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**November 2016**

# Executive Summary

The ***Dublin Regional Enterprise Strategy*** provides a coherent and coordinated approach to promoting enterprise, employment and entrepreneurial activities in the Dublin Region for the period 2017-2019.

To inform the development of the enterprise strategy, a review of existing and emerging enterprise and employment policies is essential. The review recognises the wide range of policies that presently exist and the associated flexibility therein, to ensure that the strategy remains responsive to changing economic conditions and technological advances. In considering this policy direction, the augmentation through research, analysis and consultation of the current enterprise landscape in the Dublin Region provides a focused approach on key areas. These areas include, *inter alia*, understanding the *‘key enterprise sectors’* (namely,***Administration, Professional Services, Tourism and Leisure, Education and Training, Manufacturing and Industry, Transport and Logistics, Construction, ICT and Technology and Retail and Wholesale***), the associated employment levels, together with the clustering of enterprise activity and enterprise supports. In particular, stakeholder consultation allows for key insights to be garnered and incorporated into the strategy’s development and future overall direction.

The recent improvements in the national economy have been heavily driven by the economy of the Dublin Region. Growth in the number of enterprises and a reduction in the unemployment rate illustrate an increasingly entrepreneurial economy and reflect the establishing of many new start-up enterprises. Within this context, the identification of *‘growth opportunity areas’* can have significant potential for enterprise consolidation and expansion in the future. These are centred on the following: ***Design and Creative Industries, Food Industry, The Green Economy (CleanTech and Environment), International Financial Services, Pharma/BioPharma, Software and Digital, Tourism, and Education and Training***.

Recognising the existing enterprise landscape and the policy and economic conditions that shape it, it is paramount that a future *‘enterprise vision’* for the Dublin Region be articulated. The vision of this strategy is…

***“… for the creation of a sustainable, globally competitive and innovative destination for enterprise development and living”.***

The delivery of this vision is ensured through ‘*key enterprise objectives*’ which reflect and to guide the current enterprise landscape towards the delivery of the enterprisestrategy. With each objective relating to a vital *‘enterprise driver’*, covering areas of meeting the needs of entrepreneurs and enterprises, assisting the potential *‘growth opportunity areas’*, future skills, education and training needs and requirements, promoting a culture of entrepreneurship and innovation, the positioning of the City Region, and ensuring a high quality of life, focussed *‘enterprise recommendations’* will ensure their fulfilment. In turn, these recommendations can ensure the roll-out of both regional and local *‘enterprise actions’*, with the successful implementation of these being crucial to secure the overall successful delivery of this three-year enterprise strategy for the Region, through an integrated and focussed approach.

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# Section 1: Establishing the Context

Local authorities are mandated to promote the economic development of their areas including enterprise development across numerous enterprise sectors, through facilitating and assisting indigenous industry, micro-enterprises and Small and Medium Enterprises (SMEs), enhancing innovation and research and development capacity, and in so doing put in place the necessary supports and infrastructure. The achievement of this is primarily facilitated through local economic development units and local enterprise offices (LEOs).

The four Dublin local authorities, namely South Dublin County Council, Dublin City Council, Dún Laoghaire Rathdown County Council and Fingal County Council, are putting in place a three-year strategy to guide the enterprise growth and development of the region. While being mindful of the distinct characteristics of the local authority areas, there are clear benefits to a combined strategy at a regional level. A collaborative approach to the development of enterprise policies across the region can lead to the enhanced sharing of best practices in support delivery and programmes, as well as having the potential to support Dublin with a unified voice.

As a relatively small City Region, but one that is internationally focussed, Dublin presents many unique opportunities for the development of enterprise. **The region’s many enterprise assets include thriving internationally important areas, such as International Financial Services (IFS), Information and Communications Technology (ICT) and Pharma/BioPharma, as well as well-developed creative and food and drink manufacturing industries, while also harnessing education and research.** Dublin is the main international connection to and from Ireland and is the primary logistics and transportation centre in the country. Dublin is a strong tourism destination with an established reputation for its heritage, culture and quality of experience, benefitting from its accessible coastline and mountains to the east and south respectively.

The region has an excellent educational offer. **Dublin houses three internationally-recognised universities, four Institutes of Technology, several small colleges, as well as education and research centres** across a wide range of cutting edge sectors. Collaboration between private enterprise and the third level sector is growing, leading to further much needed and fit-for-purpose innovation and ideas. The start-up environment is further helped by recent improvements in potential funding sources, the availability of working space and the coordination of support activity.

Dublin’s entrepreneurial and start-up ecosystem is well established with particular expertise in digital technology, encompassing a wide range of related areas including ICT, financial services, data analytics and app development. Dublin is currently leading the recovering of the Irish economy, currently accounting for just over 43% of national *‘Gross Value Added’* (GVA)[[1]](#footnote-1) and more than 30% of employment in the country. The delivery of training and skills is a key issue to enhance the enterprise potential of the region. Training is currently provided by a wide range of agencies and through ongoing collaboration that largely responds to the demands identified in the market. However, improvements in linkages, coordination and responsiveness can assist in expediting delivery and maximising constrained resources.

The economic outlook for the region is largely positive with increases in GDP (Gross Domestic Product)[[2]](#footnote-2) and employment, and the emergence of new, innovative enterprise types and sectors. However, there are some critical issues that must be addressed to ensure that future growth and diversification is not hindered. These issues include; shortages of housing, particularly in locations close to employment opportunities; affordable office space; inadequate public transport connectivity across the region; and the presence of skills shortages across a number of important sectors. Events such as the United Kingdom (UK) leaving the European Union (EU) could have serious consequences for Ireland and the Dublin Region. As such, this enterprise strategy examines, at a strategic level, the short, medium and long-term actions to deliver on the objectives to transform and promote the region and provide the resilience and capacity to respond to the inevitable changes such as economic conditions, technological and sectoral innovation, environmental matters, or political change.

**Section 2: Understanding the Enterprise Policy Framework**

There is a wide range of enterprise policies that guides and supports the enterprise environment in Ireland, which have primarily been formulated in response to the changing national and international business environment. As a myriad of actors have a role in enterprise development and transformation throughout Ireland, it is essential that the policy framework coordinates and integrates the demands of all stakeholders to forge a common and consistent direction to inform future decisions.

The enterprise policy framework displays a series of common principles that apply across the policy strategies and plans. These common principles are outlined below and are supported by brief explanatory text.

**Technological Change**

Advances and the pace of change in technology are having a transformative impact across the enterprise spectrum and on society as a whole. This offers opportunities as well as challenges to the Irish economy. Key areas include ICT, Agri-Tech, Advanced Manufacturing (such as 3D Printing/Additive Manufacturing), Data Analytics, ‘Born Globals’[[3]](#footnote-3), Composites and Advanced Materials, e-Health, e-tailing (online retailing), FinTech (financial technology), Internet of Things, Sharing Economy and Smart Ageing.

Key Documents: ***Enterprise 2025:*** ***Innovative, Agile, Connected*** (2015).

**Skills and Talent**

The need to encourage ongoing skills training is a core principle of the policy suite. It is the intention of policy to bring together the primary agencies involved in education and training with employers and the local authority sector to identify key areas for improvement and areas for future growth.

Key Documents and Groups: ***Ireland’s National Skills Strategy 2025*** (2016)[[4]](#footnote-4), ***Dublin Regional Skills Forum***[[5]](#footnote-5)***.***

**Local Enterprise Reform**

Reforms to local government have created a stronger and clearer role for local authorities in economic and community development. In relation to the former, the LEOs have played a major part in facilitating enterprise development and expansion.

Key Documents and Groups: ***Local Government Reform Act 2014***[[6]](#footnote-6), **Local Economic and Community Plans (LECPs)*, Action Plan for Jobs: Dublin 2016-2018***[[7]](#footnote-7)(2016), ***Eastern and Midland Regional Assembly***[[8]](#footnote-8), ***Dublin Regional Skills Forum.*Entrepreneurship and Innovation**

Growing entrepreneurship and innovation in products and processes have been identified as a fundamental pillar of the policy framework. Dublin is to be promoted as an ‘*Ideas Capital’* where innovation is a way of life. Policy aims to create changes in mind set to expand the culture of innovation and entrepreneurship, which has historically not been as strong in Ireland as in competitor markets.

Key Documents and Groups: ***Action Plan for Jobs: Dublin 2016-2018***, ***Innovation 2020: Excellence, Talent, Impact*** (2015)[[9]](#footnote-9), ***National Policy Statement on Entrepreneurship in Ireland***, ***Implementation Body of the Action Plans for Jobs for Dublin***, ***SOLAS***[[10]](#footnote-10)***.***

**Placemaking**

The softer aspects of enterprise policies are of key importance. Innovation and enterprise success is correlated with the development of high quality places. As an open, internationally connected city-region, Dublin competes for mobile capital and labour. It is recognised that continued investment in essential infrastructure for business and communities, such as water and power services, housing and the public realm are essential to allow business to flourish and attract skilled workers.

Key Documents: ***National Planning Framework, Regional Spatial and Economic Strategies,* County and City Development Plans, Local Area Plans, LECPs, Strategic Development Zone (SDZ) Planning Schemes.**

**Change and Adaptation**

The enterprise environment is characterised by a high degree of changing circumstances. The realities of change require policies to be both reactive and proactive in order to best respond and to guide all forms of future enterprise.

Key Documents and Groups: ***Dublin Regional Skills Forum, Action Plan for Jobs: Dublin 2016-2018, National Planning Framework, Regional Spatial and Economic Strategies.***

**Smart Specialisation**

While it is recognised that over concentration can lead to vulnerability to shocks, the identification of specialisation opportunities has potential to generate significant growth. This search for concentration should occur in those sectors where comparative advantage exists or can be created.

Key Documents: ***Ireland’s Smart Specialisation Strategy for Research and Innovation - Summary***[[11]](#footnote-11)(2014).

**Conclusion**

Global trends and the performance of Ireland’s indigenous and multinational enterprise provides the backdrop against which policy for employment and enterprise has been developed. Policy guides and assists the strategic direction of future action but is not prescriptive, providing for the flexibility to evolve as future opportunities, technologies and economic conditions change. As noted above, it must remain both proactive and reactive to the changing economic and enterprise environments.

# Section 3: Current Enterprise Landscape of the Dublin Region

The Dublin Region has driven Ireland’s recovery since 2010 by consistently accounting for close to half of the State’s Gross Domestic Product (GDP)[[12]](#footnote-12), displaying excellent resilient characteristics. As a **globally connected City Region and the economic, political, administrative and infrastructural centre of the State,** Dublin is the most successful location for enterprise in Ireland. Dublin benefits from its national primacy, particularly in relation to its international and national levels of connectivity and associated infrastructure development, with Dublin Airport currently being the 18th busiest airport in Europe, while Dublin Port is the 15th busiest container port in Europe. The Dublin city region sits at the centre of major road and rail networks which radiate outward to the north, west and south of the State.

Like the global economy, Dublin’s economy has continuously adapted and changed. In many respects, the tertiary related sectors of the economy, (i.e. the *‘services sectors’*) have remained strong, but many of the latest series of changes are based on knowledge. This includes the creation, comprehension and utilisation of data and information. The growth of this, the ‘*quaternary’* sector of the economy, referred to as the *‘knowledge sector’*, in the Dublin region is evidenced by the presence of global leaders in information communications technology (ICT)

By understanding the enterprise and employment landscape of the Dublin region, it is possible to conduct an analysis of Strengths, Weaknesses, Opportunities and Threats (SWOT), and the subsequent *‘pathways to delivery’* of the *Vision Statement* which contextualise this Regional Enterprise Strategy.

**Enterprise and Employment Profile**

**Enterprise and Employment Overview**

**The Dublin Region hosts a growing and highly educated labour force,** with current figures indicating a total ‘available’ labour force in Dublin of 657,200 in 2016[[13]](#footnote-13). With 611,700 people in employment, the unemployment rate has been on a steady decline in line with improvements in the wider economy. The labour force *‘participation rate’* stands at 63%[[14]](#footnote-14), indicating an active population, placing Dublin well to maximise its potential for continued economic, entrepreneurial and enterprise growth. Latest figures (for 2014) relating to enterprise and employment identify just over 75,700 businesses registered in the Dublin Region. Approximately 91% of these businesses employ fewer than 10 people, while only 2% employ more than 50 people within almost 1,480 companies, representing over 65% of the workforce in the Dublin Region. This illustrates the importance of a relatively small number of large companies, including many multinational companies, as key employers for the Region’s (and its adjacent areas’) workforce.

**Sectoral Overview**

Within the Dublin City Region there are a number of key enterprise sectors that provide the framework of the economic activity, and consist of **Administration, Professional Services, Tourism and Leisure, Education and Training, Manufacturing and Industry, Transport and Logistics, Construction, ICT and Technology and Retail and Wholesale,** as illustrated in Figure 1 below [[15]](#footnote-15).



**Figure 1: Dublin City Region Key Enterprise Sectors** (Source: FAC - 2016)

Each of these enterprise sectors of the economy experienced decreases in the number of people working within them between 2008 and 2011, as a result of the economic crisis. The number of people engaged in the sectors decreased by over 93,000 to just under 658,000 during this period, while at the same time the number of enterprises increased by 6%, based on new enterprise start-ups (Appendix 1), while outsourcing of selected services also became more common. This is mirrored by the average number of employees per enterprise falling from 9.2 in 2008 to 7.9 in 2014. Proportionally, the number of people employed in the *Construction* sector in Dublin fell by considerably more than any other between 2008 and 2011, approximately 52%, illustrating the extent of the difficulties in this industry. This is not a significant a decrease as the national figure of 58%. Employment in *Manufacturing and Industry* also declined by 17% during the crisis years.

During the early years of the economic recovery, 2011-2014, all sectors have experienced growth, with the exception of *Transport and Logistics*. *Manufacturing and Industry* increased its employment by 25% between 2011 and 2014; exceptional growth of 29% was recorded between 2013 and 2014. National growth in *Manufacturing and Industry* totalled only 4% between 2011 and 2014. At 11%, ICT and Technology had the highest levels of growth in employment between 2008 and 2014, bringing the total employed in this sector to over 53,000. This growth is also reflected in the number of enterprises that were in operation during the same period: growing by 34%. However, the number of people in this sector increased by 18% nationally.

Table 1 below provides an overview of the number of people engaged per sector in the Dublin Region (DR) and Nationally (Nat) between 2008 and 2014. Table 2 provides the relative changes in the number of people engaged per sector between 2008 and 2014.

