruptions at the Icelandic Eyjafjallajökull volcano in 2010 and the ensuing ash crisis that followed. For just a matter of weeks of disruption, the global economic impact of this crisis was estimated to be US\$4.7bn. This demonstrates the magnitude of trade facilitated by aviation¹².

It is important to maintain and grow the connectivity at Dublin Airport. The economics an individual route can be marginal and therefore it is essential to underpin the route with critical mass through population and catchment area. If Dublin were to lose the level of connectivity that it currently enjoys, it would be lost to Ireland rather than to

elsewhere nationally. In a highly competitive industry with mobile assets (i.e. aircraft), it is essential that the viability of routes at Dublin continues to be supported with population growth. Connectivity is not just achieved through the number of destinations, but through route frequency (is it multiple times daily) and also the depth of the route network served (where can you get to from the initial destination). Dublin Airport provides a plentiful supply of passengers including those that originate in Dublin and those that transfer in from one flight at Dublin Airport directly onto another outbound flight. The supply of transfer passengers from one flight onto another can ensure the viability of the onward flight, particularly where larger aircraft are involved. Critical mass is essential to achieve this. Smaller regional airports (say those of under two million passengers) simply do not have the critical mass to maintain that depth of connectivity. Where demand is proven however it does provide the opportunity to provide direct versus indirect connectivity.

Dublin Airport's has two major airlines with significant aircraft fleet based at the airport. The aviation business model dictates intensive asset utilisation, so that Dublin-based aircraft leave early each morning and return late at night. This coincides with Irish business traveller requirements as it enables a full day's work to be undertaken in British and also continental European destinations, which are one hour ahead of Ireland. When it comes to non-Dublin based aircraft, the airport must also be led by the market and operate to an international flight schedule which will dictate when flights arrive from other locations.

It is clear that the connectivity which is supported by critical mass at Dublin Airport is connecting Ireland to more tourist and business destinations than ever before. This connectivity is underpinned by strong land use planning (safeguarding in the vicinity of the airport), and a significant capital investment programme that is entirely self-funded. The campus facilitates up to 100,000 passengers on a peak summer day. There are few other sites in Ireland handling such capacities. In order to continue to grow this positive economic impact, we ask for the following objective to be included in the NPF:

Recommendation 2.	Proposed Objective
	Aviation and air travel will continue to be a key element of connecting Ireland to the world. Dublin Airport is Ireland's global gateway and increased connectivity at the airport shall be supported including through effective land use planning.

8. Irish Aviation Authority www.iaa.ie
 9. <http://www.iaa.ie/sites/default/files/publications/aviation/english/national-aviation-policy-ireland/national-aviation-policy-ireland.pdf>
 10. *Connectivity Report*, Airports Council International, 2016.
 11. <http://www.iata.org/pressroom/pr/Pages/2016-10-18-02.aspx>
 12. https://www.tcd.ie/Economics/assets/pdf/SER/2014/elin_thora.pdf

RECOMMENDATION 3.
Designate Dublin Airport as an Airport Economic Zone

Dublin Airport supports over 100,000 jobs in the Irish economy. It is a major economic and employment hub for the entire island. About 16,000 people are employed at the airport in aviation or aviation-related activities such as the airport operator (daa), airlines, ground handling agents, the Irish Aviation Authority, retail, catering and other business. Another 10,000 or so jobs are in the supply chain of the businesses directly involved with the airport activities, for example supplying food and equipment to the catering businesses at the airport. More than 12,000 jobs arise from the direct and indirect expenditure of employees. On top of this, the airport activities facilitate employment in other sectors of the economy. This improves national economic performance through tourism, trade in goods and services, investment and increased productivity.

