



ASSESSMENT OF THE SANDYFORD BUSINESS DISTRICT

**AN EXAMINATION OF ROLE & ACHIEVEMENTS OF
SANDYFORD BID CLG TRADING AS SANDYFORD BUSINESS DISTRICT
AND ITS FUTURE ROLE**

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GLOSSARY:

BID	Business Improvement District
DLRCC	Dún Laoghaire-Rathdown County Council
MNC	Multinational Corporation
SBD	Sandyford Business District
SBID	Sandyford BID CLG trading as Sandyford Business District
SPC	Strategic Policy Committee
TMT	Telecommunications, Media & Technology

EXECUTIVE SUMMARY

ECONOMIC CONTRIBUTION OF SANDYFORD BUSINESS DISTRICT

- Sandyford Business District consists of four business parks – Central, Sandyford, South County and Stillorgan Business Parks. Over the past two decades, the four constituent parks have been transformed from low-density light industrial lands to a combination of high-density office, commercial, retail and residential developments. It is now a unique ‘Sustainable Mixed-Use District’ where employers, retail and residents co-exist to work, live and spend leisure time.
- Sandyford Business District is an economic powerhouse in the Greater Dublin Area and in a national economic context. It has 1,000 companies, including 13 Fortune 500 companies; 26,000 employees; 5,000 residents; 400,000 square feet of new office space; it generates €21.6 million in commercial rates for Dún Laoghaire-Rathdown County Council; and the gross wage bill generated in the district is estimated at €1 billion.
- The business clusters in the Sandyford Business District include 118 Information and Communication companies; 99 MedTech companies; 63 Fintech companies; 8 Energytech companies; 27 Autotech companies; 17 Education and Childcare facilities; 49 Hospitality companies; and 117 Retail and Leisure companies.
- Sandyford Business District is going from strength to strength. It is making a very strong contribution to the economy of the Greater Dublin Area and to the national economy in terms of economic activity generated, employment, tax revenues, and hosting some of the most innovative and dynamic companies in the world.

ATTRactions OF SANDYFORD BUSINESS DISTRICT – WHY SANDYFORD?

Sandyford Business District is increasingly becoming a location of choice for inward investment by multi-national corporations and indigenous businesses. SBD has many attractions for investors, employers, employees, and residents.

- It has excellent transport connectivity through the M50 and Luas.
- It is located 10 kilometers south of Dublin City, between the mountains and the sea.
- It is located in the middle of an affluent area of high population density.
- It is a very attractive area in which to live, work and enjoy recreational leisure time. Apart from its own residential population, it is within a short commute of desirable homes and facilities.
- Sandyford Business District was designated a SMART district in 2019, which guarantees that businesses who choose to locate within it, will benefit from a network of intelligence, technological infrastructure and a highly educated workforce.
- The population of Dún Laoghaire Rathdown has a very high level of educational attainment relative to the national average. 40.2 per cent of the population has a degree, post-grad qualification or a PhD. This compares to a national average rate of 20.8 per cent. The

availability of a well-educated population is a key driver of investment and employment creation.

- Dún Laoghaire Rathdown is an affluent and prosperous area, with a high quality of life. In 2016, average household median gross income stood at €66,203, which is 46.3 per cent above the national average.
- It is a world class suburban area with Grade A buildings suitable for headquarters and hubs, particularly as the business community adjusts to the post-Covid environment and new way of working.
- There are significant networking opportunities with the significant presence of some of the most dynamic and innovative companies in the world such as Facebook Google, Mastercard, Microsoft and Vodafone as well as a number of significant indigenous companies. The clustering effect is very important.
- Sandyford Business District has been transformed from an Industrial Estate to a Smart Business District and has become a very desirable location for FDI. It has a key role to play in the future of Ireland's FDI offering. It has become a high tech, knowledge-driven commercial cluster. Such clusters are key for driving innovation, for attracting new businesses into an area, and for enabling growth in indigenous SMEs through innovation, and research and development. The current mix of local and foreign businesses is very significant, but the potential is even more significant provided the area continues to develop as it has done under the auspices and guidance of Sandyford BID CLG (SBID) trading as Sandyford Business District.
- The presence of a very proactive and innovative BID that represents the interests of all businesses and other stakeholders.

ACHIEVEMENTS OF SANDYFORD BID CLG TRADING AS SANDYFORD BUSINESS DISTRICT

The Business Improvement District company, Sandyford BID CLG trading as Sandyford Business District, was established in January 2017 to represent the entire business community in the Sandyford Business District. It provides support for existing businesses within SBD and those looking to relocate and invest in the area. It has achieved considerable progress since its inception.

- The four business parks that constitute the Sandyford Business District have been transformed in recent years from a low-density light industrial area to an aspiring world-class mixed-use district, combining high-density and high-quality office accommodation, commercial, retail and residential development. Under the auspices of SBID, its sectoral offering has been transformed from an Industrial Estate to a dynamic high-tech, knowledge-driven commercial cluster that includes retail, professional services, hospitality, motor dealerships, health, research, digital and financial services.

- The area hosts global technology leaders such as Google, Facebook, Mastercard, Microsoft and Vodafone, however the financial services sector is also growing in importance. Financial firms have accounted for 21 per cent of the take-up of office space over the past decade. AIB and Bank of America Merrill Lynch have a significant presence in the area, BNP Paribas recently announced it has leased 40,000 sq.ft. of offices in the newly developed Termini buildings and Mastercard announced in 2020 that it has taken 250,000 sq.ft in One and Two South County to develop its European Technology Hub focused on contactless payments, artificial intelligence, cyber security, and Blockchain technology.
- Sandyford Business District has on average accounted for 33 per cent of all occupier activity in the Dublin suburban office market and 12 per cent of the wider Dublin office market over the past decade. The TMT sector has accounted for 68 per cent of take up of office space over the past decade. The district is now recognized as a significant suburban hub for the TMT sector.
- There is now strong engagement with Dún Laoghaire-Rathdown County Council, and very importantly, there is ongoing significant collaboration with the Council's Management Team and their colleagues which are strategic partners working together on issues that affect stakeholders. These include business development, strategy, training, management capability tools such as LIFT and LEAN, financial literacy, and the identification of issues that need to be addressed to improve the district.
- Sandyford Business District has representation on four Strategic Policy Committees (SPCs) in Dún Laoghaire-Rathdown County Council. These are Transportation and Marine, Planning and Citizen Engagement, Economic Development and Enterprise, and Housing. Membership of these SPCs and this ongoing collaboration provides the District with a strong voice in the Council. In addition to the ten business leaders representing the four business parks on the board, there is a board member nominated by the Chief Executive of the Council and a board member nominated by the County Council Members. These relationships are critical in enabling the Council to fully understand and respond to the ongoing needs of the district.
- Sandyford Business District comprises over 1,000 companies and 26,000 employees in the four business parks which form the district. One of the main objectives of the board is to promote the district to attract investment, both Foreign Direct Investment and indigenous investment. The number and nature of the companies across many different sectors that are now located in the district bears testament to the success that has been achieved. However, the ambition and potential for further growth and development of the district is very strong.
- Between 2017 and 2021 it engaged in a large number and range of activities around business attraction; business promotion; environment, mobility and placemaking; and providing a strong voice for business.