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Enterprise Sector** | **DR**  **2008** | **Nat 2008** | **DR 2**  **009** | **Nat 2009** | **DR**  **2010** | **Nat 2010** | **DR**  **2011** | **Nat 2011** | **DR**  **2012** | **Nat 2012** | **DR**  **2013** | **Nat 2013** | **DR**  **2014** | **Nat 2014** |
| Administration | 67 | 108 | 60 | 95 | 58 | 92 | 58 | 94 | 60 | 96 | 62 | 98 | 64 | 104 |
| Professional Services | 214 | 286 | 196 | 256 | 197 | 254 | 200 | 257 | 206 | 263 | 211 | 272 | 219 | 283 |
| Tourism and Leisure | 58 | 151 | 56 | 141 | 53 | 136 | 51 | 134 | 53 | 138 | 55 | 143 | 59 | 149 |
| Education and Training | 36 | 140 | 31 | 114 | 35 | 140 | 35 | 141 | 36 | 141 | 36 | 142 | 37 | 144 |
| Manufacturing and Industry | 44 | 219 | 41 | 211 | 36 | 195 | 36 | 195 | 35 | 192 | 35 | 194 | 46 | 203 |
| Transport and Logistics | 63 | 81 | 59 | 74 | 58 | 71 | 57 | 70 | 56 | 69 | 55 | 70 | 55 | 71 |
| Construction | 46 | 146 | 33 | 96 | 25 | 70 | 22 | 61 | 21 | 56 | 22 | 58 | 26 | 67 |
| ICT and Technology | 49 | 64 | 45 | 57 | 45 | 58 | 46 | 60 | 48 | 64 | 52 | 71 | 54 | 75 |
| Retail and Wholesale | 174 | 349 | 161 | 321 | 153 | 305 | 152 | 303 | 152 | 302 | 155 | 308 | 155 | 313 |
| **Total** | **751** | **1,544** | **683** | **1,365** | **661** | **1,320** | **658** | **1,314** | **666** | **1,322** | **685** | **1,356** | **714** | **1,411** |

**Table 1: Number of People Engaged per Enterprise Sector – 2008-2014** (all figures in thousands) (Source: CSO, 2016)[[16]](#footnote-16)**.**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Enterprise Sector** | **DR**  **2008-2011** | **Nat**  **2008-2011** | **DR**  **2011-2014** | **Nat**  **2011-2014** | **DR**  **2008-2014** | **Nat**  **2008-2014** |
| Administration | -13% | -13% | 10% | 11% | -4% | -4% |
| Professional Services | -6% | -10% | 9% | 10% | 2% | -1% |
| Tourism and Leisure | -12% | -11% | 16% | 12% | 1% | -1% |
| Education and Training | -2% | 1% | 6% | 2% | 4% | 3% |
| Manufacturing and Industry | -17% | -11% | 25% | 4% | 3% | -7% |
| Transport and Logistics | -10% | -13% | -3% | 2% | -13% | -12% |
| Construction | -52% | -58% | 15% | 10% | -44% | -54% |
| ICT and Technology | -6% | -6% | 18% | 26% | 11% | 18% |
| Retail and Wholesale | -13% | -13% | 2% | 3% | -11% | -10% |
| Total | -12% | -13% | 9% | 9% | -5% | -5% |

**Table 2: Change in the number of persons engaged in work by sector, peak to trough, trough to 2014 and peak to 2014** (Source: CSO, 2016)[[17]](#footnote-17)**.**

The number of enterprises increased in 7 of the 9 sectors, with *Transport and Logistics* and *Construction* experiencing decreases of 5% and 15% respectively. The growth in the number of *Education and Training* and *ICT and Technology* enterprises was substantial, 35% to 3,594 and 34% to 5,735 respectively. These latter statistics are evidence of the growth of the knowledge economy and the vibrancy of the City Region’s start-up culture.

Full analysis of employees, people engaged in work by sector and number of enterprises can be reviewed in Appendix 1.

**Start-ups**

**Start-up activity in Dublin is growing significantly, particularly for technology related activity.** Across the sector in Dublin, over a quarter of active businesses were in the software, cloud, or Software As A Service (SAAS) fields[[18]](#footnote-18). **The most common start-up types were Health and Fintech, followed by data analytics. Tourism, biotech, education, security and sport were also well represented. Of those companies with employees,** **average employment is 31**, indicating the employment potential of the sector. In terms of the spatial distribution of these enterprises, the vast majority of start-ups are located within the Dublin City Council area (72%), followed by Dún Laoghaire Rathdown (12%). Dublin city is the primary location for start-ups, however, Dún Laoghaire Rathdown has a significant proportion of Dublin start-ups in sectors such as sales (50%), energy (46%), biotech (38%), apps (32%), and cloud computing (29%). South Dublin has its main strength in data analytics (20%). Fingal has 33% of the transport related start-ups.

The focus of this start-up activity is in the city centre and particularly Dublin 2 and 4. The next largest centre is at the **Digital Hub** in Dublin 8, followed by a number of third level based nodes, the largest of which are **UCD Nova, DCU Innovation Campus and Synergy and IT Tallaght.** Smaller hubs exist at **Dún Laoghaire town centre, IADT, Sandyford, Citywest and at IT Blanchardstown.**

**Enterprise Locations**

Business locations across the region vary widely in format and intensity as illustrated in Figure 2. Clustering analysis illustrates the distribution of different enterprises in 22 different locations across the Dublin Region. Dublin city centre provides the core of the Region’s enterprise activity and houses the most intensive employment uses in office accommodation. Office space vacancy, in particular in the city centre is low, with underlying rates in Dublin 2 and 4 of 6.3% and 7.1% respectively[[19]](#footnote-19). This is illustrated by the locations of the enterprise sectors that use this type of space and preferring central locations. ‘Financial and insurance’ enterprises are predominantly located in the city centre, with over 57% located in the IFSC/Docklands and D1/D2/D4 clusters. Similarly, ‘Professional, scientific and technical’ enterprises are present in all clusters, but exceed 15% of all enterprises in the IFSC/Docklands, ‘Inside Canal’, D1/D2/D4, Eastpoint, Sandyford/Leopardstown and Coastal Dún Laoghaire clusters. The Sandyford area is a growing suburban office location benefitting from its proximity to transport infrastructure and a catchment with high educational attainment. At 22% it is the cluster with the greatest number of ‘Professional, scientific and technical’ enterprises.

‘Wholesale and retail trading and vehicle repair’ account for over 20% of all enterprises in each cluster, except in IFSC/Docklands, Eastpoint and Damastown, where they are lower, ****totalling 9%, 10% and 15% respectively. However, nearly a quarter of all of enterprises in these sectors are found in the D1/D2/D4 cluster, demonstrating the city centre’s dominance as a retail destination.

‘Water supply and waste management’ enterprises are heavily located in the Ballymount cluster, with 20% of all of these enterprises located here. However, this accounts for only 1% of all the enterprises located in the cluster. 42% of ‘accommodation and food’ enterprises are in the D1/D2/D4 cluster, but only account for 16% of all those located there. Industrial estates and business parks, largely within close proximity to the M50 Motorway, provide for a high proportion of business activity in the region. Within these locations, up to a third of businesses are in *Retail and Wholesale* sector, although a growing proportion are in Professional, Scientific and Technical Activities, notably in Citywest/Baldonnell and in the Dublin Enterprise Zone. ‘Manufacturing’ activity is concentrated to the west of the city, notably in the vicinity of the *‘Ballymount’* and *‘Naas Road’* corridors. *Transport and Logistics* businesses are more prominent in the Ballycoolin-Dublin 15, Swords and Ballymount areas.

**Figure 2: Primary enterprise clusters of the Dublin Region.**

A full breakdown of the proportion of enterprises in each cluster and the proportional breakdown of enterprises by sector are available for review in Appendix 2.

****Future centres of enterprise growth are to be in the Region’s six Strategic Development Zones (SDZs) (Figure 3). While the Hansfield (Fingal County), Adamstown and Clonburris (both South Dublin County) SDZs will primarily cater for residential needs, they will provide some more localised enterprise and employment space. The Grangegorman SDZ (Dublin City) will emerge as a new centre for education and health. Dublin Institute of Technology is in the process of moving its dispersed campuses to one single location, serving over 20,000 students, while the HSE will also expand its health services. The North Lotts and Grand Canal Dock SDZ (Dublin City) has focussed on providing high density housing and high-end commercial space. This SDZ benefits from the existing enterprises in the Docklands area, including those in ICT and digital, finance and professional consultancy services. The planning scheme for the Cherrywood SDZ (Dún Laoghaire-Rathdown County) envisages housing of up to 8,336 units and up to 350,000 sq.m of high intensity employment space and a minimum of 77,000 sq.m of commercial space.

**Figure 3: The Dublin Region’s six SDZs - PLACEHOLDER.**

In addition to the six SDZs, there is clear potential for substantial enterprise development in other parts of the Region. The Dublin Enterprise Zone in Fingal and Grange Castle in South Dublin are just two examples of these, both developing as centres that are capable of realising large-scale, extensive FDI investment, such as Pharma and ICT (noted below as two of the enterprise ‘growth opportunity areas’). Other enterprise centres, such as Stephentown, Balbriggan in Fingal, are vital for promoting and sustaining local enterprise and employment and ensuring sustainable live-work patterns. The utility of these lands in terms of the economic performance of the Dublin region is tied to their capacity to accommodate enterprise related development as opportunities arise over the lifetime of this strategy.

**Research Centres**

The majority of Dublin’s **research capacity is centred around several of the city’s HEIs,** University College Dublin, Trinity College, Dublin City University, Dublin Institute of Technology (DIT) and the Institute of Technology, Tallaght (ITT). Thus, highlighting the role of these institutions beyond simply being destinations for education and training. Between them, **these five HEIs** **house or are affiliated with 20 of the 21 major research centres in the region accredited or funded by Science Foundation Ireland SFI and/or identified as being *‘Technology Gateways’* supported by EI.** UCD, the largest university in Ireland, is affiliated with eight of these centres, covering themes that include ICT, Health and Medical Technology, Sustainable Food and Energy. Trinity College is linked with eight of these institutions and DCU is affiliated with four. Additionally, there is one independent, government-financed centre and one centre that is a collaboration between the city’s three universities in the region and Sligo IT. DIT and ITT are both affiliated with one centre each. A full list of these research centres is a shown in Table 2, while the spatial distribution of a number of these can be reviewed in Figure 4. It is clear that for the most part, they locate in close proximity of higher level educational institutions as at UCD and Trinity/Docklands.

| **Research Centre Name** | **Location/Affiliate Institution** | **Research Focus** |
| --- | --- | --- |
| ADAPT | Dublin 2/Trinity | Digital Platforms, Content, Apps |
| AMBER | Dublin 2/Trinity | Medical Devices |
| ARCH | Dublin 4/UCD | Connected Health and Independent Living |
| BDI | Dublin 9/DCU | Connected Health and Independent Living |
| CeADAR | Dublin 4/UCD | Data Analytics, Management, Security |
| CONNECT | Dublin 2/Trinity | Future Networks, Communications |
| CREST | Dublin 8/DIT | Coatings Innovation |
| CRF | Dublin 8/Trinity | Clinical Research |
| FHI | Dublin 2/UCD | Food for Health |
| FMC2 | Blackrock/UCD | Digital platforms, Content, Apps |
| IC4 | Dublin 9/DCU | Digital platforms, Content, Apps |
| ICHEC | Dublin 2/Trinity | Digital Platforms, Content, Apps |
| iCRAG | Dublin 4/UCD | Marine Renewable Energy |
| IMR | Co. Dublin/DCU, Trinity and others | Manufacturing and Industrial Energy Efficiency |
| INSIGHT | Dublin 4/UCD | Data Analytics, Management, Security |
| Learnovate | Dublin 2/Trinity | Digital platforms, Content, Apps |
| MiCRA | Dublin 24/ITT | Bio-diagnostics |
| NIBRT | Co. Dublin/Trinity, DCU, UCD, Sligo IT | Therapeutics |
| SBI | Dublin 4/UCD | Diagnostics |
| SEES | Dublin 4/UCD | Marine Renewable Energy |
| Teagasc | Dublin 15/Teagasc | Food for Health |

**Table 3: Research centres in Dublin.**



**Figure 4: Research and technology centres in Dublin - PLACEHOLDER.**

**Workforce Profile**

An educated workforce is a significant attractant for foreign businesses and as a driving element behind developing and sustaining indigenous enterprises. In addition, the economic importance of higher level education is considerable, providing graduates with enhanced earnings potential. The Organisation for Economic Co-operation and Development (OECD) (2014) has demonstrated that **Irish third-level graduates will earn an average of €350,000 more than non-graduates during their working life;** while the benefits to the exchequer are a net return of €220,000 per graduate via taxation on increased earnings. This benefit is noted as being particularly acute in Ireland, which is two and a half times the OECD average[[20]](#footnote-20).

Dublin proves to have a well-educated workforce, with nearly **270,000 people having attained some form of third-level education[[21]](#footnote-21).** In addition, the Region’s population has also benefitted from further education and training, including technical and vocational courses, advanced and higher certificates and apprenticeships. The courses available through this latter series of educational options are vital to the functioning of the wider economy. The higher level of educational attainment translates to higher levels of GVA. Between 2008 and 2014 the relative importance of Dublin to the State increased as GVA grew to €74.5 billion, while its population as proportion of the national population remained static[[22]](#footnote-22).

**Promoting and Supporting Employment and Enterprise**

There is a significant level of supports and supporting organisations, agencies, etc., to ensure the development and growth in enterprise with the Dublin City Region.

1. The ***LEOs*** provide advice, information and support to start-up enterprises and existing businesses, including training and mentoring programmes and financial grants. Nearly 300 companies were assisted between 2013 and 2015, creating nearly 500 full-time equivalent (FTE) jobs[[23]](#footnote-23). These companies were in a range of different enterprise areas that included: Business Services, Clothing and Fashion, Craft, Food Production and Processing, Manufacturing and Software/IT. In terms of the amounts of funding issued, those companies in the engineering (€24,125) and packaging manufacturing (€27,927) sectors received disproportionately more than the other sectors, with the overall average provided to companies at €12,878. On average, each company/sole trader created an additional 1.7 FTE jobs between 2013 and 2015. The engineering field performed especially well, creating an average of 5.6 FTE jobs per company. However**, the environment/green technologies field had the greatest ability to convert funding to employment,** with an average of €2,615 of funding resulting in the creation of 1.0 FTE job. This is below the average of €7,795 required to create 1.0 FTE job. The electronics and medical device manufacture sectors proved to be the least efficient sectors at converting funding into employment, with €18,743 and €14,115 required to create 1 FTE job in the respective sectors.

The Dublin City LEO was the most active of the Offices, supporting 37% of those businesses availing of LEO assistance in the Dublin Region. The dominance of Dublin City in relation to work carried out by the LEOs is a reflection of the majority of Start-Ups locating there. Of the four local authorities, the Fingal LEO issued, on average per enterprise, the highest levels of funding at nearly €15,000.

2. The ***IDA,*** as the country’s leading state-sponsored agency in charge of encouraging FDI to Ireland, provides guidance and support to foreign businesses wishing to invest and develop enterprise opportunities with the Dublin Region. In 2015, the IDA-supported enterprises employed nearly 126,000, with 60% in foreign-owned companies[[24]](#footnote-24). Of these supported industries, the broad areas of production and manufacturing have had declining employment since 2007 (-27%), however, considerable growth (40%) has been achieved in the service and knowledge industries of *‘business, finance and other services’* *and ‘information, communication and computer services’*. These changes in enterprise and employment are demonstrative of the wider changes in the economy and the growth in the *‘quaternary’* parts of the economy.

*3.* ***Enterprise Ireland (EI)***, being tasked with the development and expansion of Irish enterprises in foreign markets, has significantly assisted Dublin-based enterprises centred on the requirement to *“start, grow, innovate and win export sales in global markets”*. EI provided funding of some €96 million to Irish enterprises in 2015, with approximately 30% (€29.2 million) provided to Dublin-based companies, particularly in the area of new *‘High Potential Start-Ups’* (HPSUs). **56 of the 105 HPSUs supported in 2015 were from Dublin.** Total EI supported job creation in the Dublin Region for the same year was 3,661, 36% of the national total.