In 2015, the total benefit to the economy from Dublin Airport was valued at €6.9 billion, which was equivalent to about 4% of national GDP¹³. The hotel cluster around the airport is the largest cluster outside of Dublin city centre. There is also an opportunity to expand the economic footprint even further. Dynamic, globally relevant cities are increasingly developing their airports as major economic areas:

“In the age of global air travel, the airport is increasingly the principal economic gateway for a city’s trade and exchange. Once banished to the peripheral limits of the city, airports are now becoming increasingly centralised in a city’s commercial patterns and absorbed within the form of the city itself. High-value activities that are part of time-sensitive global supply chains are drawn to the airport; the airport city consolidates peripheral development into a coherent urban core adjacent to the airport limits and, where possible, into the very centre of the airport.

The presence of commercial activities creates demand for additional aviation

movements, which in turn stimulates additional high-value activity.¹⁴”

Dublin Airport is well positioned for further economic development that will benefit the local area, the city-region and the entire country. A new commercial node at Dublin Airport known as Dublin Airport Central (DAC) is being developed to deliver a compact commercial development on an existing brownfield site at the airport (30ha.). It will be a commercial employment area which enjoys the benefits of the connectivity of the airport. As the Dublin city-region is short of well connected, serviced brownfield sites for commercial development, this is a unique opportunity to deliver economic growth. It also provides Ireland with an opportunity to compete for business that desires connectivity. In this regard permission has recently been granted for the first phase of 40,000sq.m of Grade A office space by An Bord Pleanála. DAC will complement Dublin city centre and Phase 1 has recently achieved Leed Platinum which is the highest level of US accreditation in sustainable building design.¹⁵The sustainability of this compact city will be further underpinned by the delivery of metro north planned for 2026.

DAC will create a unique, highly efficient and well-planned economic area of strategic national importance. This compact development will leverage the economic synergy between the airport and the cluster of the world’s top multi-national corporations in the Dublin city region. The effectiveness of these success criteria has been proven at similar developments at Frankfurt, Schiphol, Zurich and Manchester airports. The DAC plans have been re-affirmed in the Fingal Development Plan 2017-2023. The first phase of development (40,000sq.m of Grade A office development) has recently been approved by An Bord Pleanála.

DAC will complement Dublin city centre, providing an alternative growth centre. It responds particularly to the specific needs

of some multi-nationals, outward looking indigenous companies (e.g. ESBi which has recently located at the airport) and potentially other firms seeking a European base post-Brexit. Much more significantly it will also provide a location for mobile investment that competes with other cities.

It will provide a catalyst for other similar projects in the Fingal area as has been proven around Schiphol for example. The benefits include employment and economic growth for the entire country, but specifically for Fingal and the town of Swords. These benefits can be delivered relatively efficiently, as the airport is already served by existing infrastructure and committed future projects such as the new Metro North.

In order to optimise Ireland’s opportunities, it is of key importance that the NPF recognises and designates Dublin Airport for sustainable, compact economic and employment growth. The daa asks for Dublin Airport to be designated as a National Economic Centre, akin to the designation that kick-started the repurposing of non-operational areas of the docklands in the 1980s into the International Financial Services Centre (IFSC).

Just as the IFSC was a game changer of its time, now too Dublin Airport can be a role model for the compact development. The acknowledgement of the employment site will enable joined up planning between the employment on site and the wider Swords/ Fingal region; one of the fastest-growing areas of the State over the last inter-censal period.

Recommendation 3.	Proposed Objective
	Dublin Airport is recognised as an Airport Economic Zone and in this regard is designated as a national employment node with unique connectivity characteristics and which is complementary to Dublin city centre.

13. *Dublin Airport Economic Impact Assessment*, InterVISTAS, 2015.
14. *From an article published in Modus Magazine*, May 2012, Chris Choa, AECOM.
15. <http://www.usgbc.org/leed>

RECOMMENDATION 4.

Provide an implementation plan with the NPF which prioritises key enabling infrastructure.

It is clear from this submission that with scale comes growth. It is important therefore that the Ireland of 2040 is fully connected, both internally and externally so that all areas benefit from that scale. Any plan for 2040 must be accompanied by an implementation plan which identifies the core deliverables required to achieve this. The starting point for this is today. In this regard the plan acknowledge and address existing infrastructural issues in order to move forward.