- Since the inception of SBID, some major companies have invested or expanded in the district, such as AIB, Facebook, Google, ICON, Mastercard, Microsoft, the Spirit Motor Group and SSE Airtricity.

FUTURE PROSPECTS FOR SANDYFORD BUSINESS DISTRICT

The vision of SBID is to continue to develop the area as:

- A world class destination in which to reside, work and visit.;
- A vibrant community of businesses and residents which has a unique identity;
- A place where living, working, visiting and spending leisure time is a positive experience.

It steadfastly lobbies on behalf of its constituents and provides a strong voice to champion issues that impact business.

- The council now fully recognises Sandyford Business District as a very important economic driver in the county in relation to quantum of employment and commercial rates. The relationship has continued to improve in a very constructive manner over the past 5 years and this collaboration is of vital importance for the future development of the district.
- In considering the context for the future development of the Sandyford Business District, the Sandyford Urban Framework Plan 2016-2022 and the impending Dún Laoghaire Rathdown County Development Plan 2022-2028 will be key to the future development of the District. Dún Laoghaire-Rathdown County Council and Sandyford BID CLG trading as Sandyford Business District will together be key to achieving their joint vision for the area.
- SBID has played a very constructive and effective role in the development of the area during its first term and is now very well positioned to make an even more significant contribution during the second term from 2022 to 2026. The structure of the organisation is very strong and its interaction with the Council is proving extremely productive.
- Sandyford Business District is ideally positioned and located for a hybrid working model in the post-COVID era. It is increasingly well serviced from an access perspective by road and other transport infrastructure, including the LUAS and the M50 motorway. In addition, a number of link and by-pass roads continue to be developed to meet the increasing demands in the area. Having hub offices in suburban locations where rents are considerably lower than in city centre locations is now seen as an attractive option. The Sandyford Business District has much to offer in that regard and the growth potential is very significant. SBID, working in a collaborative manner with the council, will play a key role in realising this potential.
- Collaboration with the council will be very important going forward and this will include the evolution of a strategy for the district, placemaking, infrastructure requirements, economic and business enablement, soft skills, exploiting the potential for strong activity clusters, and developing a greater export potential for companies in the district.

- Knight Frank has projected that the working population of the district is likely to grow from 26,000 currently to 48,500 by the end of the next Sandyford Urban Framework Plan 2022-2028.
- To accommodate this quantum of growth in the working population it will be essential to deliver significant residential capacity; an increased number of restaurants and social facilities; a stronger and more extensive retail offering; essential public realm spaces; physical and transport infrastructure to make ease of access for customers and employees in the district as good as possible; and improvements in the overall environment in general.
- There is a need for policy objectives in the next County Development Plan to achieve a 'Sustainable Mixed-Use District' where there is a strategic approach to land use and density, which provides flexibility in heights and mixed uses to facilitate employment growth, increased living accommodation and support amenities.

SECTION 1: BACKGROUND TO SANDYFORD BUSINESS DISTRICT

Sandyford Business District consists of four business parks - Sandyford, Stillorgan, Central and South County Business Parks. At the 2016 AGM of the Sandyford Business District Association (SBDA), a campaign was launched to establish a Business Improvement District (BID) in the Sandyford Business District area. A BID is a defined area within which businesses pay a membership contribution called a 'BID Levy', calculated as a percentage of annual commercial rates. The revenue raised is used to fund projects within the BID's boundaries.

This initiative was driven by a belief that businesses in the SBD area needed to come together and work with each other to strengthen what the district has to offer.

The SBDA submitted a proposal in accordance with Section 129C of the Local Government (Business Improvement District) Act 2006 to Dún Laoghaire-Rathdown County Council to establish a BID scheme in the Sandyford Business District Area.

Sandyford BID CLG trading as Sandyford Business District was established in January 2017 to represent the entire business community in the Sandyford Business District. It provides support for existing businesses within SBD and those looking to relocate and invest in the District. The BID company has a term of five years and a plebiscite of members has to be held towards the end of the five-year term to continue its existence and operations. Regardless of the size of the company or the size of the levy payment, every business has an equal vote in the plebiscite.

The company is funded by the business community and works closely and co-operatively with the local authority as well as local residents and other stakeholders. SBID is now one of the main drivers for the future development of Sandyford.

The **Vision** of SBID is to continue to develop the area as:

- A world class destination in which to reside, work and visit.
- A vibrant community of businesses and residents which has a unique identity.
- A place where living, working, visiting and spending leisure time is a positive experience.

The **Mission** of SBID is to attract investment, promote and support business, improve the environment, and deliver value to all ratepayers in Sandyford Business District.

Its key objectives are:

- Business Attraction – one of the main objectives of the board is to promote the district to attract both indigenous investment and Foreign Direct Investment.
- Business Promotion – Sandyford Business District represents the 1,000 companies and 26,000 employees across the four business parks. It seeks to support companies of all sizes and in all sectors.
- Environment, Mobility and Placemaking – A key priority is to create an attractive environment for businesses and residents in the area and to promote 'Placemaking' as a key driver for delivering imaginative, sustainable, and appropriate projects to enhance the area.

- Strong Voice for Business – It lobbies on behalf of the companies, employees and residents in Sandyford Business District.

The BID payment is fully tax deductible, and the formula for calculating the levy is the same for every ratepayer. The formula for calculation is the Rateable Value of the Property multiplied by the current BID Multiplier, which is 0.005.

Table 1 provides a breakdown of the BID Levy payment amounts in 2021. The average payments are relatively low, with 69 per cent of members paying a levy of €500 or less in 2021.