**Skills and Talent**

As noted previously, ***Ireland’s National Skills Strategy 2025*** (2016) places a premium on skills development and life-long learning for all workers and potential workers. This is reinforced across the policy framework and supports the actions of the agencies in the region.

Dublin provides a wide range of third level institutions that perform a national as well as a regional role, with three internationally-ranked universities, three Institutes of Technology, institutions such as Dún Laoghaire Institute of Art, Design and Technology, National College of Ireland and the Irish Management Institute and private third level colleges and educational providers. These are supported by an active *‘Further Education and Training’* sector with courses delivered by the City of Dublin Education and Training Board and the Dublin and Dún Laoghaire Education and Training Board and direct training for unemployed provided by SOLAS. These providers are supplemented by a number of agencies that identify targeted educational and training needs for their membership or clients. This includes the Skillnet providers, the area partnerships and the Local Enterprise Offices etc.

SOLAS, in its annual National Skills Bulletin 2016, identified a series of employment areas that are undergoing a shortage of experienced employees. Amongst these were ICT, engineering, business and finance, healthcare, construction and education[[25]](#footnote-25). Determining future skills requirements requires careful monitoring of the market and industry practices, as employment and enterprise evolve. Currently, separate skills audits are also carried out by Enterprise Ireland, IDA Ireland and Skillnet[[26]](#footnote-26). In many cases, these cover similar skills requirements. There would be benefits in synthesising these separate assessments to deliver a more coherent and efficient network of courses. Similarly, there is competition between the training providers which can lead to duplication of courses and imperfect communications to employees and others seeking further education and training. The development of the ***Dublin Regional Skills Forum*** will bring together the primary agencies involved in education and training together with employers and the local authority sector. Responsiveness and information gathering is a key stage, bringing educators and employers together to speed up the identification of skills needs so that appropriate courses can match the changing needs of the regional economy. However, at present, graduates in the fields of science, technology, engineering, arts and mathematics (*‘STEAM’)* are heavily sought after for their technical and creative skills and ability. A wide range of employment directions can be taken by those with these educational backgrounds.

It is difficult to accurately project and assess possible skills shortages in the Dublin region over the coming years. The dynamics associated with economic growth and development may influence the accuracy of any projections. An example of this uncertainty can be found in the anticipated departure of the UK from the EU. As the period of this strategy coincides with the ‘Brexit’ negotiations between the UK and the EU, it would be prudent to have regard to the likely profile of affected industries and the mobility of their operations in order to acquire unfettered access to the Common Market through relocation from the UK. The financial services sector in particular is an example of an industry which has the capacity to reconfigure operations in a manner which may generate a demand for an appropriately qualified financial services labour force in the Dublin region. The ultimate determining factor in the possibility of the above arising is linked to the form of agreement which the UK and EU conclude. This uncertainty reflects the point above regarding the difficultly which one encounters while attempting to accurately determine the demand associated with the projection of key strategy skills in the labour force given the influences which external factors may have on the demand for sectoral skills and expertise.

Notwithstanding the above, as the Dublin region actively trades and competes with other European States, it worth considering the shape of that labour market over the coming years in terms of the potential sectoral areas which may see expansion in an Irish context over a comparable timeframe. A report published by the European Centre for the Development of Vocational Training in 2012 examined the likely trends associated with the expansion of employment sectors from 2012 to 2020[[27]](#footnote-27). This study reflects the traditional understandings in terms of labour market dynamics in terms of reflecting a decline in employment in the manufacturing sector, primary sector activities and utilities, reflecting patterns in employment change between 2000 and 2010. Growth in a number of sectors is projected across Europe in the areas below:

* Construction
* Distribution and Transport
* Business and Other Services
* Non-Marketed Activities (Public Sector)

The employment patterns projected at a European level are likely to manifest themselves in an Irish context, particularly in the Dublin region given its primacy in the Irish economy. The levels of growth associated with the sectors outlined above is predicated on an absence of macro and micro economic shocks associated with the global capital markets and a sustained recovery in terms of national finances.

**Strengths, Weaknesses, Opportunities and Threats Analysis**

Nationally, Dublin is the primary driver of economic development in Ireland with a scale and range of employment opportunities that greatly exceeds that of other centres in Ireland. **Dublin has consistently competed well as an international employment centre against bigger global locations, attracting investment across a range of sectors and industries and maintaining international attention as a world leader in areas such as IFS and ICT.** The city’s international reputation is supported through its prestige in creative industry and culture, its history and built environment, and its status as a capital city.

The decision to locate enterprise and employment in Ireland is led by a wide range of factors, including its location in an English speaking country within the European Union, its open economy, educated workforce, quality of life, ease of doing business and taxation policy. In addition, affordability and certainty on long-term stability for businesses are essential considerations for long term commitment to the country. Dublin benefits from all of these factors and provides a concentration of activity and a larger, more diverse labour force. However, attractiveness to mobile capital cannot be guaranteed into the future. The City Region faces some potential constraints and threats that could hamper continuing investment and employment growth.

While residents and the workforce of the Region enjoy a high quality of life, the availability of housing has become an issue. The cost of purchasing and renting residential property has risen significantly and forms a significant proportion of average disposable income. In some cases, investment in public transport has not aligned with residential development. This has made it difficult to deliver a labour force easily to key employment locations and can impact of on aspects of the quality of life of residents. **In addition, the availability of high-quality office space, particularly in the city centre is low, with potential limits on the ability of large FDI to be accommodated in the region in the medium-term.** However, offices in the planning and development pipeline that commenced as the economy began to recover will begin to become available soon. Incubation space for new businesses is provided across the region by a range of publicly supported and private providers, both as dedicated space and also as co-working space. A number of these centres have reached their capacity with extended waiting lists, reducing their ability to serve newer start-ups.

The **key challenge for Dublin is to continue to provide the environment to ensure that high quality job opportunities are created** to support a growing labour force. To achieve this, it is necessary to maintain trust and confidence that the principal stakeholders, including the State, Semi-State and local authority systems, will deliver the fundamental physical infrastructure, collaborative networks and supportive governance to facilitate enterprise and investment. With long-term strategic planning there can be more confidence as FDI companies will look to establish and develop a business stronghold and that indigenous firms and entrepreneurs look at the region as an attractive place to establish or expand.

The region acts as a magnet for employment, providing the jobs for a population of a wide commuting area from surrounding counties. While this extends the size of the labour force, it creates constraints on the capacity of the transport network and increase the carbon footprint of employees. The age profile of the county remains young. Nationality is diverse in the region contributing to a range of skills, languages and perspectives that support the development and dissemination of new ideas, products and cultures. While the city has a relatively high level of educational attainment, there remains pockets of deprivation, unemployment and low levels of formal education that inhibits the full involvement of all in the economic and social life of the region.

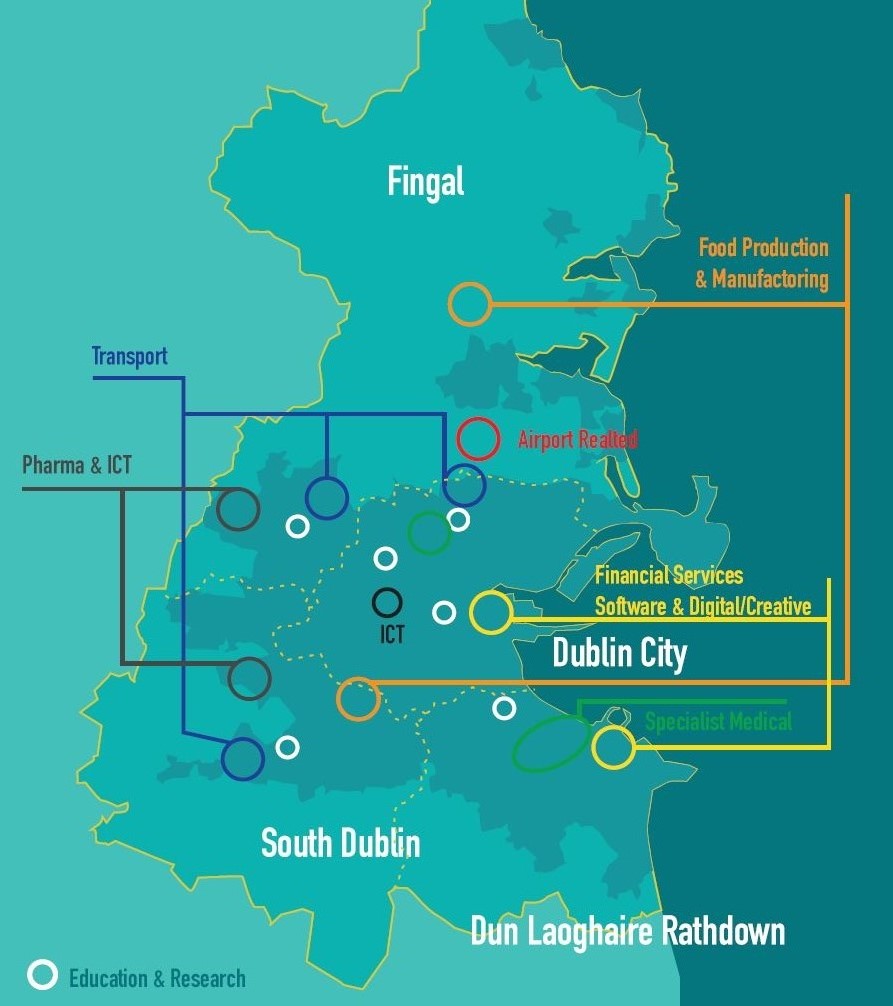
The national policy framework for job creation, enterprise and entrepreneurship comprises wide-ranging approaches to the evolution of enterprise and employment in the country. The regional remit of ***Action Plan for Jobs: Dublin 2016-2018*** will encourage a consultative and collaborative cross-agency approach to the roll out of initiatives and recognition of opportunities in the region. However, the process is still in its early stages and it will only be with full implementation can its success can be monitored.

There is a growing confidence in the Irish economy in developing start-up enterprises. The supports for this sector have increased substantially and include a greater degree of available information to aid entrepreneurs to locate services, facilities and related companies together with a supportive environment through the development agencies, such as LEO and EI. **Concentrations of such businesses have been identified across the region, with noticeable clusters located in the city centre, docklands, the Digital Hub, and in, or in close proximity to the universities other third level institutions.** This trend is strengthened through the major Technology Centres in Dublin being similarly located within the university sector. **This has led to a spatial imbalance of start-up activity in the region.** However, other hubs of activity are developing, notably in Dún Laoghaire town centre and in the vicinity of Citywest.

The environment to encourage and support entrepreneurship is improving in the region as evidenced by the increase in activity in new business formation. The needs of entrepreneurs and small business owners requires continuous delivery and enhancement, through excellent internet connectivity, linkages to a thriving and vibrant civic life to enhance the ability for cross fertilisation of ideas and collaboration, availability of affordable business location, availability of required talent, and supporting incentives and supports. Improved communications can assist existing businesses to be aware of the opportunities to scale-up operations and of the range of supports available to bring innovation to their businesses.

While employment levels fell between 2008 and 2011 during the economic crisis, growth has returned, particularly in the sector of *Manufacturing and Industry*, *Tourism and Leisure* and *ICT and Technology*. Contrasting with these declines, the number of active enterprises in the Region increased and new start-ups began to emerge, notably with considerable growth in ‘tech’ areas, locating in Dublin City centre.

Like Dublin, Lisbon, Portugal, is also a hub for start-up activity and has been recognised by receiving the *European Entrepreneurial Region* award in the 2015. The start-up culture of Lisbon, in conjunction with its expanding and improving infrastructure, have been cited as reasons for *Web Summit’s* relocation to the Portuguese capital. Dublin’s entrepreneurial and innovative capacity reflects that of Barcelona. Barcelona’s *‘22@ District’* is, similarly to the Dublin Docklands SDZ, targeted for regeneration, placing an emphasis on technology, innovation, leisure and residential development. As noted, Dublin’s enterprises in the environment/green technologies field have proven to be highly successful at creating employment using LEO funds and support. This area of enterprise has significant potential for expansion and success in the future and CleanTech is note below at a potential ***‘growth opportunity area’***. Copenhagen, the Capital of Denmark, has already recognised the importance of *“Green Growth”* in its ***‘Regional growth and development strategy: Greater Copenhagen’[[28]](#footnote-28)***, with ‘Green’ companies in the capital region already comprising 12% of the State’s total exports. Investing in and promoting green infrastructure and enterprise has positive outcomes for both the environment and enterprise and employment.

**Potential ‘Growth Opportunity Areas’**

Through analysis and consultation, **eight** ***‘growth opportunity areas’*** are identified to have significantly development and growth potential within the Dublin City Region. These growth areas are considered to be those with significant potential for enterprise and jobs creation. In some instances, like **Pharma** and **Tourism**, they are well established industry areas that show continued signs of growth and expansion, while others are emerging and changing, such as **International Financial Services, CleanTech and Software and Digital.** As illustrated in Figure 5, the growth opportunity areas are clearly found in clusters across the City Region. In many instance, these growth opportunity areas relate to the fields in STEAM and will require a continued supply of high quality graduates and enterprise space.

The following provides an overview of these ***‘growth opportunity areas’*** in terms of future potential and development:

**Figure 5: Clustered Growth Opportunity Areas across Dublin City Region** (Source: FAC - 2016) **– PLACEHOLDER.**

**Design and Creative Industries**

There is evidence of the clustering of the creative sectors in the inner and south-east parts of Dublin City centre, with a smaller cluster of activity in Dún Laoghaire town centre. Wider definitions include activity in the technology sector, where creativity can form part of the design process, as well as including the more technical parts of the media, such as post-production and social media. While important across a range of sectors, **design is critical to success in new and emerging sectors** like medical devices, ICT, gaming, mobile communications and both traditional and social media. The film industry is strong and there are synergies between the infrastructure in Co. Wicklow and the facilities, skilled labour and creativity of the Dublin area.

**Food Industry**

North County Dublin has a rich tradition of agri-food activities and in particular, horticulture production, being home to 75 of the approximately 270 Bord Bia quality assured horticulture producers, pre-packers and preparers in the country**. Fingal caters for some of the country’s most successful horticultural-based businesses and clusters of activity.** The food manufacturing business in Dublin is dispersed across the region, with some concentrations in proximity to the M50 and also a cluster in the vicinity of the city centre, a beneficial location for access to the large urban market.

**The Green Economy - CleanTech and Environment**

The Green Economy 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. It includes activities in areas such as Sustainable Food Production, Tourism, Green Financial Services, Waste Management, Renewable Energy, Smart Grids and Energy Efficiency. From an Irish context, the green economy’s contribution to the overall national economy was previously estimated at €2.8 billion by Forfás[[29]](#footnote-29) (2009), with the Sustainable Energy Authority of Ireland (SEAI) (2014) estimating that €1.4 billion -€1.6 billion is invested annually in the Irish sustainable energy supply chain[[30]](#footnote-30). CleanTech as an industry has a broad range of activities encompassing the development, production and deployment of goods and services that help organisations and individuals become more resource-efficient, where resource refers to energy, water and/or waste (The Green Way, 2014). Over the last number of years, Ireland has successfully built up an international reputation for its sustainability and CleanTech successes. Particular core competencies developed by the CleanTech industry in Ireland centre on energy production and distribution through its wide-scale involvement in renewable infrastructure development, construction and operation.