Equipping Ireland for future development requires both airport infrastructure and social and economic infrastructure to support the airport. Having recognised and designated the airport as an Airport Economic Zone in order to allow Ireland reach its full potential, the infrastructure must be then delivered in a timely fashion to enable it, and lack of infrastructure cannot be used as a reason to hinder development.

The lack of sustainable, planning including investment in essential infrastructure in the Dublin city region must be addressed in the NPF. Economic bottlenecks such as rising traffic congestion and housing shortages threaten to impede growth, deter inward investment and curtail development. These can be addressed by accepting and supporting the economic engine that exists on the east coast and by investing in essential infrastructure. Ireland continues to score relatively poorly in terms of its transport infrastructure, global competitiveness ranking according to the World Economic Forum ¹⁶.

Ensuring continued, efficient, access to and from the airport is critical for all air travellers whether inbound or outbound, for leisure or for business. The NPF should recognise and support this as a national objective which will also support the growth of the employment base at the airport. Employees will use the same surface access infrastructure and services as air passengers as their times of travel are complementary, but will require housing and other social infrastructure within

a short commuting distance from the airport. The NPF should support housing in Swords and other towns in Fingal and North Dublin that will be well connected to the airport by the future Metro North.

Of most importance is a substantial improvement in public transport in the Dublin city region. Implementation of the National Transportation Authority's *Greater Dublin Area Transport Strategy 2035* ¹⁷ is critical for Ireland. The elements of the strategy that Dublin Airport require to be delivered as soon as possible include:

- Dublin Outer Orbital Motorway providing a by-pass of, and relief for the M50.
- Additional M50/M1 capacity must be provided pending the delivery of the Dublin Outer Orbital through expansion into existing road reservation areas.
- Additional interim road schemes to provide alternative capacity to the M50 pending the delivery of the Dublin Outer Orbital, such as Fingal's East-West Distributor Road between the Airport and the M50.
- Metro North to provide time-guaranteed transfer times between the city, the Airport and onto Swords.
- Appropriate and timely water supply, and waste-water infrastructure.