Table 1: BID Levy Payments

2021 BID LEVY	NUMBER OF ACCOUNTS	%
€0-€250	336	44%
€251-€500	190	25%
€501-€1,000	128	17%
€1,001-€5,000	97	12%
€5,001-€10,000	7	1%
>€10,000	8	1%

Source: 'Sandyford Business District Proposal for Renewal of BID Scheme 2022-2026.

Note: There are 1,000 businesses in the Sandyford Business District of which 766 are rate/levy payers with the balance being tenants of these companies

SECTION 2: THE DISTRICT - ECONOMIC AND BUSINESS ACTIVITY IN THE SANDYFORD BUSINESS DISTRICT

It is generally accepted that there are three key factors that are essential for the success of a region. These are:

- The ability of a region to attract foreign, private and public capital.
- The ability of a region to attract skilled employees, entrepreneurs and creative workers, which enables innovation environments within local labour markets.
- The ability to attract knowledge and innovation activity through technology.

Sandyford Business District (SBD) scores very highly on all three criteria, and this is reflected in the level of investment and employment in the area, and its changing nature over the past couple of decades.

Sandyford Business District is now a 'sustainable mixed-use district' and is an integral part of the economy of the Greater Dublin Area, and indeed of the national economy, with considerable employment, and a preponderance of top businesses, both Irish and international.

In summary, Sandyford Business District is conveniently located 10km south of Dublin City Centre in the Dún Laoghaire-Rathdown County area, and is situated between the sea and the mountains. As such, it is an ideal location in which to invest, work, live and socialize.

SMART SANDYFORD

Smart Dublin was launched in 2016 as an initiative of the four local authorities to engage with smart technology providers, researchers and citizens to solve challenges and improve city life. It seeks to position Dublin as a world leader in the development of new urban solutions, using open data. Sandyford Business District is now an integral part of this process.

Sandyford Business District was designated a SMART district in 2019, which guarantees that businesses who choose to locate within it, will benefit from a network of intelligence, technological infrastructure and a highly educated workforce.

BUSINESS AND ECONOMIC PROFILE OF THE SANDYFORD BUSINESS DISTRICT

The four business parks that constitute the Sandyford Business District have been transformed in recent years from a low-density light industrial area to an aspiring world-class mixed-use district, combining high-density and high-quality office accommodation, commercial, retail and residential development.

There are 1,000 businesses in the Sandyford Business District of which 766 are rate/levy payers with the balance being tenants of these companies. The area is increasingly becoming a location of choice for inward investment by multi-national corporations and indigenous companies of every size.

This inward investment is being driven by a combination of factors. These include the convenient location in the Greater Dublin Area, the local talent pool, industry clusters, transport access, university linkages, Smart Sandyford and the variety of activities in the area.

There is a diverse sectoral business presence in the area. It includes Financial Services; MedTech; Pharmaceutical; Technology, Media and Telecommunications (TMT); the Auto Industry; Health; Leisure; and Retail. **Appendix 1** lists 30 of the top companies that operate in the district highlighting the top quality indigenous and international business names that have invested and located in the area.

A recent report from Knight Frankⁱ suggests that the Sandyford Business District has on average accounted for 33 per cent of all occupier activity in the Dublin suburban office market and 12 per cent of the wider Dublin office market over the past decade. It estimates that the TMT sector has accounted for 68 per cent of take up of office space over the past decade. The district is now recognized as a significant suburban hub for the TMT sector.

The area hosts global technology leaders, such as Google, Facebook and Microsoft, with the financial services sector growing in importance. Financial firms have accounted for 21 per cent of the take-up of office space over the past decade. AIB and Bank of America Merrill Lynch have a significant presence in the area, BNP Paribas has recently announced it has leased 40,000 sq.ft. in Termini in addition to Mastercard's announcement in 2020 that it is taking 250,000 sq.ft. in the South County Campus to develop a European Technology Hub focused on contactless payments, artificial intelligence, cyber security, and Blockchain technology.

FDI is an important part of Ireland's economic model. Companies supported by the IDA accounted for 257,000 direct jobs at the end of 2020, with another 205,000 indirect jobs supported. FDI companies have very strong linkages to the local economy and are particularly important for indigenous SMEs.

Ireland has an incredibly successful FDI model, but impending changes to the global corporation tax regime do pose a challenge. These changes could include a minimum corporation tax rate of 15 per cent, and the application of tax based on where the economic activity actually occurs rather than where the balance sheet resides. In this changing environment, Ireland will have to focus strongly on its non-tax attributes as a major source of competitive advantage. The IDA has a strategy to bring in 800 new investments by 2025 and create an extra 50,000 jobs.

The IDAⁱⁱ (12th July 2021) points out that investment decisions are being impacted by a number of key trends. Digitisation has been accelerated by the pandemic and is now a key driver of innovation and productivity across all sectors from manufacturing firms at the forefront of Industry 4.0 to disruptive service providers leveraging data and AI. COVID-19 is 'prompting a reassessment of where people work and the skills that they need', while sustainability is 'presenting growth opportunities for MNCs to drive the transition to a green economy and factoring into wider considerations on operational resilience'. SBD has a lot to offer in this changing environment.

SBD has been transformed from an Industrial Estate to a Smart Business District and has become a very desirable location for FDI. It has a key role to play in the future and its potential looks very

significant. It has become a high-tech, knowledge-driven commercial cluster. Such clusters are key for driving innovation, for attracting new businesses into an area, and for enabling growth in indigenous SMEs through innovation, and research and development.

SBD is ideally located to play an even more important role in driving FDI and in enhancing the innovation and R&D agenda that is so important to Ireland’s future. The current mix of local and foreign businesses is very significant, but the potential is even more significant provided the area continues to develop as it has done under the auspices and guidance of SBID.

The key statistics on the SBD area give a clear indication of the significant economic and financial impact of the four business parks that constitute the business district.

- The 1,000 businesses employ 26,000 employees.
- The gross wages paid are estimated at €1 billion per annum.
- The contribution to the Exchequer in payroll taxes is estimated at €250 million.
- The contribution to the local authority in commercial rates is €21.6 million.

SOCIO-ECONOMIC STATUS OF DÚN LAOGHAIRE RATHDOWN

Dún Laoghaire Rathdown is an affluent and prosperous area, with a high quality of life. In 2016, average household median gross income stood at €66,203, which is 46.3 per cent above the national average.