**International Financial Services**

As part of the new ***International Financial Services Strategy 2020[[31]](#footnote-31)*** (2015), **a major focus is being placed on driving additional employment in FinTech** companies by encouraging collaboration between Ireland’s IT and Financial Services sectors. Ireland is the last major landfall linking the US and European financial sectors and the availability of data centres and high-speed transatlantic fibre means Ireland is a strategic location for trading. When combined with its growing international reputation for ICT, this places Dublin in a strong position to benefit from growth in the sector. Numerous commentators have highlighted the potential opportunities that could be exploited as a result of the ‘BREXIT’ vote. Access to the common market and the benefits of EU are important considerations for many financial companies, and combined with Ireland’s tax system, excellence in the English language and the presence of existing financial actors makes Dublin an attractive alternative to the UK.

**Pharma/BioPharma**

**Irish exports of medical and pharmaceutical products totalled over €14.4 billion** in the first half of 2016, accounting for 26% of the national total. This important sector of the Irish economy has shown signs of clustering, with the **emergence of hubs of activity based in Dublin, particularly at Grange Castle (South Dublin) and the Dublin Enterprise Zone (Fingal).** Promoting the pharmaceutical industry is a key element of the ***Action Plan for Jobs 2016***(2016) and the***Action Plan for Jobs: Dublin*** ***2016-2018*** (2016) with the Government intending to further leverage the IDA and EI. A series of job announcements in 2015 and 2016, as well as billions of euro in investment is evidence that the pharmaceutical industry is strengthening its presence here. The jobs created by the industry are of a high-quality, with the vast majority employed in the field having attained a third-level qualification. It will be vital for the education system to continue to produce talented graduates of the STEM subjects; science, technology, engineering and maths, as this is deemed to be an asset for maintain and attracting further investment by pharmaceutical companies.

**Software and Digital**

The presence of several large IT and digital companies has provided an impetus for the development of numerous tech-based start-ups. As indicated by LEO data, Software/IT enterprises have been the most numerous in seeking support, receiving some €700,000 in funding since 2013, and the second highest at creating employment. The FinTech sub-area in particular has been recognised as having appreciable potential for expansion and is closely related to the IFS opportunity area discussed above. **Other sub-areas with potential for growth include TravelTech** (travel technology innovation), **Health** and **DeepTech** (emerging enterprises centred on unique, differentiated, technological and scientific advances). Key locations in which this opportunity area is likely to grow are the Dublin Docklands area (Dublin 2 and 4), Dún Laoghaire and in the Digital Hub area of the city centre Liberties area. The Sandyford/Leopardstown area of Dún Laoghaire-Rathdown is also a software and digital centre, with the well-established presence of several, and is likely to continue to consolidate and evolve during the life of the strategy.

**Tourism**

With some 5 million overseas visitors spending time in Dublin there is considerable potential to expand the numbers visiting the Region[[32]](#footnote-32). The Dublin Region has a wide range of facilities and attractions for visitors, including 5 of Ireland’s top 10 fee paying attractions and 8 of Ireland’s top 10 free attractions. The Region has considerable assets, including the Dublin Mountains and the maritime environment (particularly at Dún Laoghaire), and should be beneficially and sustainably expanded in their use. *‘Dublin – A Breath of Fresh Air’* is the new brand and marketing campaign for Dublin that is seeking to leverage the amenities and assets of the Region. Tourism, as a very broad opportunity area, is **comprised of several different sub-areas, including: accommodation, food and drink, leisure, cultural and entertainment activities, and retailing.** Consequently, targeting this area will have broad benefits to enterprise and employment creation with every million euro of tourist expenditure supporting 29 tourism jobs, while the gains for wider economy are significant with every euro spent on tourism generating 23 cents in taxation[[33]](#footnote-33).

**Education and Training**

There was an increase in the number of people employed in the *‘Education and Training’* sector between 2008 and 2014 (4%) and it experienced the smallest decline of all sectors in the initial years of the economic crisis (-2% employment), even in the context of substantial cutback. Full-time and part-time enrolments in Dublin’s HEIs exceeded 110,000 in the 2014-2015 academic year[[34]](#footnote-34), [[35]](#footnote-35). **National** **demand for full-time, higher level education in Higher Education Authority (HEA)-aided institutions is projected to reach approximately 178,000 places by 2019 and over 207,000 by 2029.** The vast majority of this demand will be focussed in the Dublin Region as the educational centre of the State. The Government has recently sought to target international students in its ***Irish Educated, Globally Connected: An International Education Strategy for Ireland, 2016-2020*** *(2016*)[[36]](#footnote-36), with the intention of attracting them to come to study in Ireland. Two distinct opportunities are possible through further commitments to Education and Training. In the first instance, it can be **made available to international students,** coming to Ireland to study, thus promoting Ireland as a destination for education. Nationally, an increase to €2.1 billion in the value of international students is being sought by 2020. Secondly, by continuing to provide a high quality educational system that aligns closely to the requirements of industry, **graduates will garner relevant skills and knowledge and will be more productive in the workplace and attractive to FDI.** This will ensure that Ireland maintains and improves its appeal as a destination with an excellent workforce.

# Section 4: Developing an Enterprise Strategy for the Dublin Region

**A Vision for Enterprise in the Dublin Region**

In order to determine how and in what way the Dublin Region should develop as a centre for enterprise development it is necessary to provide a *‘Vision’* of the optimal *‘state’* of the Region. Understanding the existing enterprise landscape, as well as the policy context, outlines the *‘now’*. The Vision proposes the overarching *‘future’* and is intended to be progressive and aspirational. The Vision seeks to ensure that the Region is imbued with an inherent entrepreneurial and forward-thinking environment, where business and enterprise ideas are developed, nurtured and supported. The enterprise environment will be assisted through a high-quality living and working environment that attracts and retains a skilled and adaptable employment base.

Accordingly, the **Vision Statement** for the Dublin Regional Enterprise Strategy is…:

***“… for the creation of a sustainable, globally competitive and innovative destination for enterprise development and living”.***

**The Strategic Pathway**

Working from this Vision, **a *‘Strategic Pathway’*** (Figure 6 below) has been used to create a series of key ***‘Enterprise Strategy Actions’***. It is these actions that, when cumulatively implemented by the four local authorities and relevant partners, agencies, etc., will direct the Region towards its enterprise Vision. The actions are assigned to short (0-12 months), medium (12-36 months) and long term (36+ months) timeframes.



**Figure 6: Strategic Pathway to Development of Enterprise Strategy Actions and   
Attaining the Enterprise Vision for the Dublin Region**

Progressing from the Vision, key *‘Enterprises Drivers’*, responsible for promoting and attracting enterprise development were identified. These drivers are broad principles for future success and have been informed by enterprise policy and the current enterprise landscape, supplemented by engagement with key stakeholders. The drivers include not only the potential *‘growth opportunity areas’* outlined previously (Food Industry, Tourism, Software and Digital etc.), but also opportunities where Dublin can enhance its standing, such as meeting the needs of entrepreneurs and enterprises, education and training, the culture of entrepreneurship and city positioning. Recognising and understanding these enterprise drivers allows for *‘Objectives’* to be established – one for each driver.

To deliver the objectives, a series of *‘Recommendations’* are established. The recommendations identify how the objectives can be achieved and have been assigned to a single, most relevant objective. It is important to note that the recommendations can contribute to achieving more than one objective.

Ultimately, specific target *‘actions’* can be formulated. **These actions are the mechanisms through which the recommendations, and thus, the objectives, will be secured.** Actions are assigned for implementation at a coordinated regional level but also at local level by individual local authorities. Each action is subsequently prescribed with a timeframe for delivery, a note on any supporting partners and a monitoring or measuring method.

**Objectives: Achieving Dublin’s Future Enterprise Landscape**

The enterprise environment of the Region is subject to constant change and adaptation in response to; competitive pressures; new practices, products and technologies; changing Irish and international economic conditions; and the growing entrepreneurial culture. The recession and subsequent economic recovery have resulted in substantial changes in the mix of business and enterprise. There are significant growth opportunities across the entire economy as it continues to recover. While manufacturing is shifting towards high-end, high-tech products, the enterprise sectors within the tertiary economy (services) are consolidating as the quaternary economy (knowledge-based activities) continues to expand.

The objectives, to achieve a prosperous and innovative future enterprise landscape and attain the enterprise Vision for the Dublin Region, are outlined below.

**First Driver: *City Region Promotion***

The Dublin Region has developed a series of identities when portrayed internationally. It is well known as the capital of Ireland, as a tourism centre, a UNESCO[[37]](#footnote-37) city of literature and as a growing centre of the digital economy. However, this has not translated into a unified, integrated package for enterprise that showcases the various opportunities that exist across a range of sectors. While Dublin has been extremely successful in attracting FDI, a common message and vision could assist IDA Ireland, EI, government agencies, the local authorities themselves and others in further improving the performance of Dublin to attract the type of enterprises in which it seeks to excel in.

***Objective 1***

*The local authorities will collaborate to develop a unified vision and enterprise proposition for the Dublin Region, with an international focus to attract FDI and a highly skilled and talented workforce.*

**Second Driver: *Entrepreneurs and Enterprises***

For the Region’s economy to flourish, it is essential that the needs of the existing and future enterprise community are assisted and supported. It is vital that this is directed for both indigenous and foreign ventures. The local authorities play a key role in delivering a supportive enterprise environment. The needs of enterprise are diverse and cover a range of areas where the local authorities have a direct or an indirect role, including the timely facilitation of physical premises, provision of and connectivity to infrastructure such as water, power, transport, broadband, etc. It also relates to softer assistance such as the provision of business and enterprise supports, the dissemination of information and knowledge, and the development of networks. Certainty around the future delivery of such infrastructure and support gives surety and comfort to existing and new enterprises that their aspirations can be delivered over the long-term.

***Objective 2***

*Through work with other bodies, agencies and businesses, the local authorities will act to deliver a high-quality, efficient, responsive and supportive enterprise* *environment for all businesses in the region.*

**Third Driver: *‘Growth Opportunity Areas’***

At a strategic level, there are a number of key potential growth opportunity areas that drive the major objectives for the development of enterprise in the Region. As a result of determining the current enterprise landscape and from the extensive consultation exercise, a number of opportunity areas have been identified that can contribute to the Region’s enterprise success. In many respects they represent the consolidation of the tertiary strand of the economy and an expansion of the emerging quaternary sector. These growth opportunity areas include Design and Creative Industries, Food, CleanTech, International Financial Services, Pharma/BioPharma, Software and Digital, Tourism, and Education and Training. These areas build on the education, expertise and established business and enterprise knowledge of Dublin and have started to develop geographical clusters across the Region. Targeting investment decisions and aligning agency decisions to support the further development of these clusters will be a core objective of the strategy.

***Objective 3***

The local authorities will work collectively to promote and foster enterprise in the identified ‘growth opportunity areas’, and to entice FDI to Ireland.

**Fourth Driver: *Skills, Education and Training***

In a rapidly changing enterprise environment, upskilling and the development of new skills is essential to meet the challenges of competition. The local authorities have a role to play in facilitating awareness of training supports and educational opportunities, particularly through the LEOs, but also more widely across its business networks and connection with third level institutions. The roll out of the Dublin Regional Skills Forum will also give the local authorities a direct role in identifying skills gaps and developing responses.

***Objective 4***

*Through collaboration with other agencies, the local authorities will encourage and facilitate targeted educational and training initiatives to meet the current and emerging future needs of enterprise.*

**Fifth Driver: *Entrepreneurial Culture and Innovation***

Growing an entrepreneurial culture can benefit the regional economy in many important ways. It can empower those people who have business ideas to make them happen, adding to national economic performance and often identifying opportunities that are local, innovative and transformative. To develop this culture, it is necessary to ensure that society values and supports those who take risks, have innovative ideas and value creativity. This is a long-term and complex societal process, applying to those of all ages and should be inclusive of all segments of society. The local authorities can assist in this process through the promotion of enterprise, both within and outside its client base, as well as to a wider audience, from schools to the wider communities in the Region. The contribution of those groups who have traditionally been under-represented in enterprise offers a significant opportunity to bring diversity, novel ideas and skills.

***Objective 5***

*The local authorities in the Region will promote a culture of entrepreneurship and innovation across the wider community through supports, promotion, marketing and branding initiatives.*

**Recommendations for Enterprise Development and Growth**

The objectives as set out above give the context that allows for the identification of recommendations for the future delivery and promotion of enterprise development by the local authorities. These recommendations are strategic in nature and represent activity that the local authority system can deliver, having a transformative effect on the Dublin enterprise environment and addressing the underlying drivers for enterprise performance as described in the objectives. While a number of recommendations, as put forward in Table 3 below, are grouped under a key objective, often these relate to two or more of the objectives, due to the interconnected nature of the enterprise environment.

The recommendations act in partnership with the ongoing work carried out by the local authorities that supports enterprise development, including, in particular, the work of the LEOs, and the Economic Development and Land-use Planning functions of the local authorities. These recommendations are developed into regional actions for delivery in the short, medium and long-term (see Section 5), which are also distinct for each local authority level where this is relevant.

| **Objective** | | **Recommendation** | |
| --- | --- | --- | --- |
| 1 | The local authorities will collaborate to develop a unified vision and enterprise proposition for the Dublin Region, with an international focus to attract FDI and a highly skilled and talented workforce. | 1.1 | Develop a ‘Dublin Regional Enterprise Brand’ and proposition for national and international promotion. |
| 1.2 | Apply to the *European Entrepreneurial Awards*. |
| 2 | Through work with other bodies, agencies and businesses, the local authorities will act to deliver a high-quality, efficient, responsive and supportive enterprise environment for all businesses in the region. | 2.1 | Develop a coordinated approach to promoting and supporting models of enterprise space across the Region. |
| 2.2 | Further enhance the effectiveness and targeted nature of the LEO business support system. |
| 2.3 | Create a Business Opportunities Register to provide better access to enterprise related information and to develop enterprise development. |
| 2.4 | Assess the amount, availability and type of land and business space. |
| 3 | The local authorities will work collectively to promote and foster enterprise in the identified ‘growth opportunity areas’, and to entice FDI to Ireland. | 3.1 | Target the delivery of start-up space/incubation space for the promotion of enterprise in the *‘growth opportunity areas’*[[38]](#footnote-38). |
| 3.2 | Facilitate the synergistic clustering of enterprises. |
| 3.3 | Publicise across the Region the opportunities for education, training and upskilling, enterprise and employment growth within the identified ‘growth opportunity areas’. |
| 4 | Through collaboration with other agencies, the local authorities will encourage and facilitate targeted educational and training initiatives to meet the current and emerging future needs of enterprise. | 4.1 | Through collaboration and coordination improve information flows in developing education and training plans and the monitoring of outcomes. |
| 5 | The local authorities in the Region will promote a culture of entrepreneurship and innovation across the wider community through supports, promotion, marketing and branding initiatives. | 5.1 | Support the provision of enterprise training, including targeting communities with higher levels of unemployment or deprivation and lower levels of educational attainment. |
| 5.2 | Promote social entrepreneurship as an enterprise area. |

**Table 4: Recommendations for Dublin Regional Enterprise**

# Section 5: Actions for Enterprise Delivery

The key *‘objectives’* and associated *‘recommendations’* enable the clear and focused formulation of specific target *‘Enterprise Strategy Actions’* that will guide and direct the enterprise strategy of the Dublin Region. These actions are the mechanisms through which the recommendations will be secured.