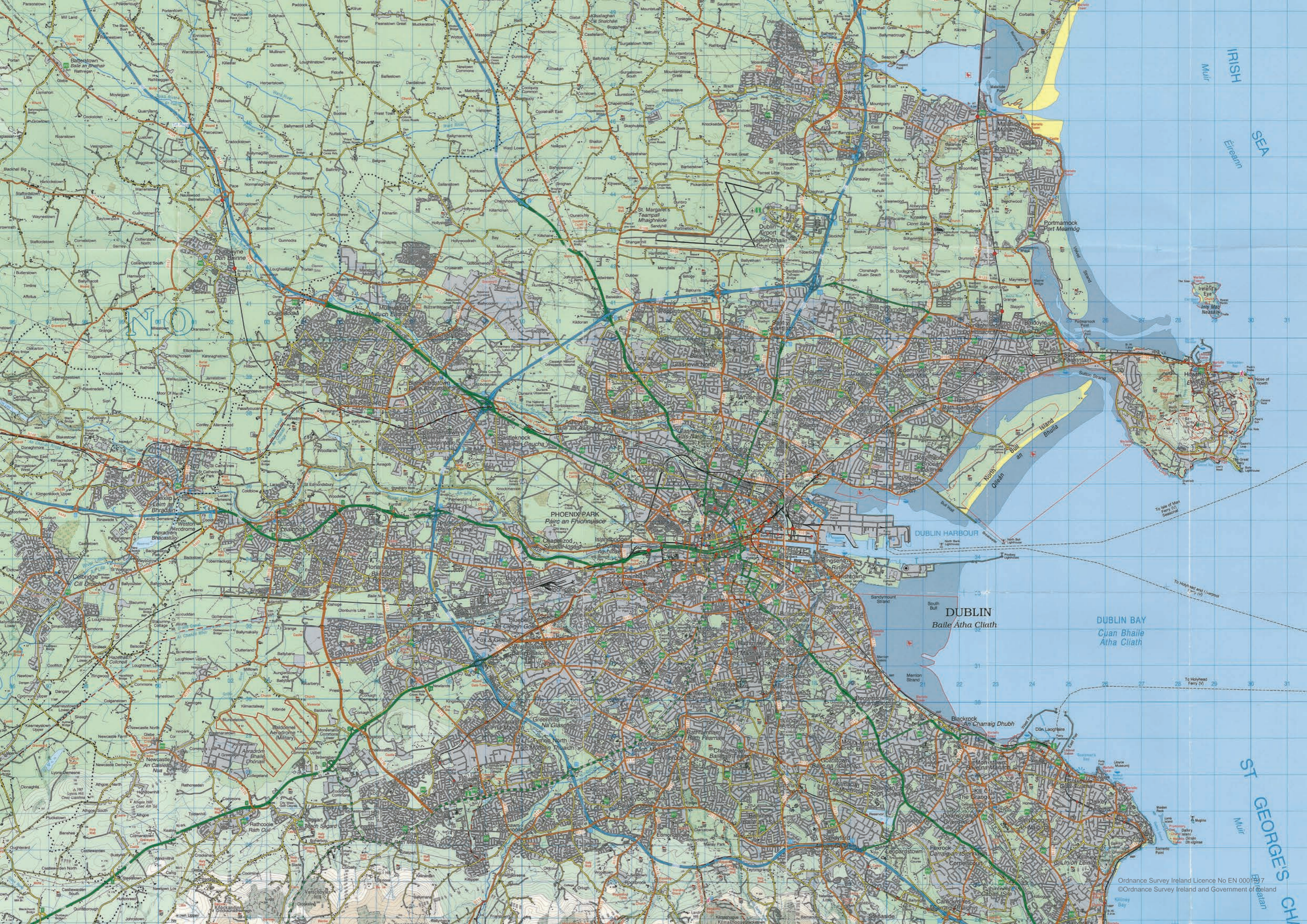
Implementation of the NPF must be supported by the proposed Interdepartmental drive to ensure that the process recognises the need for national economic competitiveness.

We therefore request inclusion of the following objectives within the NPF:

Recommendation 4.	Requirements for the Preparation of the NPF
i	That connectivity and critical mass be key criteria in the assessment of any objectives or policies for inclusion in the NPF, particularly where they relate to the Dublin city-region.
ii	That the NPF be evidence-based and include an aligned composite housing, employment, water, drainage, and social infrastructure, spatial strategy.
iii	That the NPF be accompanied by an Implementation Plan which identifies the steps for its delivery, i.e. measures required (hard/soft infrastructure) triggers and spatial allocation for same.
Recommendation 4.	Proposed Objective
iv	That development within the Dublin-region be based on the full implementation of the Greater Dublin Area Transportation Strategy (2016-2035).
v	That Metro North shall be delivered as a key priority in the delivery of the Greater Dublin Area Transportation Strategy.
vi	To ensure free-flow of access and egress to and from Dublin Airport so that connectivity and journey times to Dublin Airport, city centre, and beyond are guaranteed for business and leisure.
vii	That Swords (which is adjacent to the airport, which of itself has no resident population) be designated as a priority area for population growth.
viii	To explore, define and implement alternatives to M50 capacity such as the East-West Distributor Road to the north of the M50 in the Fingal area.
ix	To plan and implement regional water and waste water requirements such as alternatives to Ringsend wastewater treatment plant in a timely manner.
	To continue to provide International schooling facilities within the Fingal region and take advantage of the unique opportunity Dublin Airport and the Fingal area presents. This will assist in ensuring that the full range of social infrastructure which is attractive to inward investment and mobile capital is available.