Population of Dún Laoghaire Rathdown

Dún Laoghaire Rathdown has a population of 218,018. It consists of 6 electoral areas. The Sandyford Business District is in 2 local electoral areas - Stillorgan Business Park is in the Dundrum electoral area; while Central Park, Sandyford Business Park and South County Business Park are in the Glencullen-Sandyford electoral area.

Table 2: Population in Dún Laoghaire Rathdown Local Electoral Areas

(2016)	POPULATION
Dún Laoghaire Rathdown	218,018
Blackrock	33,727
Dún Laoghaire	41,627
Dundrum	37,452
Glencullen-Sandyford	36,622
Killiney-Shankill	38,082
Stillorgan	30,508

Source: Dún Laoghaire-Rathdown County Council Economic & Community Monitor

Educational Profile

The level of educational attainment in the population of Dún Laoghaire Rathdown is very high relative to the national average. 40.2 per cent of the population has a degree, post-grad

qualification or a PhD. This compares to a national average rate of 20.8 per cent. The availability of a well-educated population is a key driver of investment and employment creation.

Table 3: Level of Educational Attainment

	NO FORMAL	LOWER SECONDARY	HIGHER SECONDARY	TECH/APP/CERT	NON-DEGREE	DEGREE/POST-GRAD/PHD
State	12.5	14.5	18.5	14.7	12.6	20.8
DLR	6.4	8.3	16.4	10.1	14.6	40.2
Blackrock	3.7	5.3	14.9	7.1	14.9	49.9
Dún Laoghaire	7.5	8.7	16.4	10.2	14.3	37.6
Dundrum	8.0	9.7	15.9	10.6	13.1	39.3
Glencullen-Sandyford	4.9	7.6	15.7	11.4	15.8	40.3
Killiney-Shankill	9.6	12.0	18.7	12.5	14.1	29.0
Stillorgan	2.8	5.2	16.9	8.0	15.7	48.8

Source: Dún Laoghaire-Rathdown County Council Economic & Community Monitor

Housing

Dún Laoghaire Rathdown has a high level of owner-occupier housing tenure. Housing tenure in the area has an owner-occupier rate of 69.1 per cent, compared to a national average of 67.6 per cent. The private rental market is also a significant element of housing tenure, with private rental accounting for 20.2 per cent of housing tenure, compared to a national average of 18.2 per cent. The private rental market is particularly important in the Glencullen-Sandyford electoral area.

Table 4: Housing Tenure (Owner-Occupier & Private Rental)

AREA	Owner-Occupier (%)	Rental Private Landlord (%)
State	67.6	18.2
Dún Laoghaire Rathdown	69.1	20.2
Dundrum	74.2	17.6
Blackrock	69.2	23.1
Dún Laoghaire	67.3	19.4
Glencullen-Sandyford	60.3	27.4
Killiney Shankill	71.2	14.9
Stillorgan	72.9	20.2

Source: Dún Laoghaire Rathdown County Council Economic & Community Monitor

Sandyford Business District

The most up to date Census Data relates to 2016. This is the first census for which data on the 'daytime population' of areas was published. The daytime population includes everybody who indicated they worked or studied in the area, along with persons in that area who do not work or study (and so are there during the day).

A breakdown of the data shows the following:

- In 2016 the district had a daytime working population of 21,000 people. This is estimated to have increased to 26,000 by 2021.
- In 2016 4,628 people lived in the district. The age profile of this population is very young, with 47 per cent of the population aged between 20 and 34 years. It is estimated that in 2021, approximately 5,000 people live in the district.
- There is a higher proportion of professional workers in the district than for the wider Dublin region.
- The district has a higher proportion of workers from outside of Ireland, than for the wider Dublin region.

The socio-economic profile of the district reflects the nature of business activities located in the area, particularly in health and TMT.

Sandyford Business District is located in the middle of an affluent area of high population density. It is a very attractive area in which to live, work and enjoy recreational leisure time. Apart from its own residential population, it is within a short commute of desirable homes and facilities. In addition, it is situated between the mountains and the sea.

SECTION 3: THE COMPANY - ACHIEVEMENTS OF SANDYFORD BID CLG TRADING AS SANDYFORD BUSINESS DISTRICT

Sandyford BID CLG (SBID) trading as Sandyford Business District commenced operations on 1st January 2017. Six task forces were set up to respond to the needs of members at the beginning of the process.

1. **Business Attraction:** a critical success factor is the ability to attract both FDI and indigenous companies to the area. The objective of this taskforce is to connect with key influencers including IDA, Enterprise Ireland and the property sector to promote job creation, office developments/investment opportunities and establish Sandyford Business District as a highly attractive location for businesses promoting the location nationally and internationally.
2. **Cost Savings & Benefits:** this taskforce aims to ensure cost savings and available grants are made fully accessible to all businesses in the district. In addition, the taskforce promotes the *#ThinkSandyfordFirst* initiative to bring an additional €10 million to the district. The logic driving this initiative is that if each one of the 1,000 businesses repatriated €10,000 expenditure per annum back to local companies, it would add €10 million to the local economy.
3. **Infrastructure:** this taskforce continuously works in partnership with Dún Laoghaire-Rathdown County Council for improvements in the infrastructure of the district and to increase public realm facilities and public transport services within the area. This includes issues such as wayfinding signage, landscaping, cycling amenities and road access.
4. **Marketing, Communications & Events:** this taskforce supports the board and other task forces in the mission to promote the district as a world class business destination for investment. It organizes events, provides regular updates on activities, it created and maintains a website www.sandyford.ie which includes a directory exclusive to businesses within the district.
5. **Smart Technology & Innovation:** this taskforce has the objective of creating a world class business destination that attracts investment and jobs growth, is sustainable, dynamic and resourceful. It seeks to create a district which encourages smart and innovative thinking and to ensure the district is a destination of choice in which to live, work and visit.
6. **Well-Being & 'Fitz-Biz':** this taskforce focuses on the wellbeing; health, fitness and leisure opportunities for employees and residents to encourage SBD to become the 'Fittest Business District' in Ireland.

OVERVIEW OF ROLE PLAYED BY SANDYFORD BID CLG TRADING AS SANDYFORD BUSINESS DISTRICT FROM 2017 TO 2021

Over the past couple of decades, the four business parks that now constitute the Sandyford Business District have been transformed from a low-density light industrial area to an aspiring world-class mixed-use district, combining high-density and high-quality office accommodation, commercial, retail and residential development. There is still a journey to travel, however the potential for further growth and development looks to be very significant.