**Business Opportunities Register**

The Business Opportunities Register (BOR) is one of the key actions included in the list below. It is proposed as being an online (and potentially offline) enterprise facilitation and promotion service initially harnessed through the *‘Working’* section of the www.dublin.ie website. **The purpose of the BOR would be to provide entrepreneurs and business owners/managers with the most appropriate and up-to-date information, resources and databases required to promote enterprise growth and support.** The BOR would be the location from which they could be directed to garner, the relevant resources required for successful enterprise; including, space, finance, employees, training, mentoring, etc. Importantly, the BOR would not duplicate existing online resources and services, but complement them and augment existing supports and structures. The premise of the BOR would be akin to the www.supportingsmes.ie website, in that an entrepreneur or business owner/manager inputs the relevant details and requirements and the BOR provides the appropriate information and resources. However, the BOR would be a more comprehensive and complex (but accessible and user-friendly) service.

The BOR would also be a forum at which entrepreneurs and business owners/managers could publicise or advertise their specific requirements (similar to a tender process). Accordingly, and importantly, the BOR would be a mechanism through which those involved in enterprise development – ‘*facilitators’* – could publicise (or even advertise) their services, resources and opportunities. As examples, these facilitators may: run training courses or mentor programmes, provide non-traditional funding options (e.g. crowdfunding, LinkedFinance etc.) or have vacant incubation space.

Crucially, not only would the BOR be for entrepreneurs and enterprises, but it would also be a service platform for all entities involved in enterprise development and employment creation (see Figure 7). The principle of the BOR is to ‘match up’ the entrepreneurs and enterprises with a particular need or requirement to the facilitators that can address that need or requirement. While for the facilitators, it is a platform through which they can improve their own enterprise prospects; for example, identifying new investment opportunities, acquiring new tenants or expanding training programmes.

The BOR may also be a method for sourcing employment/employees. As an additional element of the service, individuals could upload their details and CV and assign themselves to enterprise sectors. Entrepreneurs and business managers in their search for new, talented staff could search through the listed individuals in the appropriate sectors to identify future employees, but they could also advertise positions. The listings could also distinguish between those seeking full-time, part-time, permanent or temporary/contractual employment. In addition, the BOR could be a platform for identifying and publicising further and higher education and training opportunities, through a register of courses collated and regularly updated, utilising the www.fetchcourses.ie as the basic premise.

A socio-economic and infrastructure viewer/dashboard would also be available on the website. This would allow entrepreneurs and enterprises to carry out some of their own research and assessment by making what is publicly available information (CSO and Government Department data) easily accessible and locating it in a place of direct relevance (like Dublinked, but in an immediately usable format like Myplan or DublinDashboard). Census data would reveal a wide range of different things for those interrogating the information: market sizes, quality of the workforce (education and training), age of population, housing stock, economic activity, disposable income and much more. The incorporation into the dashboard of enterprise clusters could also be included to identify where particular strengths and assets may be found and also promoted by the relevant authorities and agencies. This would be of benefit to any entrepreneur, business manager or business owner wishing to make informed decisions and target new opportunities.

Amongst the target users of the BOR are the following:

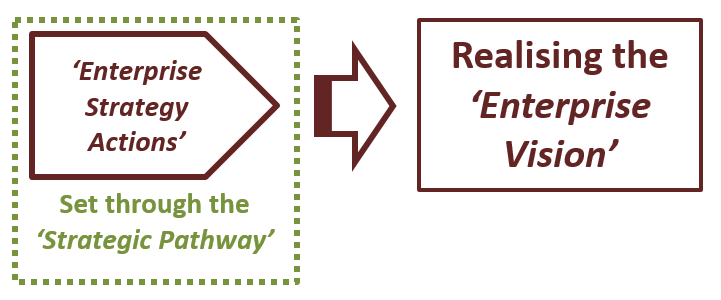
* Information and Support Providers (e.g. LEO, EI, IDA etc.)
* Entrepreneurs and Enterprises
* Space Providers and Landlords
* Financiers and Monetary Granting Agents
* Educational and Training Providers
* Mentors
* Consultants (e.g. Market Research, Planning, Business Support, Accountancy, etc.)
* Unemployed and others seeking alternative, new or additional work
* Networks (e.g. Chambers of Commerce, Business Associations, Business Improvement Districts, Plato etc.)
* Higher Education Institutions (HEIs): Universities, Colleges and Institutes of Technology
* Prospective Students

**Figure 7: The users of the BOR.**

**Enterprise Strategy Actions**

The actions have been **informed by the assessment of the enterprise landscape and consultation with stakeholders, while also being consistent with national, regional and local policy.** They are derived at regional level and are also detailed at local authority level, where relevant. The actions are strategic in nature and have been assigned a timescale for their implementation, together with a prescribed responsible actor(s) (including non-local authority partners/agencies). Each action is given a measuring and/or monitoring mechanism to determine its progress and/or outcome. At regional level, it is necessary for all four local authorities to work together and coordinate their activities to ensure the success of the relevant action.

Overall, the actions are set within, and central to, the *‘strategic pathway’* of the enterprise strategy, and address the *‘key enterprise sectors’* and identified *‘growth opportunity areas’*, as illustrated in Figure 8 below.



**Figure 8: Enterprise Strategy Actions Central to the Enterprise Strategic Pathway for the Dublin Region**

The Enterprise Strategy Actions are as follows:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Recommendation Reference No.** | **Action No.** | **Key Action** | **Local Authority** | **Timeframe** | **Partner / Supporting Agency** | **Monitoring/ Measuring** |
| 1.1 | 1 | Using the dublin.ie website as a medium, create and develop an agreed 'enterprise brand' for the Dublin Region to be promoted nationally and internationally. | Regional / All LAs | S | N/A | Brand created and representative appointed. |
| 1.2 | 2 | Coordinate and collaborate to lodge an application to the EU Committee of the Regions for the *European Entrepreneurial Region* (EER) awards by the end of the Strategy’s lifetime. | Regional / All LAs | L | N/A | Application lodged. |

**Driver:** City Region Promotion

**Objective 1:** The local authorities will collaborate to develop a unified vision and enterprise proposition for the Dublin Region, with an international focus to attract FDI and a highly skilled and talented workforce.

| **Recommendation Reference No.** | **Action No.** | **Key Action** | **Local Authority** | **Timeframe** | **Partner / Supporting Agency** | **Monitoring/ Measuring** |
| --- | --- | --- | --- | --- | --- | --- |
| 2.1 | 3 | Create an Action Plan to promote, facilitate and incentivise the uptake of vacant and underutilised enterprise space (retail, commercial, industrial, etc.), and to identify and address key infrastructural barriers and increase progression from supported enterprise space. Example: consider use and expansion of SDCC's *'Business Support Grants'*. | Regional / All LAs | M | N/A | Action plan prepared and enacted. |
| 2.2 | 4 | Enhance the interrogation of the DJEI's Annual Employment Survey to determine the success of LEO supports in the creation of jobs and the promotion of enterprise, with the aim of being able to more appropriately and effectively assign funds and support. | Regional / All LAs | S | DJEI, EI | Enhanced analysis of data and better informed decision-making. |
| 5 | LEOs to act to increase their involvement in, and presence at, conferences and showcases, including those related to venture funding, innovation and emerging enterprise areas. | Regional / All LAs | M | HEIs, Private enterprises | Number of entrants and attendees. |
| 2.3 | 6 | Develop an online 'Business Opportunities Register' under the 'Working' section of the Dublin.ie website, to be the first place where enterprises and entrepreneurs go to avail of key information and other resources.[[39]](#footnote-39) | Regional / All LAs | S | As per description above | Number of users of registered. |
| 2.4 | 7 | Conduct a 'census of enterprise space' / 'land availability study' with the purpose of determining the total quantum and type (industrial, retail, office, other niche sectors) of business space available to enterprises and the potential capacity for zoned lands to deliver business space. | Regional / All LAs | S | N/A | Report published. |

**Driver:** Entrepreneurs and Enterprises

**Objective 2:** Working with other bodies, agencies and businesses, the local authorities will act to deliver a high-quality, efficient, responsive and supportive enterprise environment for all businesses in the region.

| **Recommendation Reference No.**  **Driver:** Growth Opportunity Areas  **Objective 3:** The local authorities will work collectively to promote and foster enterprise in the identified ‘growth opportunity areas’, and to entice foreign enterprises in these area as well as FDI to Ireland | **Action No.** | **Key Action** | **Local Authority** | **Timeframe** | **Partner / Supporting Agency** | **Monitoring/ Measuring** |
| --- | --- | --- | --- | --- | --- | --- |
| 3.1 | 8 | Support the provision of flexible incubation and kitchen space for emerging food start-ups and food training and education courses throughout the Region. | Regional / All LAs | L | The Dublin Food Chain | Number of units available in the region. |
| 3.2 | 9 | Identify and promote Dún Laoghaire town as a new Digital, Creative and Technology Hub for the Region. | DLRCC | L | Digital Dún Laoghaire, Dún Laoghaire BID, Commissioner for Start-Ups, IADT | Digital, Creative and Technology Hub promoted and number of new enterprises established and employment created. |
| 10 | Promote Grange Castle and the Dublin Enterprise Zone for large-scale, extensive FDI investment and activity in the Dublin Region using consistent branding, signage and landscaping in each. | SDCC, FCC | S | IDA, EI | Number of new enterprises and employees and level of investment. |
| 11 | Explore collaborative *'Mountains to the Sea'* tourism opportunities in the context of the *'A Breath of Fresh Air'* tourism marketing campaign to promote the Region's marine and mountain amenities. | Regional / All LAs (as relevant) | S | Fáilte Ireland | Opportunities identified and plans implemented. |
| 12 | Organise a collaborative FinTech event targeted at the Region's IFS and ICT sectors. | DCC | M | N/A | Number of attendees. Assess potential for making this an annual event. |
| 13 | Develop a plan to maximise the visibility of local food products as part of the tourism offer of the Region. | Regional / All LAs | M | Private enterprises | Plan prepared and delivered. |
| 14 | Utilise the outputs of Action 73 of the *Dublin Action Plan for Jobs 2016-2018* to pilot a best-practice, collaborative, multi-departmental town/village centre improvement initiative, involving the relevant departments of the local authority, as well as local representatives and stakeholders (residents, retailers etc.), with the purpose being to enhance local placemaking and economic vitality. Example: an expansion of the *'Stimulating the Balbriggan Economy'* action plan. | Regional / All LAs | M | Private enterprises, local residents | Completion of pilot and assessment for roll-out. |
| 3.3 | 15 | Promote the principles of CleanTech in all enterprises | Regional / All LAs | S | Sustainable Nation Ireland | Number of new Sustainable Nation Ireland members. |
| 3.3 | 16 | Develop a ‘Dublin for STEAM’ event to encourage greater awareness of the current and emerging ‘Growth Opportunity Areas’ for the region amongst secondary-level students and entrepreneurs. | Regional / All LAs | S | HEIs, Secondary level, HEA, Private enterprise | Number of attendees. Assess potential for making this an annual event. |

*(Objective 3 Actions Continued)*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Rec. Ref. No.** | **Action Ref No.** | **Key Action** | **Local Authority** | **Timeframe** | **Partner / Supporting Agency** | **Monitoring/ Measuring** |
| 4.1 | 17 | Local Authorities to work with ETBs and other training course providers to coordinate the streamlining of courses with the aim of improving the delivery of targeted courses to meet specific needs and to minimise inefficient duplication of training and certificate-level courses. | Regional / All LAs | M | Training providers in the Region | Updates and alignment of training programmes to industry and personal requirements. |

**Driver:** Skills, Education and Training (Continued)

**Objective 4:** Through collaboration with other agencies, the local authorities will encourage and facilitate targeted educational and training initiatives to meet the current and emerging future needs of enterprise.

**Driver:** Entrepreneurial Culture and Innovation

**Objective 5:** The local authorities in the Region will promote a culture of entrepreneurship and innovation across the wider community through supports, promotion, marketing and branding initiatives.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Rec. Ref. No.** | **Action Ref No.** | **Key Action** | **Local Authority** | **Timeframe** | **Partner / Supporting Agency** | **Monitoring/ Measuring** |
| 5.1 | 18 | Facilitate a major programme of engagement through seminars, classes, talks, etc. between enterprises and third level institutions that are open to local communities, particularly in deprived/disadvantaged areas, to make enterprises and the public aware of the innovation taking place in these institutions and the benefits to be garnered through partnership, as well as the opportunities for careers and success. | Regional / All LAs | M | HEIs, HEA, DES, Private enterprises, Local residents | Number of attendees, new collaborations and level of community involvement and engagement. |
| 5.2 | 19 | Work with the Irish Local Development Network (ILDN) to investigate opportunities for collaboration with the aim of promoting and facilitating social enterprises and innovation. | Regional / All LAs | M | N/A | Growth in the social enterprise sector. |

# Section 6: Summary and Conclusion

The formulation and delivery of an integrated *‘enterprise strategy’* for the Dublin Region can direct and guide enterprise growth and development to capture the benefits of a joint, integrated approach. These benefits come from the enhanced sharing of best practices in support delivery and programmes, efficiencies in joint and coordinated projects and initiatives, as well as having the potential to support Dublin with a unified voice. The strategy also fully takes into considerations the distinct characteristics of each local authority area.

Global trends and the performance of Ireland’s enterprise base provides the backdrop against which policy for employment and enterprise has been developed. An emerging regional focus has developed to drive action across a range of policy areas, such as the ***Action Plan for Jobs: Dublin 2016-2018***, the ***Dublin Regional Skills Forum*** as well as through the restructuring from the ***Local Government Reform Act 2014***. The evolving enterprise landscape is clearly recognised in policy, identifying the transformative effects of technological change, entrepreneurship and innovation and the need to continually upgrade the skills base to avail of new opportunities. The policy framework guides and assists the strategic direction of future action but is not prescriptive, providing for the flexibility to evolve as future opportunities, technologies and economic conditions change.

Dublin has a strong international enterprise presence with significant importance in a range of valuable enterprise sectors, such as Administration, Professional Services, Tourism and Leisure, Education and Training, Manufacturing and Industry, Transport and Logistics, ICT and Technology and Retail and Wholesale. Dublin is the main international connection to and from Ireland and is the primary logistics and transportation centre in the country. Dublin is a strong tourism destination with an established reputation for its heritage, culture and quality of experience. The region has an excellent educational offer and has developed significant expansion of collaboration between private enterprise and the third level sector. Dublin has a well-educated workforce, with nearly 270,000 people having attained some form of third-level education. There is a strong supporting ecosystem of supports and agencies, including the LEO network at local level, IDA Ireland and EI.

Through the research and consultation, specific *‘growth opportunity areas’* have emerged delivering significant potential for consolidation and expansion in the future, comprising the following, Design and Creative Industries, Food Industry, The Green Economy (CleanTech and Environment), International Financial Services, Pharma/BioPharma, Software and Digital, Tourism and Education and Training.

