

**REPORT TO THE
MINISTER FOR ARTS, SPORT AND
TOURISM OF THE
LONDON 2012 OLYMPICS AND
PARALYMPICS TASKFORCE**

MARCH 2008

1. **Background**

- 1.1 The London 2012 Olympics and Paralympics Task Force was established by the Minister for Arts, Sport and Tourism in August 2006 to examine all possible opportunities; identify priority areas of interest; and map out a strategy with a view to ensuring that Ireland can benefit to the maximum extent possible from its proximity to the London 2012 Olympic and Paralympic Games. The membership of the Task Force is set out in the Appendix to this report.

- 1.2 Our similar climate, geographic proximity, good transportation links, common language and strong business and tourism links with Britain present many opportunities for Ireland to benefit from the London Games. In his remarks at the inaugural meeting of the Task Force, the Minister for Arts, Sport and Tourism referred to the Games as a once in a lifetime opportunity for Ireland to promote its culture, to open up new markets for tourism, to enable Irish businesses of all sizes to become involved in the substantial construction programme and supply of services before and during the Games, and to provide a massive boost and lasting legacy for sport in Ireland.

- 1.3 The Task Force met on six occasions. Its focus has been on (i) assessing the quality and suitability of Ireland's sporting and ancillary infrastructure in terms of its appeal to countries and athletes preparing to take part in the London Olympics and Paralympics; (ii) completing an economic evaluation of the potential impacts in the sectors of tourism, business and sport arising from Ireland's proximity to the 2012 Games; and (iii) identifying other beneficial spin-offs from the Olympics and Paralympics. We deal with each of these in the following chapters.

2. Ireland's sporting and ancillary infrastructure

2.1 The quality of Ireland's sporting infrastructure will be a key determinant of whether or not we can have realistic expectations of being a destination of choice for athletes completing their preparations for the Olympics and Paralympics. Team managers and athletes who decide on these issues will be at least as much concerned with the availability of state-of-the-art medical facilities, quality hotel and other accommodation, transportation within Ireland and between Ireland and Britain as the excellence of the sporting facilities themselves. Also, with the London Games now less than five years away, decision-makers even now will be drawing up their short-lists of potentially suitable locations. Two broad conclusions flow from all of this – time is of the essence and the bar will be set at a very high level. Ireland needs to put its best foot forward but it also needs to be realistic.

2.2 The Department of Arts, Sport and Tourism recently completed an assessment of the suitability of existing and planned future sports facilities. Based on this assessment, it briefed the Task Force on the suitability of Ireland's major sporting infrastructure for use by visiting athletes and teams. Holohan Leisure, who assisted the Department with the completion of an audit of national sports facilities, also made a presentation to the Task Force. The objective was to zero in on existing facilities which were deemed to be of Olympic/Paralympic standard and the upgrades which would be required to bring facilities at other centres up to the requisite standard which for the most part were to be found on university campuses and national sports-specific centres. These facilities were then assessed against current Olympic and Paralympic standards.

2.3 The London Organising Committee of the Olympic and Paralympic Games (LOCOG) have set out a detailed guide to the range and quality of facilities that are required for training and holding camps. In addition to high quality sports facilities, Olympic and Paralympic teams and athletes also require certain ancillary facilities such as:

- A range of accommodation and catering options to suit different budgets;

- Adjacent sports physiotherapy and medical facilities which include advanced scanner technologies;
- Proximity to an airport with direct international flights and in particular flights to London;
- Meeting, secure storage and treatment rooms;

which, ideally should be located close to each other.

2.4 There are a number of other factors which need to be borne in mind when assessing Ireland's ability to host training and holding camps for overseas athletes such as:

- The overriding needs of Irish athletes preparing for the 2012 Games;
- The availability of suitable accommodation for athletes during the tourist season;
- Many athletes require 4 and 5 star accommodation close to their training facility; and
- LOCOG are offering financial incentives to any national Olympic/Paralympic organisation that holds its training and holding camps in Britain.

2.5 Drawing both on the outcome of the Department's survey of potentially suitable facilities and consideration of the ancillary facility requirements of visiting teams, the Task Force has concluded that only the following relatively small number of locations/facilities have the potential to attract international athletes and teams:

Third Level Colleges

- University College Dublin (UCD)
- University of Limerick (UL)
- Cork Institute of Technology (CIT)
- University College Cork (UCC)
- Dublin City University (DCU)