16. <http://www.dttas.ie/sites/default/files/content/corporate/english/general/sfilt-investing-our-transport-future/investing-our-transport-future.pdf>

17. <https://www.nationaltransport.ie/planning-policy/greater-dublin-area-transport-strategy-2016-2035/>



IRISH SEA
Eireann

ST GEORGES'S CHANNEL
Eireann

NO

DUBLIN
Baile Átha Cliath

DUBLIN BAY
Cuan Baile Átha Cliath

9 Recommendation table. The bottom right hand cell should be two rows. There's no separation between water ask and school ask.
10 Delete page

SUMMARY OF EVIDENCE BASE FOR RECOMMENDATIONS

Recommendation	Why	Evidence Base
1. The positive role of the Dublin city-region must be acknowledged and supported in the NPF.	<ul style="list-style-type: none"> Dublin city region is the only Irish city with scale and critical mass to competitively compete with other international centres for inward investment. 	<ul style="list-style-type: none"> 553,165 – The limited number of people living within the Dublin City Council area. 1.4m – Total population of the Dublin counties . Density – Identified as a key factor in the planning and development of large-scale rail focused residential areas in Dublin. 49% - Contribution of Dublin to national GDP . 55% - Contribution of Dublin to net tax receipts 2015¹. 7th - Most attractive European city, scoring highly in human capital. 49th – Rank on the Innovation Cities Index (2016-2017). 2nd – Highest level of GDP per person employed among EU capitals (just behind London) Only Irish city featuring in most international city benchmarking indices.
2. Aviation must be integrated into the NPF, and therefore we request that an objective be included in the plan that calls for continued growth in connectivity at Dublin Airport.	<ul style="list-style-type: none"> Dublin Airport is Irelands only airport of significant international scale, and should be grown for the benefit of all of Ireland. Critical mass at Dublin Airport is supporting route development and viability and thus destination choice and frequency. Aviation connects people, places, goods and services in different countries and through this creates wealth. 	<ul style="list-style-type: none"> €6.9bn or 4% of GDP – Total economic impact of Dublin Airport on the national economy. Island nation - no land-bridge connection between Ireland and mainland Europe; aviation connectivity is central to wider economic opportunity. 82% of air travelers to the Republic of Ireland travel through Dublin Airport . 65% of all travelers to the island of Ireland travel through Dublin Airport . >510m – The population of the combined EU member states . The three principal goals of National Aviation Policy are: <ul style="list-style-type: none"> - To increase Ireland's connectivity. - To foster the growth of aviation enterprise. - To maximise aviation's contribution to Ireland's economic growth. 84% of all air freight and mail is handled by Dublin Airport. €4.6bn – Estimate by Fáilte Ireland of overseas earnings from tourism in 2015. US\$4.7bn - The estimated global economic impact of the ash crisis following the eruptions at the Icelandic Eyjafjallajökull volcano in 2010 – demonstrating the global economic contribution of aviation in just a few short weeks disruption. This demonstrates the magnitude of trade facilitated by aviation .
3. Designate Dublin Airport as an Airport Economic Zone.	<ul style="list-style-type: none"> The National Spatial Strategy (NSS) recognised Dublin Airport for aviation only. There is an existing employment base of 16,000 on the site in addition to 100,000 daily passengers which together with exports, support and supply services combine to generate 4% of national GDP. This economic footprint is being further expanded to provide Grade A office accommodation to cater for indigenous and inward investment to those companies seeking highly connected and ease of mobility for their employees. Overlooking the full economic footprint of Dublin Airport will mean that infrastructural supports within the region such as roads, housing and support facilities that are required for an operation of this scale will also be overlooked and will therefore curtail positive economic impact. 	<ul style="list-style-type: none"> 16,000 – The number of jobs at Dublin Airport measured in 2015. 100,000 – The total number of jobs supported by Dublin Airport national through direct, indirect, induced and catalytic impacts. 84% - Percentage of air mail/freight handled at Dublin Airport. 30ha. – Available land to deliver Grade A office space at Dublin Airport to further broaden employment base of the Fingal area. Ireland has the opportunity to benefit from relocation of FDI from the UK following Brexit; (size of the positive effect is dependent on global demand and the future relationship between the UK and the EU. . Manchester, Zurich, Schiphol – International examples of airport city economic development.
4. Provide an implementation plan with the NPF which prioritises key enabling infrastructure.	<ul style="list-style-type: none"> To provide clear guidance for regional and local authorities to structure investment and resources. To ensure that progress can be tracked. To prioritise the delivery of key infrastructure pieces such as Metro North and alternatives to the M50. Investment will be optimised through clear alignment of employment and housing distribution. Dublin Airport and Swords represent one such cluster of employment and available housing land. Fingal has capacity for up to 49,000 housing units. Ireland must deliver an attractive overall package to FDI firms looking to invest. Connectivity and critical mass have been cornerstones of the recovery to date. 	<ul style="list-style-type: none"> Lack of infrastructure, especially transport to ensure free flow of traffic in Dublin is an existing problem. 18% - Increase in the number of new vehicles licensed in 2016. These must be catered for 1.7% - Increase in the total kilometers driven in 2014. 29th – Ireland's mediocre ranking for Transport Infrastructure. Free flow of access and egress to the airport is critical in order to grow routes and remain attractive as a destination. Dublin Airport (16,000) jobs with potential to deliver additional non-aviation based employment is located beside the town of Swords, one of Fingal's key growth centers. IDA Ireland confirms that investment in areas such as education amongst other things underpins its success to date 40% additional connectivity delivered at Dublin Airport since the recession. Passenger numbers at Dublin Airport have grown by almost 10m since the recession. The Dublin region represents 49% of value added in the Irish economy .