To derive an agreed enterprise strategy, a structured approach is needed. Initially, a **Vision** **Statement** for the Dublin Regional Enterprise Strategy can set the future aspirations for the region, as follows:

***“… for the creation of a sustainable, globally competitive and innovative destination for enterprise development and living”.***

From this vision a set of distinct *‘enterprise drivers’* can direct the future strategic direction of enterprise actions. These include not only the potential *‘growth opportunity areas’*, but also opportunities where Dublin can enhance its standing, such as those relating to meeting the needs of entrepreneurs and enterprises, education and training, the culture of entrepreneurship, city positioning and quality of life, which formed the basis for enterprise *‘objectives’*, as follows:

1. *The local authorities will collaborate to develop a unified vision and enterprise proposition for the Dublin Region, with an international focus to attract FDI and a highly skilled and talented workforce.*
2. *Working with other bodies, agencies and businesses, the local authorities will act to deliver a high-quality, efficient, responsive and supportive enterprise environment for all businesses in the region.*
3. *The local authorities will work collectively to promote and foster enterprise in the identified ‘growth opportunity areas’, and to entice FDI to Ireland.*
4. *Through collaboration with other agencies, the local authorities will encourage and facilitate targeted educational and training initiatives to meet the current and emerging future needs of enterprise.*
5. *The local authorities in the Region will promote a culture of entrepreneurship and innovation across the wider community through supports, promotion, marketing and branding initiatives.*

These high level objectives are informed by the vision, but address the principles underscoring the opportunities, providing direction to maximise their potential and to redress any shortcomings.

From the identified objectives, focussed ‘*recommendations’* can assist in the establishment of targeted opportunities for Dublin in order to reach the objectives, as well as to *‘close the gaps’* where regional performance has yet to be maximised, and propose interventions that would improve the environment in which enterprise operates.

The key *‘objectives’* and associated *‘recommendations’* enable the formulation of specific target *‘actions’* that will guide and direct the enterprise strategy in the Dublin Region. These actions are the mechanisms through which the recommendations will be secured. A total of 19 actions have been developed. These are strategic in nature, are set within a time-specific framework, i.e. short (0-12 months), medium (12-36 months) or long term (36+ months), reflecting the high level objectives developed within the strategy formulation process, and have an assigned and appropriate prescribed responsible actor(s) (including non-local authority partners/agencies). Each ‘*recommendation’* of the strategy is supported by an action or actions, although not all recommendations have a supporting action at each timescale of short, medium and long-term. The actions are derived at regional level and also at detailed local authority level, where relevant. It is essential that actions are aligned with a measuring and/or monitoring mechanism to determine its progress and/or outcome.

The local authorities carry out a range of functions that are driven by statutory requirements or follow strategies at a national or regional level. The targeted actions in this strategy can deliver additional benefit and direction to improving the enterprise environment in the Region.

The actions address a range of responses to maximise the promotion and development of enterprise, including awareness, education, training, supports, job creation and accessibility to enterprise-related services. The actions involve a range of response types, including coordination activities, process reviews and monitoring, initiatives and projects, and a number of key events. The implementation of these actions is envisaged to add to the local authorities’ response on the ***Action Plan for Jobs: Dublin 2016-2018*** and other initiatives and set a framework for the future strategic direction of enterprise policy for the region in subsequent years.

The overall delivery of this three-year **enterprise strategy for the Region can and will facilitate an integrated and focussed approach to enterprise growth and development** through nurturing the key *‘enterprise sectors’* and fostering the maximisation of the identified *‘growth opportunity areas’*.

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# Appendix 1: Employee and Enterprise Numbers

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Enterprise Sector** | **2008** | **YoY** | **2009** | **YoY** | **2010** | **YoY** | **2011** | **YoY** | **2012** | **YoY** | **2013** | **YoY** | **2014** | **YoY** |
| **Administration** | 64,841 | N/A | 58,164 | -10% | 56,287 | -3% | 56,171 | 0% | 58,569 | 4% | 60,277 | 3% | 62,091 | 3% |
| **Professional Services** | 200,942 | N/A | 182,595 | -9% | 183,268 | 0% | 186,266 | 2% | 191,302 | 3% | 196,891 | 3% | 204,333 | 4% |
| **Tourism and Leisure** | 56,287 | N/A | 54,206 | -4% | 51,485 | -5% | 49,275 | -4% | 51,151 | 4% | 53,904 | 5% | 57,219 | 6% |
| **Education and Training** | 34,266 | N/A | 29,352 | -14% | 33,234 | 13% | 33,196 | 0% | 33,762 | 2% | 34,308 | 2% | 34,986 | 2% |
| **Manufacturing and Industry** | 42,937 | N/A | 40,147 | -6% | 35,519 | -12% | 35,375 | 0% | 34,057 | -4% | 34,351 | 1% | 44,484 | 29% |
| **Transport and Logistics** | 52,952 | N/A | 49,366 | -7% | 47,860 | -3% | 47,063 | -2% | 46,151 | -2% | 45,693 | -1% | 45,773 | 0% |
| **Construction** | 38,887 | N/A | 26,927 | -31% | 19,413 | -28% | 16,702 | -14% | 15,075 | -10% | 16,243 | 8% | 19,727 | 21% |
| **ICT and Technology** | 47,852 | N/A | 44,153 | -8% | 43,770 | -1% | 44,922 | 3% | 46,700 | 4% | 51,180 | 10% | 53,117 | 4% |
| **Retail and Wholesale** | 170,087 | N/A | 156,864 | -8% | 149,015 | -5% | 147,752 | -1% | 147,029 | 0% | 150,290 | 2% | 150,476 | 0% |
| **Total** | 709,051 | N/A | 641,774 | -9% | 619,851 | -3% | 616,722 | -1% | 623,796 | 1% | 643,137 | 3% | 672,206 | 5% |

**Number of employees** by enterprise sector and year-on-year change (Dublin Region).

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Enterprise Sector** | **2008** | **YoY** | **2009** | **YoY** | **2010** | **YoY** | **2011** | **YoY** | **2012** | **YoY** | **2013** | **YoY** | **2014** | **YoY** |
| **Administration** | 107,973 | N/A | 95,221 | -12% | 92,451 | -3% | 93,974 | 2% | 95,932 | 2% | 98,146 | 2% | 104,022 | 6% |
| **Professional Services** | 286,252 | N/A | 256,370 | -10% | 253,973 | -1% | 256,589 | 1% | 263,254 | 3% | 271,875 | 3% | 283,376 | 4% |
| **Tourism and Leisure** | 150,553 | N/A | 141,302 | -6% | 135,560 | -4% | 133,749 | -1% | 138,113 | 3% | 142,804 | 3% | 149,157 | 4% |
| **Education and Training** | 140,240 | N/A | 114,235 | -19% | 139,679 | 22% | 141,050 | 1% | 140,742 | 0% | 142,282 | 1% | 144,428 | 2% |
| **Manufacturing and Industry** | 219,292 | N/A | 210,885 | -4% | 195,330 | -7% | 194,694 | 0% | 191,956 | -1% | 193,770 | 1% | 203,371 | 5% |
| **Transport and Logistics** | 80,535 | N/A | 73,686 | -9% | 70,902 | -4% | 69,978 | -1% | 69,341 | -1% | 69,764 | 1% | 71,208 | 2% |
| **Construction** | 145,740 | N/A | 96,249 | -34% | 69,777 | -28% | 61,197 | -12% | 55,736 | -9% | 58,059 | 4% | 67,194 | 16% |
| **ICT and Technology** | 63,757 | N/A | 56,817 | -11% | 57,615 | 1% | 59,860 | 4% | 64,327 | 7% | 70,731 | 10% | 75,206 | 6% |
| **Retail and Wholesale** | 349,291 | N/A | 320,587 | -8% | 304,601 | -5% | 303,163 | 0% | 302,441 | 0% | 308,134 | 2% | 313,348 | 2% |
| **Total** | 1,543,633 | N/A | 1,365,352 | -9% | 1,319,888 | -3% | 1,314,254 | -1% | 1,321,842 | 1% | 1,355,565 | 3% | 1,411,310 | 5% |

**Number of employees** by enterprise sector and year-on-year change (National).

|  |  |  |  |
| --- | --- | --- | --- |
| **Enterprise Sector** | **2008-2011** | **2011-2014** | **2008-2014** |
| **Administration** | -13% | 11% | -4% |
| **Professional Services** | -7% | 10% | 2% |
| **Tourism and Leisure** | -12% | 16% | 2% |
| **Education and Training** | -3% | 5% | 2% |
| **Manufacturing and Industry** | -18% | 26% | 4% |
| **Transport and Logistics** | -11% | -3% | -14% |
| **Construction** | -57% | 18% | -49% |
| **ICT and Technology** | -6% | 18% | 11% |
| **Retail and Wholesale** | -13% | 2% | -12% |
| **Total** | -13% | 9% | -5% |

Change in the **number of employees** by enterprise sector: peak to trough, trough to 2014 and peak to 2014 (Dublin Region).

|  |  |  |  |
| --- | --- | --- | --- |
| **Enterprise Sector** | **2008-2011** | **2011-2014** | **2008-2014** |
| **Administration** | -13% | 11% | -4% |
| **Professional Services** | -10% | 10% | -1% |
| **Tourism and Leisure** | -11% | 12% | -1% |
| **Education and Training** | 1% | 2% | 3% |
| **Manufacturing and Industry** | -11% | 4% | -7% |
| **Transport and Logistics** | -13% | 2% | -12% |
| **Construction** | -58% | 10% | -54% |
| **ICT and Technology** | -6% | 26% | 18% |
| **Retail and Wholesale** | -13% | 3% | -10% |
| **Total** | -13% | 9% | -5% |

Change in the **number of employees** by enterprise sector: peak to trough, trough to 2014 and peak to 2014 (National).

Appendix 1: Employee and Enterprise Numbers

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Enterprise Sector** | **2008** | **YoY** | **2009** | **YoY** | **2010** | **YoY** | **2011** | **YoY** | **2012** | **YoY** | **2013** | **YoY** | **2014** | **YoY** |
| **Administration** | 4,251 | N/A | 4,575 | 8% | 4,730 | 3% | 4,818 | 2% | 5,178 | 7% | 5,322 | 3% | 5,229 | -2% |
| **Professional Services** | 25,637 | N/A | 28,217 | 10% | 29,571 | 5% | 30,074 | 2% | 31,263 | 4% | 31,687 | 1% | 31,118 | -2% |
| **Tourism and Leisure** | 3,221 | N/A | 3,347 | 4% | 3,404 | 2% | 3,443 | 1% | 3,527 | 2% | 3,630 | 3% | 3,688 | 2% |
| **Education and Training** | 2,656 | N/A | 2,671 | 1% | 2,942 | 10% | 3,088 | 5% | 3,324 | 8% | 3,416 | 3% | 3,594 | 5% |
| **Manufacturing and Industry** | 3,044 | N/A | 3,183 | 5% | 3,043 | -4% | 3,009 | -1% | 3,070 | 2% | 3,091 | 1% | 3,298 | 7% |
| **Transport and Logistics** | 11,244 | N/A | 11,108 | -1% | 11,185 | 1% | 10,979 | -2% | 11,144 | 2% | 11,008 | -1% | 10,642 | -3% |
| **Construction** | 11,622 | N/A | 11,363 | -2% | 10,359 | -9% | 9,958 | -4% | 9,918 | 0% | 9,871 | 0% | 9,885 | 0% |
| **ICT and Technology** | 4,288 | N/A | 4,600 | 7% | 4,826 | 5% | 5,015 | 4% | 5,343 | 7% | 5,560 | 4% | 5,735 | 3% |
| **Retail and Wholesale** | 11,522 | N/A | 11,879 | 3% | 11,926 | 0% | 11,957 | 0% | 12,257 | 3% | 12,150 | -1% | 11,852 | -2% |
| **Total** | 77,485 | N/A | 80,943 | 4% | 81,986 | 1% | 82,341 | 0% | 85,024 | 3% | 85,735 | 1% | 85,041 | -1% |

**Number of enterprises** by enterprise sector and year-on-year change (Dublin Region).

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Enterprise Sector** | 2008 | YoY | 2009 | YoY | 2010 | YoY | 2011 | YoY | 2012 | YoY | 2013 | YoY | 2014 | YoY |
| **Administration** | 14,399 | N/A | 14,883 | 3% | 15,001 | 1% | 14,990 | 0% | 15,548 | 4% | 15,764 | 1% | 15,412 | -2% |
| **Professional Services** | 60,493 | N/A | 64,555 | 7% | 67,465 | 5% | 68,408 | 1% | 71,200 | 4% | 72,056 | 1% | 70,987 | -1% |
| **Tourism and Leisure** | 17,466 | N/A | 17,467 | 0% | 17,552 | 0% | 17,693 | 1% | 17,892 | 1% | 17,913 | 0% | 17,790 | -1% |
| **Education and Training** | 10,268 | N/A | 10,168 | -1% | 11,137 | 10% | 11,553 | 4% | 12,252 | 6% | 12,542 | 2% | 12,986 | 4% |
| **Manufacturing and Industry** | 15,357 | N/A | 16,285 | 6% | 16,050 | -1% | 16,132 | 1% | 16,385 | 2% | 16,540 | 1% | 16,497 | 0% |
| **Transport and Logistics** | 27,743 | N/A | 27,271 | -2% | 27,196 | 0% | 26,370 | -3% | 26,284 | 0% | 25,734 | -2% | 24,595 | -4% |
| **Construction** | 61,905 | N/A | 57,472 | -7% | 52,607 | -8% | 50,256 | -4% | 49,530 | -1% | 48,502 | -2% | 47,349 | -2% |
| **ICT and Technology** | 8,808 | N/A | 9,254 | 5% | 9,791 | 6% | 10,206 | 4% | 10,838 | 6% | 11,222 | 4% | 11,349 | 1% |
| **Retail and Wholesale** | 46,234 | N/A | 46,494 | 1% | 46,820 | 1% | 47,030 | 0% | 47,554 | 1% | 47,061 | -1% | 45,618 | -3% |
| **Total** | 262,673 | N/A | 263,849 | 0% | 263,619 | 0% | 262,638 | 0% | 267,483 | 2% | 267,334 | 0% | 262,583 | -2% |

**Number of enterprises** by enterprise sector and year-on-year change (National).

|  |  |  |  |
| --- | --- | --- | --- |
|  | **2008-2011** | **2011-2014** | **2008-2014** |
| **Administration** | 13% | 9% | 23% |
| **Professional Services** | 17% | 3% | 21% |
| **Tourism and Leisure** | 7% | 7% | 14% |
| **Education and Training** | 16% | 16% | 35% |
| **Manufacturing and Industry** | -1% | 10% | 8% |
| **Transport and Logistics** | -2% | -3% | -5% |
| **Construction** | -14% | -1% | -15% |
| **ICT and Technology** | 17% | 14% | 34% |
| **Retail and Wholesale** | 4% | -1% | 3% |
| **Total** | 6% | 3% | 10% |

Change in the **number of enterprises** by enterprise sector: peak to trough, trough to 2014 and peak to 2014 (Dublin Region).

|  |  |  |  |
| --- | --- | --- | --- |
|  | **2008-2011** | **2011-2014** | **2008-2014** |
| **Administration** | 4% | 3% | 7% |
| **Professional Services** | 13% | 4% | 17% |
| **Tourism and Leisure** | 1% | 1% | 2% |
| **Education and Training** | 13% | 12% | 26% |
| **Manufacturing and Industry** | 5% | 2% | 7% |
| **Transport and Logistics** | -5% | -7% | -11% |
| **Construction** | -19% | -6% | -24% |
| **ICT and Technology** | 16% | 11% | 29% |
| **Retail and Wholesale** | 2% | -3% | -1% |
| **Total** | 0% | 0% | 0% |

Change in the **number of enterprises** by enterprise sector: peak to trough, trough to 2014 and peak to 2014 (National).