Since its inception in 2017, SBID has been a significant driver of the ongoing transition. Prior to the formation of the company the area consisted of four very separate business parks, each doing their own thing with insufficient interaction with Dún Laoghaire-Rathdown County Council.

This situation has changed dramatically since 2017. Under the auspices of SBID, the four business parks now have a strong unity of purpose with clear aims and a shared common agenda. The role of SBID has been instrumental to the progress that has been achieved in recent years. This is down to the governance structure, the quality and motivation of the people involved, and the strong collaboration with the local council.

SBID has a strong voluntary board of directors and a solid governance structure. There is a strong emphasis on communications, both at a general and a segmented level. This is very important in terms of creating unity of purpose and ensuring that all stakeholders are involved in the activities of SBID.

A structured database has been developed, which has enabled effective segmented and much better targeted communications and overall activities. The offering of the BID is becoming more tailored to the needs of different groups, and as a consequence it is becoming much more effective at delivering for the different stakeholders.

There is now strong engagement with Dún Laoghaire-Rathdown County Council, and very importantly, there is ongoing significant collaboration with the management team within the Council. SBID and the council are strategic partners who work together on issues that affect stakeholders. These include business development, strategy, training, management capability tools such as LIFT and LEAN, financial literacy, and the identification of issues that need to be addressed to improve the district.

Sandyford Business District has representation on four Strategic Policy Committees (SPCs) in Dún Laoghaire-Rathdown County Council. These are:

- Transportation and Marine.
- Planning and Citizen Engagement.
- Economic Development and Enterprise.
- Housing.

Membership of these SPCs and the ongoing collaboration with the Council combined with its representation on the board, gives the district a strong voice in considerations of matters relating to the area. These relationships are critical in enabling the Council to fully understand and respond to those needs.

The Council fully recognises Sandyford Business District as a very important economic driver in the county in terms of employment and commercial rates. The effective partnership between the Council and SBID has delivered very tangible results that are mutually beneficial.

A decade ago, the area had a very bad reputation for traffic congestion, however this situation is improving all the time as the physical infrastructure continues to be upgraded. The progress being made on development of the infrastructure is instrumental to the growing success of the district.

The improvements include the LUAS light rail line, the M50 motorway, and a number of link and by-pass roads that are being gradually developed.

The success of SBID can be gauged by the various events that have are organized; the track record in attracting top quality businesses to the district; the cross-company events that are being increasingly organised; and the improvements that are being made to the physical infrastructure and the physical environment.

Sandyford Business District comprises over 1,000 companies and 26,000 employees in the four business parks which form the district. One of the main objectives of the board is to promote the district to attract investment, both Foreign Direct Investment and indigenous investment. The number and nature of the companies across many different sectors that are now located in the district bears testament to the success that has been achieved. However, the ambition and potential for further growth and development of the district is very strong.

Since the inception of SBID, some major companies have invested or expanded in the district, such as AIB, Facebook, Google, Icon, Mastercard, Microsoft, Mastercard, the Spirit Motor Group and SSE Airtricity.

Between 2017 and 2021 it engaged in a large number and range of activities around business attraction; business promotion; environment, mobility and placemaking; and providing a strong voice for business.

Appendix 2 provides a detailed breakdown of all activities per year since 2017.

SECTION 4: THE FUTURE POTENTIAL OF SANDYFORD BUSINESS DISTRICT 2022-2026

The Sandyford Business District is one of the Dublin City Region's foremost employment centres with a number of clusters in key economic sectors and a high proportion of national and European corporate headquarters together with a high-profile cluster of R & D and innovation activity. This is ratified in the Dublin City Region Economic Development Plan with Sandyford, together with UCD and TCD, identified as the key components of the region's Southern Economic Corridor. The district is now one of the critical smart economy locations in Ireland. The Economic Development Plan states that 'Sandyford is the high-tech knowledge-driven commercial cluster for the South City Region'

In considering the context for the future development of the Sandyford Business District, the Sandyford Urban Framework Plan 2016-2022 and the impending Dún Laoghaire Rathdown County Development Plan 2022-2028 will be key to the future development of the District. Dún Laoghaire-Rathdown County council and Sandyford BID CLG trading as Sandyford Business District will together be key to achieving their joint vision for the area.

The vision is to create:

- A world class destination in which to work, reside and visit.
- A vibrant community of businesses and residents which has a unique identity.
- A place where living, working, visiting and spending leisure time is a positive experience.

Strategic development

While well-positioned to take advantage of the expected economic and social trends, some interventions supported by central and local government would be of great value to the strategic future development of Sandyford. A key pillar of this would be the construction of more residential housing in the area to capitalise on Sandyford Business District's potential to be a focal point in the planned adoption of the *15-Minute City*. Both the District's existing facilities as well as projections for the doubling of its working population from 25,000 to 50,000 make it an ideal hub but a further complement of residential housing provision is key to making the vision a reality.

Sandyford Business District has worked with partners in local government to adapt the area to ensure its sustainability, in a broad sense. As the area emerges from the pandemic, it is crucial that it is *fit-for-purpose* in a way that delivers on the requirements of the residents and their families, the working population, and indeed, the business base which is consistently challenged to attract the best global talent. Failing to make proper provision for homes with associated facilities and amenities for the expected increase in the working population in the years ahead would be sub optimal, especially in an area that boasts of a number Fortune 500 companies.

Remote working

Sandyford Business District is well-placed to capitalise on the defined remote working trends evident over the past eighteen months which are expected to remain with the rapid acceleration in the adoption of hybrid working models by businesses as the Covid-19 pandemic subsides. With the ready availability of easily accessible office space at competitive rental prices, when compared to Dublin city centre, this will be financially attractive to businesses.

Moreover, the District's geographical location coupled with excellent transport links serves as a key advantage. Located close to the outskirts of Dublin and serviced by an exit off the M50 arterial route, Sandyford Business District is well-placed to cater for commuters travelling to offices in the area by car from their residential base within and outside of Dublin, particularly from southern hinterland counties such as Wicklow and Wexford.

Complementary of the existing road infrastructure, there are excellent bus and Luas connections serving the urban hinterlands of County Dublin. Access to the DART further enhances the area as a location of choice which is further augmented by the coach terminus that services Dublin Airport, which indicates the area readily caters for local workers and those international executives visiting for business meetings.