18. Census of Population 2016, Preliminary Results, CSO, 2016
19. Census of Population 2016, Preliminary Results, CSO, 2016
20. Planning and Development of Large-Scale, Rail Focussed Residential Areas In Dublin, NTA & Department of Community and Local Government, May 2013
21. Urban Europe, Statistics on Cities, Towns and Suburbs, 2016 Edition, Eurostat, 2016
22. Net Receipts by County, <http://www.revenue.ie/en/about/statistics/receipts-county.html> Office of the Revenue Commissioners, 2016
23. LaSalle's European Regional Growth Index 2016.
24. Urban Europe, Statistics on Cities, Towns and Suburbs, 2016 Edition, Eurostat, 2016
25. Dublin Airport Economic Impact Report, prepared by InterVISTAS, 2015
26. Visitors to Ireland and Northern Ireland 2014: A Statistical Profile of Tourism, CSO & Northern Ireland Statistics and Research Agency, 2014
27. Visitors to Ireland and Northern Ireland 2014: A Statistical Profile of Tourism, CSO & Northern Ireland Statistics and Research Agency, 2014
28. Population and population change statistics Eurostat, July 2016
29. National Aviation Policy for Ireland, Department of Transport, Tourism and Sport, 2015.

30. Fáilte Ireland, Tourism Facts, 2016.
31. https://www.tcd.ie/Economics/assets/pdf/SER/2014/eilin_thora.pdf
32. Dublin Airport Economic Impact Report, prepared by InterVISTAS, 2015.
33. As 18.
34. As 20.
35. *Ireland's Economic Outlook, Perspectives and Policy Challenges*, ESRI, Dec 2016
36. *Vehicles Licenced for the First Time*, Statistical Release, CSO, 2017
37. *Transport Trends: An Overview of Ireland's Transport Sector*, Department of Transport Tourism and Sport, 2016
38. *Global Competitiveness Report 2016-2017*, World Economic Forum, 2016.
39. *Winning: Foreign Direct Investment 2015-2019*, IDA Ireland, 2015
40. *Ireland 2040 Our Plan – Issues and Choices*, NFP, Department of Housing, Planning and Local Government, 2017



DublinAirport