National Sport Specific Centres

- National Basketball Arena, Tallaght
- National Rowing Centre, Inniscarra, Cork

National Sports Campus at Abbotstown

- National Aquatic Centre

- 2.6 Both UCD and UL, in particular, have benefited from significant investment in recent years in sporting and ancillary facilities including accommodation and both have previously catered for a number of international teams and events. Further investments are planned by both universities to enhance their attractiveness as locations for pre-Games training or qualifying events. Planned developments at UCD include a new multi-purpose hall, high performance facilities, an Institute of Sport and Health and a 50-metre pool meeting international standards. The estimated cost of the development is €76m and UCD are seeking Government funding of €20m.
- 2.7 Phase 1 of UL's development plan includes four astro-turf pitches to provide year round 24-hour facilities for Gaelic games, rugby, hockey and soccer. A riverside rowing centre is also proposed, designed to world class standards, to allow rowers year round access to a stroke technique facility. The estimated cost of the Phase 1 development is €29.45m and UL are seeking Government funding of €19.5m towards the development. There are also plans for a Phase 2 development to include a purpose-designed indoor pitch incorporating specialised sports training services and support facilities.
- 2.8 Both of these projects would significantly enhance the quality of Ireland's sporting infrastructure were they to proceed. They are unlikely to have much impact on our attractiveness to countries looking at Ireland as a location for pre-Olympic/Paralympic preparations if the decision on whether or not to go ahead with them is delayed for any length. While neither is exclusively targeted on London 2012, the facilities would unquestionably increase Ireland's attractiveness as a location for final pre-Olympic/Paralympic preparations. If, decisions to go ahead with these projects are not

taken in the immediate future, however, they will cease to be a factor on marketing our pre Olympic/Paralympic offerings.

- 2.9 DCU has a proposal to develop the Centre for Sports Science and Health into a potential Institute of Sport and Performance by building and expanding the current programme. DCU believes it could identify and nurture future medal winners drawing a cutting edge sport science technology and development programmes. In October 2006, Minister O'Donoghue visited the DCU Centre for Sports Science and Health to discuss the proposals to enhance the Centre at the University and in the course of that meeting it was agreed that DCU would provide a detailed submission for funding to the Department. However, there is no record of such a proposal having been provided in the intervening period.
- 2.10 While it is undoubtedly the case that the London 2012 Games will provide a powerful focal point for the development of Ireland's sporting infrastructure, any assessment of the economic justification for infrastructural investment must also factor in long-term legacy effects.
- 2.11 The National Aquatic Centre is now fully operational, meets all of the Olympic/Paralympic requirements for four Olympic and Paralympic (swimming, synchronised swimming, diving and water polo) sports and is immediately available as a training centre for both Irish and international teams and for hosting qualifying events. This is illustrated by the fact that the Irish National Long Course Swimming Championship, scheduled to be held in the National Aquatic Centre in May 2008, has been certified by FINA as an event in which international swimming athletes can record qualifying times for the Beijing Olympics and Paralympics.
- 2.12 The recent Government decision to proceed with the development of a Sports Campus at Abbotstown has been widely welcomed as a significant step in the creation of a modern sporting infrastructure in Ireland. Investment by the State in the Abbotstown Campus under the National Development Plan is €149m. The expectation is that this centre will

provide state-of-the-art training facilities for our elite sportsmen and sportswomen and will also achieve international recognition for Ireland as a location of choice for sporting excellence. The Task Force initially viewed the Abbotstown Campus as a potentially significant resource in a campaign to attract teams and athletes to complete their preparations for London 2012 here but it now understands that planning and other issues have delayed the rollout of the Campus. With Phase 1 of the development due for completion at end 2010/early 2011, it will have less of an impact on decision-making for the London Games but it has significant potential to support the bid for the UEFA U-21 championship finals in 2011 and as a base for soccer teams which ultimately qualify for London. Nevertheless, the Task Force urges all those involved in the delivery of the project to speed up its completion to at least ensure its availability to elite Irish athletes completing their pre-Olympic/Paralympic preparations and also to any overseas competitors/countries who may not have finalised their training arrangements at that point.

- 2.13 The opportunities for spin-off benefits for Ireland from the decision of the International Olympic Committee to award the 2012 Games are real. To get an accurate 'fix' on the scale of these benefits, however, it is necessary to assess them against a broad economic framework. Accordingly, the Task Force decided to commission an economic evaluation of the gains likely to accrue to Ireland from its proximity to London. The results of that evaluation are presented in the following chapter.

3. Economic Evaluation of the benefits to Ireland from the proximity of the London 2012 Olympic and Paralympic Games

3.1 Terms of Reference

The Task Force commissioned Indecon International Economic consultants to analyse and evaluate the potential economic benefits to Ireland from the London 2012 Games. The terms of reference for the evaluation identified the key elements as follows:-

Sporting:

- To estimate the potential economic value of Olympic and Paralympic teams visiting Ireland for training purposes in the years 2009-2012.
- To estimate the potential economic impacts arising from the possibility of hosting Olympic/Paralympic-level qualifying events in Ireland in the lead up to London 2012.

Business:

- To measure the benefits to the Irish economy and Irish businesses arising from the supply of goods and services to the London Games.

Tourism:

- To evaluate the economic benefits of attracting additional visitors before, during and after the Games.

with a view to arriving at an overall set of conclusions and to formulate recommendations which can inform policy decisions on the potential allocation of State funding for investment in sporting facilities to maximise the potential economic and legacy benefits for Irish sport.

Indecon's findings, conclusions and recommendations are presented in the following paragraphs.