Combined, the unparalleled transport infrastructure and office availability means that Sandyford Business District has the potential to grow which a recent industry report highlighted. In that context the area can help alleviate issues with traffic congestion in the city of Dublin as well as the Greater Dublin Area. The area is well placed to seize the **15-Minute City** concept that policymakers are advocating for in a post-pandemic environment focused on sustainable, connected cities and hinterlands.

SANDYFORD URBAN FRAMEWORK PLAN

In 2007, Elected Representatives, local residents and An Bord Pleanála raised serious concerns that the County Development Plan 2004-2010, lacked specific guidance on the future form and necessary infrastructure to support the Sandyford Business District Area. Consequently, a decision was made that the Council would prepare a detailed analysis of the existing situation in the Sandyford Business District outlining the scale and mix of development permitted to date and the potential for infrastructure capacities to provide for future growth without compromising planned growth in other parts of the County.

The Sandyford Urban Framework Plan (SUIFP) is based on that detailed analysis and the existing landscape of the area. The plan is intended to drive on the development of Sandyford Business District in a manner will deliver a place that attracts investment and employment and provides an environment that caters for residential, employment and commercial communities. The Plan has been incorporated within the County Development Plans for 2010-2016 and 2016-2022 and will be incorporated within the next County Development Plan for 2022-2028.

The purpose of the Sandyford Urban Framework Plan was to set out the policies and objectives that, when implemented, would transform Sandyford Business District from a collection of disparate, poorly connected estates to a coordinated and cohesive business district. The intention is

that the future of Sandyford Business District will be plan led.ⁱⁱⁱ This is now happening, and the Sandyford Business District organisation is playing an important and active role.

The rationale for future growth is based on Sandyford Business District continuing to be of strategic importance as an employment area. The Plan builds on:

- Investment in the area over the past 10-15 years.
- Improvements in access by public transport.
- The growth of adjoining residential areas, in particular, Stepside.
- The provision of retail and services to cater for the employment and resident population.
- The growth of high intensity employment.
- The diversity of employment that has located in the district.
- The introduction of residential development that brings vibrancy to the area.

The rationale underpinning the Sandyford Urban Framework Plan 2016-2022 is laid out clearly by the council.

- To promote and facilitate employment growth in Sandyford Business District, in recognition of its status as a primary growth centre in the Economic Development Strategy of the Regional Planning Guidelines 2010-2022.
- To strengthen and enhance the structure and character of the urban form through appropriate sustainable land use zoning and guidance on typology, massing, scale, height, density of the built form and by promoting excellence in design of buildings and the spaces between them.
- To protect the residential amenity of adjoining areas and ensure that development in Sandyford Business District provides for its own infrastructural requirements.
- To encourage a diverse range of uses including employment-based uses, retail and retail services, civic, cultural, leisure, health, educational and other services appropriate in scale commensurate with the role of Sandyford Business District as a 'Place' to work and live.
- To encourage a range of high-quality new homes to promote choice and achieve a social mix.
- To create an environment, supported by key infrastructure and services, that will attract business investment and provide for a range of employment opportunities.
- To create a hierarchy of public open spaces within Sandyford Business District providing high quality amenities and a variety of functions to serve both the resident and employee populations.
- To provide a network of 'green' routes and integrated streets linking the public open spaces, creating a legible and attractive environment for pedestrians and cyclists linking origins with destinations.
- To maximise the contribution of sustainable travel modes in meeting travel demand in accordance with Smarter Travel and to make a number of road improvements to cater for residual demand.

DÚN LAOGHAIRE RATHDOWN COUNTY DEVELOPMENT PLAN 2022-2028

The Dún-Laoghaire Rathdown County Development Plan 2022-2028 is being finalised at the moment. Sandyford Business District made a 60-page submission to the plan to the Pre-Draft plan

in February 2020 and a further 16-page submission to the Draft Plan in April 2021. The key recommendations include:

- Improve accessibility and movement within the district
- Increase the quantum and quality of support services for those working and living in the district.
- Facilitate and encourage a substantial increase in the amount of office floor space in SBD in buildings of high quality.
- Provide for a significant increase in residential numbers living within SBD.
- Introduce high quality cycleways and pedestrian footpaths in SBD.
- Rationalise the present zoning and height limits of the central core area (Sustainable residential neighbourhood 'A' - Zone 5).
- Develop landscaped open green spaces.
- Provision to be made for additional support services for the increased residential population by creating a community 'hub'.

SBID is urging the Council to: *'commit to carrying out an up to-date study which will determine the planning framework required within the SUIFP to deliver Sandyford's vision of a Mixed-Use District with a focus on sustainable neighbourhood zones which support a commercially viable district where people can work, live, visit and socialise in a 15 Minute City location.'*

THE ROLE SANDYFORD BUSINESS DISTRICT WILL PLAY IN 2022 TO 2026

Sandyford Business District has played a very constructive and effective role in the development of the area during its first term and is now very well positioned to make an even more significant contribution during its second period from 2022 to 2026. The structure of the organisation is very strong and effective and its interaction with the council is increasingly productive.

Sandyford Business District is a significant driver of transition in the Greater Dublin Area, and indeed at a national level. It will play a very important role in the transitioning to a post-Covid economy. The area is ideally positioned and located for the hybrid working model that is likely to be a feature of the Irish economy.

It is increasingly well serviced from an access perspective by road and other transport infrastructure, including the LUAS, and the M50 motorway. In addition, a number of link and by-pass roads continue to be developed to meet the increasing demands in the area. The COVID-19 experience has changed the perspective of many businesses and employees. Having hub offices in suburban locations where rents are considerably lower than in city centre locations will be seen as an attractive option. The Sandyford Business District has much to offer in that regard, and the growth potential is very significant. SBID, working in a collaborative manner with the council, will play a key role in realising this potential.

In 2017, a UCD research report^{iv} sought to identify the key issues that require collaborative action in the development of the Sandyford Business District. The key challenges identified were:

- The need to enhance and maintain the competitive advantages of SBD in the Dublin Region and Ireland.
- The need to communicate the concept of SBD internally and externally to position the district in a competitive global business location market.
- Lack of sense of community that drives stakeholders' affiliation with the area.

The UCD report identified that the key driver for turning SBD into a successful business destination is leadership. In particular, the identified challenges present opportunities for business leaders to perform prominent vocal and visible roles. This research was fundamental in encouraging the original proponents to create a BID company in Sandyford Business District.