Appendix 1: Employee and Enterprise Numbers

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Enterprise Sector** | 2008 | YoY | 2009 | YoY | 2010 | YoY | 2011 | YoY | 2012 | YoY | 2013 | YoY | 2014 | YoY |
| **Administration** | 66,540 | N/A | 59,893 | -10% | 58,057 | -3% | 57,929 | 0% | 60,474 | 4% | 62,129 | 3% | 63,998 | 3% |
| **Professional Services** | 214,098 | N/A | 195,974 | -8% | 197,135 | 1% | 200,258 | 2% | 205,818 | 3% | 211,339 | 3% | 218,858 | 4% |
| **Tourism and Leisure** | 57,846 | N/A | 55,763 | -4% | 53,013 | -5% | 50,786 | -4% | 52,662 | 4% | 55,379 | 5% | 58,670 | 6% |
| **Education and Training** | 35,724 | N/A | 31,282 | -12% | 34,931 | 12% | 35,011 | 0% | 35,786 | 2% | 36,403 | 2% | 37,226 | 2% |
| **Manufacturing and Industry** | 44,026 | N/A | 41,225 | -6% | 36,496 | -11% | 36,348 | 0% | 35,098 | -3% | 35,390 | 1% | 45,549 | 29% |
| **Transport and Logistics** | 63,099 | N/A | 59,310 | -6% | 57,828 | -2% | 56,761 | -2% | 55,972 | -1% | 55,355 | -1% | 55,065 | -1% |
| **Construction** | 46,302 | N/A | 33,303 | -28% | 25,329 | -24% | 22,432 | -11% | 21,022 | -6% | 22,187 | 6% | 25,854 | 17% |
| **ICT and Technology** | 48,831 | N/A | 45,210 | -7% | 44,858 | -1% | 45,998 | 3% | 47,864 | 4% | 52,329 | 9% | 54,278 | 4% |
| **Retail and Wholesale** | 174,298 | N/A | 161,166 | -8% | 153,283 | -5% | 152,053 | -1% | 151,557 | 0% | 154,743 | 2% | 154,786 | 0% |
| **Total** | 750,764 | N/A | 683,126 | -9% | 660,930 | -3% | 657,576 | -1% | 666,253 | 1% | 685,254 | 3% | 714,284 | 4% |

**Number of** **people engaged in work** by enterprise sector and year-on-year change (Dublin Region).

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Enterprise Sector** | 2008 | YoY | 2009 | YoY | 2010 | YoY | 2011 | YoY | 2012 | YoY | 2013 | YoY | 2014 | YoY |
| **Administration** | 116,536 | N/A | 103,884 | -11% | 100,925 | -3% | 102,328 | 1% | 104,559 | 2% | 106,682 | 2% | 112,448 | 5% |
| **Professional Services** | 321,368 | N/A | 291,854 | -9% | 290,777 | 0% | 293,560 | 1% | 301,392 | 3% | 309,705 | 3% | 321,490 | 4% |
| **Tourism and Leisure** | 163,673 | N/A | 154,069 | -6% | 148,189 | -4% | 146,374 | -1% | 150,735 | 3% | 155,105 | 3% | 161,097 | 4% |
| **Education and Training** | 145,451 | N/A | 121,622 | -16% | 145,700 | 20% | 147,369 | 1% | 147,643 | 0% | 149,390 | 1% | 151,939 | 2% |
| **Manufacturing and Industry** | 226,577 | N/A | 218,279 | -4% | 202,301 | -7% | 201,695 | 0% | 199,193 | -1% | 200,991 | 1% | 210,545 | 5% |
| **Transport and Logistics** | 104,730 | N/A | 97,341 | -7% | 94,358 | -3% | 92,582 | -2% | 91,852 | -1% | 91,644 | 0% | 91,985 | 0% |
| **Construction** | 190,069 | N/A | 134,313 | -29% | 104,545 | -22% | 94,640 | -9% | 89,351 | -6% | 91,122 | 2% | 99,860 | 10% |
| **ICT and Technology** | 66,528 | N/A | 59,771 | -10% | 60,635 | 1% | 62,919 | 4% | 67,583 | 7% | 73,936 | 9% | 78,377 | 6% |
| **Retail and Wholesale** | 374,598 | N/A | 345,721 | -8% | 329,380 | -5% | 328,147 | 0% | 327,687 | 0% | 332,768 | 2% | 336,866 | 1% |
| **Total** | 1,709,530 | N/A | 1,526,854 | -11% | 1,476,810 | -3% | 1,469,614 | 0% | 1,479,995 | 1% | 1,511,343 | 2% | 1,564,607 | 4% |

**Number of** **people engaged in work** by enterprise sector and year-on-year change (National).

|  |  |  |  |
| --- | --- | --- | --- |
|  | **2008-2011** | **2011-2014** | **2008-2014** |
| **Administration** | -13% | 10% | -4% |
| **Professional Services** | -6% | 9% | 2% |
| **Tourism and Leisure** | -12% | 16% | 1% |
| **Education and Training** | -2% | 6% | 4% |
| **Manufacturing and Industry** | -17% | 25% | 3% |
| **Transport and Logistics** | -10% | -3% | -13% |
| **Construction** | -52% | 15% | -44% |
| **ICT and Technology** | -6% | 18% | 11% |
| **Retail and Wholesale** | -13% | 2% | -11% |
| **Total** | -12% | 9% | -5% |

Change in the **number of people engaged in work** by enterprise sector: peak to trough, trough to 2014 and peak to 2014 (Dublin Region).

|  |  |  |  |
| --- | --- | --- | --- |
|  | **2008-2011** | **2011-2014** | **2008-2014** |
| **Administration** | -12% | 10% | -4% |
| **Professional Services** | -9% | 10% | 0% |
| **Tourism and Leisure** | -11% | 10% | -2% |
| **Education and Training** | 1% | 3% | 4% |
| **Manufacturing and Industry** | -11% | 4% | -7% |
| **Transport and Logistics** | -12% | -1% | -12% |
| **Construction** | -50% | 6% | -47% |
| **ICT and Technology** | -5% | 25% | 18% |
| **Retail and Wholesale** | -12% | 3% | -10% |
| **Total** | -14% | 6% | -8% |

Change in the **number of people engaged in work** by enterprise sector: peak to trough, trough to 2014 and peak to 2014 (National).

# Appendix 2: Enterprise Locations

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Nace Group** | **Nace Code** | **Tallaght** | **Clondalkin** | **Liffey Valley** | **Ballymount** | **Citywest Newcastle Greenogue** | **Clonshaugh** | **Western Subs** | **Finglas** | **Dublin Business Park** | **Inside Canal** | **IFSC/Docklands** | **D1, D2, D4** | **Eastpoint** | **Cherrywood** | **Dundrum** | **Sandyford/Leopardstown** | **Coastal Dun Laoghaire** | **Balbriggan** | **North Fringe** | **Swords** | **Ballycoolin** | **Damastown** |
| AGRICULTURE, FORESTRY AND FISHING | A | 0% | 0% | 0% | 0% | 1% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 1% | 0% | 0% | 1% | 0% |
| MINING AND QUARRYING | B | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| MANUFACTURING | C | 7% | 8% | 5% | 11% | 12% | 12% | 7% | 9% | 10% | 4% | 2% | 2% | 2% | 13% | 1% | 4% | 1% | 3% | 12% | 4% | 10% | 15% |
| ELECTRICITY, GAS, STEAM AND AIR CONDITIONING SUPPLY | D | 0% | 0% | 0% | 0% | 1% | 0% | 0% | 0% | 1% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 1% | 0% | 0% | 0% |
| WATER SUPPLY AND REMEDIATION | E | 0% | 1% | 0% | 1% | 2% | 0% | 1% | 0% | 1% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 1% | 1% | 0% | 1% | 0% |
| CONSTRUCTION | F | 4% | 3% | 2% | 6% | 5% | 2% | 4% | 4% | 5% | 1% | 2% | 1% | 4% | 0% | 1% | 1% | 1% | 2% | 3% | 2% | 6% | 6% |
| WHOLESALE AND RETAIL TRADE; REPAIR OF VEHICLES | G | 31% | 30% | 41% | 36% | 24% | 27% | 33% | 35% | 29% | 20% | 9% | 20% | 10% | 22% | 30% | 18% | 21% | 24% | 23% | 29% | 24% | 15% |
| TRANSPORTATION AND STORAGE | H | 3% | 3% | 2% | 5% | 7% | 4% | 4% | 8% | 5% | 1% | 2% | 1% | 12% | 0% | 1% | 2% | 2% | 2% | 10% | 9% | 12% | 8% |
| ACCOMMODATION AND FOOD SERVICE ACTIVITIES | I | 9% | 8% | 10% | 3% | 2% | 4% | 6% | 7% | 5% | 12% | 11% | 16% | 4% | 13% | 13% | 6% | 11% | 11% | 4% | 12% | 3% | 3% |
| INFORMATION AND COMMUNICATION | J | 3% | 1% | 1% | 7% | 8% | 4% | 5% | 4% | 4% | 5% | 9% | 5% | 29% | 3% | 4% | 9% | 3% | 2% | 5% | 2% | 8% | 4% |
| FINANCIAL AND INSURANCE ACTIVITIES | K | 2% | 2% | 2% | 3% | 2% | 1% | 2% | 1% | 1% | 2% | 20% | 7% | 8% | 16% | 4% | 12% | 5% | 4% | 4% | 4% | 2% | 2% |
| REAL ESTATE ACTIVITIES | L | 1% | 2% | 0% | 1% | 1% | 1% | 1% | 1% | 1% | 2% | 2% | 3% | 1% | 3% | 4% | 3% | 2% | 2% | 2% | 2% | 2% | 2% |
| PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES | M | 10% | 7% | 4% | 11% | 23% | 7% | 6% | 5% | 10% | 17% | 17% | 17% | 15% | 13% | 9% | 22% | 17% | 5% | 8% | 6% | 10% | 14% |
| ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES | N | 6% | 4% | 2% | 8% | 7% | 6% | 6% | 5% | 6% | 4% | 4% | 4% | 9% | 0% | 1% | 8% | 2% | 3% | 7% | 6% | 8% | 5% |
| PUBLIC ADMINISTRATION, DEFENCE, SOCIAL SECURITY | O | 2% | 1% | 1% | 0% | 0% | 2% | 1% | 1% | 1% | 3% | 1% | 2% | 1% | 3% | 1% | 1% | 1% | 3% | 2% | 2% | 0% | 3% |
| EDUCATION | P | 3% | 3% | 4% | 0% | 1% | 5% | 3% | 3% | 2% | 3% | 3% | 3% | 0% | 3% | 3% | 1% | 4% | 5% | 2% | 2% | 1% | 12% |
| HUMAN HEALTH AND SOCIAL WORK ACTIVITIES | Q | 7% | 10% | 14% | 1% | 3% | 10% | 7% | 6% | 6% | 13% | 7% | 7% | 1% | 6% | 13% | 6% | 14% | 13% | 6% | 8% | 4% | 2% |
| ARTS, ENTERTAINMENT AND RECREATION | R | 3% | 3% | 4% | 1% | 1% | 4% | 3% | 4% | 4% | 4% | 4% | 4% | 2% | 3% | 3% | 4% | 4% | 6% | 4% | 3% | 4% | 7% |
| OTHER SERVICE ACTIVITIES | S | 9% | 13% | 7% | 3% | 2% | 10% | 10% | 8% | 11% | 11% | 6% | 8% | 1% | 3% | 12% | 3% | 11% | 14% | 6% | 8% | 5% | 0% |
| ACTIVITIES OF EXTRA TERRITORIAL ORGANISATIONS AND BODIES | U | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 1% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| **Total** | | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100%  Enterprises in each NACE sector as a proportion of all enterprises in each cluster. | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

**Appendix 2: Enterprise Locations**

Proportional of enterprises by NACE sector distributed across the enterprise cluster.