These challenges have been addressed and the progress has been very strong. Collaboration with the Council has been very important and influential since 2017, it has become more deeply ingrained.

Dún Laoghaire-Rathdown County Council has provided a list of baseline services that it will commit to as part of the process to renew SBID for a second term. These include:

- Public Realm.
- Maintenance of public spaces Street and pavement sweeping.
- Road maintenance.
- Public lighting.
- Road signage.
- Foul drainage.
- Surface water.
- Litter bins.
- Removal of graffiti and chewing gum.
- Bring Centres.

The council has also given commitments to work with Sandyford Business District on an economic development agenda. Initiatives here include:

- Lean business training.
- Mentoring programmes in financial literacy.
- LIFT Ireland (SBD is the first district to partner with LIFT Ireland)

Collaboration with the Council will be very important going forward and will include the evolution of a strategy for the District, placemaking, infrastructure requirements, economic and business enablement, soft skills, exploiting the potential for strong activity clusters, and developing a greater export potential for companies in the district.

Sandyford Business District and Dún Laoghaire-Rathdown County Council have undertaken an extensive Placemaking and Mobility Programme with consultants from the USA and Europe to develop projects for the District in the short, medium and long term. The vision for the Placemaking and Mobility Programme will set out actions as to how publicly-owned and privately-owned spaces can be significantly enhanced and activated with the aim of increasing the attraction of Sandyford Business District as a place to live, work and visit; and to set out actions in relation to how mobility

options in the district can be expanded to increase ease of movement for cyclists and pedestrians, while also easing congestion in and out of the district.

Knight Frank has projected that the working population of the district is likely to grow from 26,000 currently to 48,500 by the end of the next Sandyford Urban Framework Plan 2022-2028.

To accommodate this quantum of growth in the working population it will be essential to deliver significant residential capacity; an increased number of restaurants and social facilities; a stronger and more extensive retail offering; public realm spaces; physical and transport infrastructure to make ease of access for customers and employees in the district as good as possible; and improvements in the overall environment.

Sandyford Business District will face intense competition from Cherrywood over the coming years. Consequently, if the ambition to continue to develop the area as a world class destination in which to work, reside and visit; a vibrant community of businesses and residents which has a unique identity; and a place where living, working, visiting and spending time is a positive experience is to be realised, stakeholders will have to work very hard and continue on the path that was started during the first BID term and which was really making very significant progress in the second half of that term. The development of Cherrywood should actually be seen as a potential positive for SBD. There is a LUAS link between the two areas that could provide greater business networking opportunities combined with residential and recreational opportunities.

The working population of SBD is expected to increase significantly over the coming years. This working population growth is a very strong reason why there is a requirement for policy objectives in the next County Development Plan to achieve a 'Sustainable Mixed-Use District' where there is a strategic approach to land use and density, which provides flexibility in heights and mixed uses to facilitate employment growth, increased living accommodation and support amenities.

**APPENDIX 1:
30 OF THE TOP COMPANIES IN SANDYFORD BUSINESS DISTRICT**

COMPANY	LOCATION
Accenture	South County Business Park
Allied Irish Bank Ltd	Central Park
Ardagh Group	South County Business Park
Audi Centre Ltd	Sandyford Business Park
Bank of America Merrill Lynch Ltd	Central Park
Beacon Hospital	Sandyford Business Park
Brennan & Company Group	Stillorgan Business Park
Covalen	Sandyford Business Park
Cubic Telecom	Sandyford Business Park
Dalata Hotel Group	Sandyford Business Park
D & B Business Information Solutions Ltd	Sandyford Business Park
DCC Plc	South County Business Park
Dunnes Stores Limited	Sandyford Business Park
Facebook Ireland Ltd	Sandyford Business Park
Google Ireland Limited	Sandyford Business Park
ICON plc	South County Business Park
Leaseplan	Central Park
Mastercard	South County Business Park
Leopardstown Racecourse	South County Business Park
Merck Sharp & Dohme Ireland	South County Business Park
Microsoft Ireland Operations Ltd	South County Business Park
Nord Anglia (Ireland) Limited	South County Business Park
Service Source International, Inc.	Sandyford Business Park
Salesforce	Central Park
Spirit Motor Group	Sandyford & Stillorgan Business Parks
SSE Renewable Holdings	South County Business Park
Tullow Oil	Central Park
Ulster Bank Ltd	Central Park
Verizon Connect Ltd	Sandyford Business Park
Vodafone Ireland Ltd	Central Park

APPENDIX 2: ACTIVITIES PER YEAR SINCE 2017

ACTIVITIES IN 2017

In 2017, its first year of operation, the organisation hosted 14 events spanning the six taskforces. These included:

- Inaugural taskforce workshop.
- The official launch of Sandyford BID CLG.
- Launch of website www.sandyford.ie.
- Cost Savings & Benefit Seminar where business owners received valuable advice on effective cost savings initiatives across utility services, environmental changes and grant supports for small business.
- Smart Cities Summit where speakers from around the globe shared ideas on place making and creating SMART cities.
- Retailers Forum demonstrating the power of social media and store layout for retailers.
- An Innovation Forum which looked at the future of work and provided insights into changing work environments, fintech, artificial intelligence, and offices of the future.
- Twilight 5K Team Challenge & FitBiz Week
- Sandyford Business District Awards Night.
- Winter Festival including Santa visit to District.
- Task Forces end of year meet-up.

Apart from these events, the key achievements in 2017 included:

The Business Attraction Taskforce commissioned a study by four MBA Graduates in the Smurfit Graduate Business School looking at the 'Value Proposition to Business Attractiveness'. This report provided a five-year strategic plan with implementable recommendations. The taskforce also investigated the creation of a co-working space for companies seeking to rent office space on flexible terms with collaboration/innovation opportunities.

The Cost Savings & Benefits Taskforce held a Cost Savings breakfast seminar and it promoted the 'Me2You' gift card to the hospitality, leisure and retail sectors in the district.

The Infrastructure Taskforce commissioned a company specializing in wayfinding signage to provide recommendations for a new signage scheme for the district. It worked closely with Dún Laoghaire-Rathdown County Council and also independently funded landscaping and maintenance works in Stillorgan and Sandyford Business Parks to supplement the Service Level Agreement in place with the Council. Works included hard-edging of grass verges, cutting back overhanging branches, removal of large number of suckers at tree bases, litter picks, and weeding. The taskforce also collaborated with the Council to launch a new bike scheme and extra bike racks.