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Nace Group** | **Nace** | **Tallaght** | **Clondalkin** | **Liffey Valley** | **Ballymount** | **Citywest Newcastle Greenogue** | **Clonshaugh** | **Western Subs** | **Finglas** | **Dublin Business Park** | **Inside Canal** | **IFSC/Docklands** | **D1, D2, D4** | **Eastpoint** | **Cherrywood** | **Dundrum** | **Sandyford/Leopardstown** | **Coastal Dun Laoghaire** | **Balbriggan** | **North Fringe** | **Swords** | **Ballycoolin** | **Damastown** | **Total** |
| AGRICULTURE, FORESTRY AND FISHING | A | 0% | 0% | 0% | 3% | 18% | 3% | 6% | 0% | 3% | 3% | 0% | 6% | 0% | 0% | 0% | 0% | 9% | 6% | 3% | 15% | 21% | 3% | 100% |
| MINING AND QUARRYING | B | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 100% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 100% |
| MANUFACTURING | C | 5% | 2% | 2% | 14% | 7% | 4% | 10% | 3% | 3% | 12% | 2% | 10% | 0% | 0% | 0% | 2% | 2% | 1% | 6% | 3% | 8% | 3% | 100% |
| ELECTRICITY, GAS, STEAM AND AIR CONDITIONING SUPPLY | D | 2% | 0% | 0% | 9% | 9% | 0% | 9% | 4% | 4% | 9% | 4% | 26% | 0% | 0% | 0% | 4% | 0% | 0% | 15% | 0% | 4% | 2% | 100% |
| WATER SUPPLY; SEWERAGE, WASTE MANAGEMENT AND REMEDIATION ACTIVITIES | E | 3% | 5% | 0% | 20% | 11% | 2% | 21% | 0% | 2% | 6% | 3% | 4% | 0% | 0% | 0% | 3% | 0% | 5% | 4% | 3% | 8% | 1% | 100% |
| CONSTRUCTION | F | 5% | 2% | 1% | 15% | 6% | 1% | 10% | 3% | 2% | 10% | 4% | 14% | 1% | 0% | 1% | 1% | 4% | 1% | 4% | 3% | 10% | 2% | 100% |
| WHOLESALE AND RETAIL TRADE; REPAIR OF MOTOR VEHICLES AND MOTORCYCLES | G | 4% | 2% | 3% | 9% | 3% | 2% | 9% | 3% | 2% | 14% | 2% | 23% | 0% | 0% | 3% | 2% | 6% | 1% | 3% | 5% | 4% | 1% | 100% |
| TRANSPORTATION AND STORAGE | H | 4% | 1% | 1% | 9% | 6% | 2% | 7% | 5% | 2% | 6% | 3% | 9% | 1% | 0% | 1% | 2% | 3% | 1% | 9% | 11% | 15% | 2% | 100% |
| ACCOMMODATION AND FOOD SERVICE ACTIVITIES | I | 3% | 1% | 2% | 2% | 1% | 1% | 4% | 1% | 1% | 19% | 5% | 42% | 0% | 0% | 3% | 2% | 7% | 1% | 1% | 4% | 1% | 0% | 100% |
| INFORMATION AND COMMUNICATION | J | 2% | 0% | 0% | 9% | 5% | 1% | 6% | 1% | 1% | 17% | 9% | 27% | 2% | 0% | 2% | 5% | 4% | 0% | 2% | 2% | 6% | 1% | 100% |
| FINANCIAL AND INSURANCE ACTIVITIES | K | 1% | 1% | 1% | 3% | 1% | 0% | 2% | 0% | 0% | 7% | 19% | 38% | 1% | 0% | 2% | 7% | 6% | 1% | 2% | 3% | 2% | 0% | 100% |
| REAL ESTATE ACTIVITIES | L | 2% | 1% | 0% | 4% | 2% | 1% | 2% | 1% | 0% | 13% | 6% | 38% | 0% | 0% | 4% | 5% | 8% | 2% | 2% | 5% | 3% | 1% | 100% |
| PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES | M | 3% | 1% | 1% | 5% | 5% | 1% | 3% | 1% | 1% | 20% | 6% | 33% | 0% | 0% | 1% | 5% | 8% | 1% | 2% | 2% | 3% | 1% | 100% |
| ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES | N | 4% | 1% | 1% | 10% | 4% | 2% | 7% | 2% | 1% | 12% | 4% | 26% | 1% | 0% | 0% | 5% | 3% | 1% | 4% | 5% | 6% | 1% | 100% |
| PUBLIC ADMINISTRATION AND DEFENCE; COMPULSORY SOCIAL SECURITY | O | 4% | 1% | 2% | 1% | 0% | 2% | 5% | 1% | 1% | 28% | 3% | 33% | 0% | 0% | 1% | 2% | 3% | 3% | 3% | 6% | 1% | 2% | 100% |
| EDUCATION | P | 3% | 1% | 2% | 1% | 1% | 3% | 7% | 2% | 1% | 18% | 5% | 32% | 0% | 0% | 2% | 1% | 9% | 2% | 2% | 2% | 2% | 3% | 100% |
| HUMAN HEALTH AND SOCIAL WORK ACTIVITIES | Q | 3% | 2% | 3% | 1% | 1% | 2% | 6% | 1% | 1% | 26% | 4% | 23% | 0% | 0% | 4% | 2% | 11% | 2% | 2% | 4% | 2% | 0% | 100% |
| ARTS, ENTERTAINMENT AND RECREATION | R | 3% | 1% | 2% | 2% | 1% | 2% | 5% | 2% | 1% | 17% | 5% | 30% | 0% | 0% | 2% | 4% | 8% | 2% | 3% | 3% | 4% | 2% | 100% |
| OTHER SERVICE ACTIVITIES | S | 4% | 2% | 2% | 2% | 1% | 2% | 7% | 2% | 2% | 22% | 3% | 27% | 0% | 0% | 3% | 1% | 9% | 2% | 2% | 4% | 2% | 0% | 100% |
| ACTIVITIES OF EXTRA TERRITORIAL ORGANISATIONS AND BODIES | U | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 2% | 4% | 85% | 0% | 0% | 0% | 0% | 9% | 0% | 0% | 0% | 0% | 0% | 100% |

# Appendix 3: Steering Committee

|  |  |  |
| --- | --- | --- |
| **Name** | **Title** | **Organisation** |
| Mr. Frank Nevin | Director of Services – Economic, Enterprise and Tourism Development | South Dublin County Council |
| Mr. Brendan Kenny | Chief Executive | Dublin City Council |
| Ms. Dearbhla Lawson | Director of Services – Economic, Community and Cultural Development | Dún Laoghaire Rathdown County Council |
| Mr. Ed Hearne | Director of Services – Economic, Enterprise and Tourism Development | Fingal County Council |

# Appendix 4: List of Consultees

|  |  |
| --- | --- |
| **Name** | **Organisation** |
| Mr. Jim Conway Mr. Malachy Bradley Dr. Juan Martinez Covarrubias | Midlands and Eastern Regional Assembly |
| Mr. Greg Swift Ms. Mary MacSweeney | Local Enterprise Office, Dublin City Council |
| Mr. Colm Ward | Local Enterprise Office, South Dublin Council |
| Mr. Oisín Geoghegan | Local Enterprise Office, Fingal County Council |
| Ms. Eibhlin Curley | Local Enterprise Office, Dún Laoghaire Rathdown County Council |
| Mr. Derek Walsh Ms. Mary Lyons Ms. John McGrath  Ms. Fiona Hartley | SOLAS |
| Mr. Michael Brougham | Enterprise Ireland |
| Mr. Conor Simpson | IDA Ireland |
| Mr. Aebhric McGinley | Dublin Chamber of Commerce |
| Mr. Tony Lambert Ms. Siobhán Kinsella | Fingal Chamber |
| Ms. Andrea Carroll | South Dublin Chamber |
| Ms. Aileen Eglington | Dún Laoghaire Rathdown Chamber |
| Ms. Liz Carroll | Irish Small and Medium Enterprises Association |
| Mr. Jim Cassidy | Code Institute |
| Ms. Keelin Fagan Mr. Mark Rowlette | Fáilte Ireland |
| Ms. Natasha Kinsella | Dublin Regional Skills Forum |
| Mr. Declan McCulloch | Ireland’s Action Plan for Jobs – Implementation Committee |
| Ms. Eadaoin Collins | Department of Jobs Enterprise and Innovation |
| **Name** | **Organisation** |
| Ms. Caitriona Bracken | Department of Social Protection |
| Mr. Ciaran Casey | Dublin Start Up Commissioner |
| Ms. Helen McGrath | Nova, University College Dublin |
| Ms. Maria Johnston | Invent, Dublin City University |
| Mr. Padraig O’Shea | Trinity Enterprise Centre |
| Ms. Assumpta Harvey | Linc, Institute of Technology Blanchardstown |
| Mr. Tom Flanagan | Dublin Institute of Technology Hothouse |
| Mr. Tom Rooney | Synergy Centre, Institute of Technology Tallaght |
| Mr. Dominic Mullan | Dún Laoghaire Institute of Art, Design and Technology, Media Cube |
| Mr. Eamonn Sayers | Guinness Enterprise Centre |
| Ms. Susan Richardson | St Paul's Area Development Spade Ltd |
| Mr. Paul Murgatroyd | Base Enterprise Centre |
| Mr. John Matthews | Darndale Enterprise Centre |
| Ms. Ria Stubbs | BEAT Centre Balbriggan |
| Mr. John Matthews | Dun Laoghaire Enterprise Centre |
| Ms. Miriam Collins | PARTAS |
| Ms. Michelle Hannon | Terenure Enterprise Centre |
| Ms. Angela Tynan | Nutgrove Enterprise Park |
| Ms. Mary Dimas | Ballymun Whitehall Enterprise Centre |
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1. ***Gross value added (GVA)*** is the measure of the value of goods and services produced in an area, industry or sector of an economy. [↑](#footnote-ref-1)
2. ***Gross Domestic Product (GDP)*** is a monetary value of all goods and services produced within a State’s borders during a specific time period. [↑](#footnote-ref-2)
3. ***‘Born Globals’*** - firms that, from inception, seek to derive advantage from the use of resources and the sale of outputs in multiple countries. [↑](#footnote-ref-3)
4. ***Ireland’s National Skills Strategy 2025*** (2016) identifies Ireland’s current skills profile, provides a strategic vision and specific objectives for Ireland’s future skills requirements, and sets out a road map for how the vision and objectives can be achieved. [↑](#footnote-ref-4)
5. ***The Dublin Regional Skills Forum*** is part of the network of Regional Skills Fora created as part of the National Skills Strategy to provide an opportunity for employers and the education and training system to work together to meet the emerging skills needs of the region. The Forum comprises the major HEIs, City of Dublin Education and Training Board, Dublin Dun Laoghaire Education and Training Board, Skillnet, IDA Ireland, Enterprise Ireland, National Disability Authority, IBEC, Local County Councils, Local Enterprise Offices, ISME and Chamber Dublin. [↑](#footnote-ref-5)
6. The***Local Government Reform Act 2014*** (2014) introduced a wide-ranging series of reforms of the local government system and sets up the Regional Assemblies, Regional Spatial and Economic Strategies and the Local Economic and Community Plan structures. [↑](#footnote-ref-6)
7. The ***Action Plan for Jobs: Dublin 2016-2018*** (2016) requires all Government Departments and Agencies to work together to deliver on agreed action points for each year. At a national level, the Action Plan for Job's Five Strategic Ambitions are to: support 200,000 net additional jobs by 2020; get Ireland back to a top-five ranking in international competitiveness; stimulate the domestic economy and generate employment in locally traded sector; build an indigenous engine of growth that drives up the export market share of Irish companies; build world-class clusters in key sectors of opportunity. Similarly, at a regional level the Action Plan sets out clear actions and targets to help create positive conditions for job creation. [↑](#footnote-ref-7)
8. ***The Local Government Reform Act 2014*** introduced a number of changes to the regional structures in Ireland. Three new Regional Assemblies have come into effect. The four Dublin local authorities are now in the Eastern and Midland Regional Assembly, along with counties Louth, Kildare, Meath, Wicklow, Longford, Laois, Offaly and Westmeath. [↑](#footnote-ref-8)
9. ***Innovation 2020: Excellence, Talent, Impact*** (2015) is Ireland’s five-year strategy on research and development, science and technology. Innovation sets out the roadmap for continuing progress towards the goal of making Ireland a Global Innovation Leader, driving a strong sustainable economy and a better society. [↑](#footnote-ref-9)
10. ***SOLAS*** is an agency of the Department of Education and Skills and is tasked with building the identity and values of a world-class, integrated Further Education and Training sector. [↑](#footnote-ref-10)
11. ***Ireland’s Smart Specialisation Strategy for Research and Innovation - Summary***(2014) is an integrated, place-based economic transformation agenda for Ireland. It identifies Priority Areas for future research investment. [↑](#footnote-ref-11)
12. Davy Economics (2015) “*How important is Dublin to Ireland's recovery*?” [↑](#footnote-ref-12)
13. Central Statistics Office of Ireland (CSO) – Preliminary Census 2016 Results. [↑](#footnote-ref-13)
14. The labour force participation rate is calculated by expressing the labour force (i.e. those at work, looking for first regular job and unemployed) as a percentage of the total aged 15 years and over.  [↑](#footnote-ref-14)
15. In undertaking the detailed enterprise analysis, nine key sectors of enterprise are considered based on NACE codes, a European classification system for economic activities. These sectors are based on the NACE code sectors for which data is made available at county level by the CSO. The NACE codes within the Sectors are as follows: ***‘Administration’*** includes administrative and support service activities; ***‘Professional Services’*** includes financial and insurance activities, real estate activities, professional, scientific and technical activities and information and communication; ***‘Tourism and Leisure’*** includes accommodation and food service activities; ***‘Education and Training’***; ***‘Manufacturing and Industry’*** includes manufacturing, electricity, gas, steam and air conditioning supply, water supply, sewerage, waste management and remediation activities and mining and quarrying; ***‘Transport and Logistics’*** includes transport and storage; ***‘Construction’*** includes only construction; ***‘ICT and Technology’*** includes ICT manufacturing, sales and services, ,; and ***‘Retail and Wholesale’*** which consists of sales, trade and vehicle repair. [↑](#footnote-ref-15)
16. Note: CSO data relating to employment in relation to agriculture, the public sector and defence, healthcare and social work and some areas of recreation is unavailable at Dublin Regional and local authority levels. [↑](#footnote-ref-16)
17. Note: CSO data relating to employment in relation to agriculture, the public sector and defence, healthcare and social work and some areas of recreation is unavailable at Dublin Regional and local authority levels. [↑](#footnote-ref-17)
18. Data provided directly from Techireland.org (2016). [↑](#footnote-ref-18)
19. Lisney Estate Agents ***‘Dublin Office Update Q2 2016’*** (2016). [↑](#footnote-ref-19)
20. Organisation for Economic Co-operation and Development (OECD) (2014) – ***‘Education at a Glance 2014: OECD Indicators’***. [↑](#footnote-ref-20)
21. A *‘Level 6’*/Ordinary Level Bachelor’s Degree or Higher, CSO (2011). [↑](#footnote-ref-21)
22. The GVA of Dublin’s workforce, at €58,211 per person, is the highest in the State, with a national average of €37,186 per person (CSO, 2014). [↑](#footnote-ref-22)
23. A 1.0 FTE job equates to a single full-time job, while 0.5 FTE job equates to a part-time position. In relation to the latter, two part-time jobs equal 1.0 FTE job. [↑](#footnote-ref-23)
24. Department of Jobs, Enterprise and Innovation (2016) ***‘Annual Employment Survey 2015’***. [↑](#footnote-ref-24)
25. SOLAS (2016) **‘*National Skills Bulletin 2016’.*** [↑](#footnote-ref-25)
26. ***Skillnet*** supports and works with businesses in Ireland to address their current and future skills needs. [↑](#footnote-ref-26)
27. European Centre for the Development of Vocational Training (2012) “*Future skills supply and demand in Europe: Forecast 2012”* Accessible: <http://www.cedefop.europa.eu/en/publications-and-resources/publications/5526> [↑](#footnote-ref-27)
28. The Capital Region of Denmark: Centre for Regional Development (2015) ***‘Regional growth and development strategy: Greater Copenhagen’*** [↑](#footnote-ref-28)
29. Forfás (2009), ***Developing the Green Economy in Ireland*, *Report of the High-Level Group on Green Enterprise****.* [↑](#footnote-ref-29)
30. Sustainable Energy Authority of Ireland (SEAI) (2014), ***Ireland’s Sustainable Energy Supply Chain Opportunity***. [↑](#footnote-ref-30)
31. ***International Financial Services Strategy 2020*** (2015) sets out a new vision and strategy for the sector in Ireland, including a suite of specific actions to drive continued growth and job creation. [↑](#footnote-ref-31)
32. Fáilte Ireland (2016) ***‘Tourism Facts 2015’***. [↑](#footnote-ref-32)
33. Fáilte Ireland (2016) ***‘Tourism Facts 2015’***. [↑](#footnote-ref-33)
34. Department of Education and Skills (2015) *Annual Statistics 2014/15.* [↑](#footnote-ref-34)
35. Private HEI sources. [↑](#footnote-ref-35)
36. Department of Education and Skills (2016) ***Irish Educated, Globally Connected: An International Education Strategy for Ireland, 2016-2020*** [↑](#footnote-ref-36)
37. The **United Nations Educational, Scientific and Cultural Organization (UNESCO)** is an agency of the United Nations with its primary purpose to contribute to peace and security by promoting international collaboration through educational, scientific, and cultural reforms. [↑](#footnote-ref-37)
38. As set out in Section 3 above, i.e. Design and Creative Industries, Food, CleanTech and Environment, International Financial Services, Pharma/ BioPharma, Software and Digital, Tourism and Education and Training [↑](#footnote-ref-38)
39. See the full description provided in Section 6. [↑](#footnote-ref-39)