The Marketing & Communications Taskforce created and launched the website www.sandyford.ie and facilitated fourteen events.

ACTIVITIES IN 2018

The **Smart Sandyford Innovation Taskforce** held six 'Morning Meet Ups' and five lunchtime briefings during 2018. The following topics were covered:

- How AI will affect your business.
- Digital Transformation – What does it mean for my business?
- Strategies for Successful Innovation at a time of exponential change.
- Digital Leadership – How to stay ahead in the 21st Century.
- Building to Scale – breaking through barriers to growth.
- Brexit – Make or break for Irish Business in 2019.
- How to promote your business online.
- How to get more business from the Web.
- Marketing Strategies that work for small businesses.
- How to build your brand to increase sales.
- Supports available to grow your business.

In addition to those events, the following events were also organized:

- Breakfast briefing 'Remote working the new world of work and the practical challenges of GDPR'.
- '€10 million Networking Breakfast'.
- Summer BBQ.
- Wellness Week.
- Sandyford Innovation Forum.
- Meet the Ministers.
- Winter Festival.

SBID worked with the Council to deliver the Herbaceous Borders project; a number of landscaping projects; the re-instatement of footpaths and the announcement of the creation of a Pocket Park on Bracken Road.

Sandyford Business District won the Bank of Ireland Enterprise Town Award for a town with a population of 3,000-7,000. This award is a recognition of the collaboration between businesses, residents and stakeholders working together for the continuing development of the district. A prize of €3,000 was awarded to spend on landscape projects in the district.

ACTIVITIES IN 2019

Events held during 2019 included:

- The Innovation Forum with the theme of 'Recruitment & Retention – The Battle for Talent'.
- Breakfast seminar 'Understanding Diversity and Inclusion in the Workplace'. The LIFT programme was officially launched at this event.
- Lunch titled 'Educators meet Employers', addressing how Sandyford Business District can facilitate engagement between third level institutions and potential employers.
- Property Seminar bringing together key stakeholders from the real estate industry, the IDA, Enterprise Ireland, DLRCC and Sandyford Business District to highlight the potential offered by the District.
- HR Sector event that brought together key individuals from the human resources and recruitment sectors.
- Launch of Dublin Economic Monitor.
- Summer BBQ.
- Spirit Sandyford 5K.
- Santa's Arrival in the District.
- Wellness Week addressing issues such as mindfulness, transformation and wellbeing.

Other activities included:

- The project to install new road signage in all areas of the district was completed in 2019 by the Infrastructure Task Force in collaboration with the Council. The signage comprised 85 road signs, 7 new district banners and the updating of 3 large welcome signs. The signage was produced and installed by a company in the district, Gaelite Signs.
- Submissions were made on the Stillorgan Reservoir, Dublin Climate Change Action Plan, Cycle Facility Review, Metrolink, Buss Connects, and a submission to the County Development Plan 2022-2038 titled 'Strategic Study and Action Plan'.
- Significant landscaping and maintenance projects were undertaken, including the installation of planters, litter picking, road sweeping, and edging work along grass verges.
- Smart Sandyford was nominated and shortlisted in the Chambers Ireland Excellence in Local Government Awards by the Council under the 'Promoting Economic Development' category.
- The first of a series of Monna Smart benches was installed by the Council on Carmanhall Road with features that include charging points for electric bicycles and mobile phones, an air compressor, a bike stand and tools, and sensors to collect data on temperature, humidity, and energy consumption.

During 2019, there was a number of significant highlights. Facebook, Google and AIB located operations in the district; and One South County and the Hive were completed.

ACTIVITIES IN 2020

The COVID-19 pandemic caused significant disruption during 2020. Due to COVID-19 restrictions, live physical events were not possible however 15 webinars and 6 podcasts were delivered.

The webinar series covered the following topics:

- 'Financing Your Business Through Covid-19 Challenges'.
- 'How Employers Should Respond During the Covid-19 Crisis'.
- 'Working Remotely, Top Tips on Staying Motivated and Getting the Most from Your Day'.
- 'Managing Your Physical & Mental Wellbeing'.
- 'Covid-19, Finance & Government Supports for Business'.
- 'Online Marketing Pandemic Strategy, Who Did It Well & What Can We Learn from Them'.
- 'How to Stay on Top of Your Finances Through Covid-19 Challenges'.
- 'Getting Back to Work Safely'.
- 'Leading Ireland's Future Together - LIFT'.
- 'Programme for Government'.
- 'Consumer & Customer Experience'.
- 'Personal Resilience, the Work-Life Balance'.
- 'Cyber Crime & Security'.
- 'Economic Forecast'.
- 'The Latest Developments on Brexit'.

Innovation Week:

- 30 speakers over four days
- 8 panel discussions

Community Events included:

- Wellness Week.
- Blackthorn Park Launch: Teddy Bears' Picnic Art Competition.
- Winter Festival.

One of the highlights of a challenging year was the announcement by Mastercard that it is setting up its European Technology Hub in One and Two South County, employing over 1,500 people in 23,225 square meters of office space.

In relation to Infrastructure and Mobility, the new Blackthorn Park was developed; the final phase of the signage project for the district was completed, with updated maps of the 4 business parks providing way-finding for pedestrians, cyclists and motorists and further progress was achieved on the Sandyford Cycle Route.

Submissions were made on Budget 2021 addressing issues that impact directly on member businesses; Commercial Rates 2021 and the Pre-Draft Dún Laoghaire-Rathdown County Development Plan 2022-2028.

In relation to the environment, insect hotels were erected in Burton Hall Road; herbaceous borders were created in Stillorgan Business Park and the landscape maintenance programme was expanded to supplement routine works undertaken by the council.

REFERENCES

ⁱ 'The Sandyford Business District – An Analysis of Residential Supply Issues', Knight Frank.

ⁱⁱ IDA Press Release, 'Investment Flow Strong in First Half of Year – Continued Resilience Shown in Existing FDI Base' 12th July 2021.

ⁱⁱⁱ Sandyford Urban Framework Plan 2016-2022

^{iv} SBD – Value Proposition to Business Attractiveness' Executive MBA Capstone Project, Fenton Murphy, Gerard Kenny, Marcus O'Dwyer & Mark Ensor. UCD Michael Smurfit Business School, August 2017.