3.2 Sporting benefits

Training-related benefits

The evaluation of the sports training-related opportunities for Ireland leading up to London 2012 zeroed in on the assessment of the potential to attract additional Olympic/Paralympic-level athletes to Ireland from 2009 onwards and was undertaken on a facility-by-facility basis, focussing on the following major sports facilities considered to meet the requirements of high performance athletes:

- University of Limerick (UL),
- University College Dublin (UCD),
- University College Cork (UCC),
- Dublin City University (DCU), and
- National Aquatic Centre (NAC).

Taking the existing levels and projected growth in usage of the sports facilities at UL, UCD, UCC, DCU and the NAC and applying evidence-based assumptions regarding the typical frequency and extent of usage, and the expenditure patterns among Irish-resident and overseas Olympic and Paralympic athletes, Indecon estimates that overall gross expenditures among athletes attending these facilities will total approximately **€10 million** over the period 2009 to 2012 (when the training cycle for London 2012 will occur). Applying a multiplier factor to reflect the economy-wide benefits of these additional expenditures yields an estimated gross economy-wide impact of almost **€12.5 million** between 2009 and 2012 and a net economy-wide impact of **€1.25 million** over the period 2009-2012 across the facilities, or **€0.31 million per annum** in annual terms.

The report also deals with the potential of the Abbotstown Sports Campus to host Olympic/Paralympic-level athletes wishing to come to Ireland to complete training. As already mentioned, the Campus is now unlikely to be ready before late 2010/early 2011. This will almost certainly preclude significant pre-London 2012 training business commencing in 2009 but may have some potential to host qualifying tournaments/events.

While the report acknowledges that Ireland may offer a number of advantages in terms of pre-Games training related opportunities owing to its proximity to London, its similar climate and the fact that it is English-speaking, it recognises that very rigorous criteria are being set by the Olympic, Paralympic and London 2012 authorities in relation to Olympic and Paralympic training camps/facilities and venues. It also notes that there are many potential sites in the UK and other countries in Europe and the competition to host teams will be intense.

3.3 Sports event-related benefits

The potential economic impact of hosting Olympic and Paralympic qualifying and other major sports tournaments/events is dictated primarily by the following factors:

- The scale of events hosted, including the numbers of competitors, support team delegates, officials, media representatives and, in particular, the number of spectators;
- The number of days over which the event(s) would take place;
- The expenditures of participants and spectators at the event(s), including by out-of-state visitors in the form of tourism revenues.

The report identifies a number of sports in which, following discussions with the relevant National Governing Bodies (NGBs), the Olympic Council of Ireland and members of the London 2012 Taskforce, Indecon believes that Ireland has a strong case to make for hosting significant scale international sporting events in the lead up to the 2012 Games. While the probability of successfully hosting a major Olympic/Paralympic qualifying tournament or similar scale sports event will be influenced by a range of factors, two aspects are likely to be of particular importance, namely:

- Availability of world-class infrastructure and facilities, which meet the strict requirements of Olympic/Paralympic-level teams and have the necessary spectator capacity;
- Track record in hosting similar events in the past.

Based on its consultations with NGBs across a number of sports, Indecon concludes that efforts to attract major qualifying tournaments should be focused on the following five events:

1. UEFA U-21 Soccer Championships (2011)
2. World Amateur Boxing Championships (2011)
3. European Eventing Championships (Equestrian) (2011)
4. Women's European Nations Hockey Championships (2011)
5. National Long Course Swimming Championships (2008)

Ireland has previously hosted three of the above international events, viz. boxing, eventing and hockey.

It is estimated that if the UEFA U-21 Soccer Championships were awarded to Ireland as an all-island tournament, the potential gains could amount to **€17.1 million** in gross expenditure terms and **€2.1 million** in net economic terms (after inclusion of multiplier impacts and adjusting for the opportunity cost of resources utilised). This reflects the likely scale of competitor participation and particularly spectator attendance at an event which would run over nine days. The Football Association of Ireland (FAI) is jointly bidding for this event with the Irish Football Association. There are five other bids with UEFA to host these championships. The FAI has also formally lodged a bid for the UEFA Cup Final of 2011 to be played at Lansdowne Road. The bid was shortlisted from an initial list of 13 applications down to 6 and the UEFA Inspection Team recently visited Dublin to view the site of the new stadium at Lansdowne Road and also visited a number of potential venues for hosting events connected with the UEFA Cup Final. The decision on the award of the 2011 final will be made by UEFA in March 2008.

Indecon also identifies the World Amateur Boxing Championships, previously held at the Odyssey Arena in Belfast in 2001, as having very substantial economic impacts, again reflecting the number of athletes and support staff participating and the anticipated large

spectator interest. The Irish Amateur Boxing Association (IABA) is actively pursuing the bid to host the tournament, which would be a London 2012 qualifying competition. The IABA is celebrating its centenary in 2011 and this is seen as an appropriate event for the centenary celebration. The Board of the IABA has arranged a meeting with the Irish Sports Council to discuss and get their support for the bid and is setting up a special committee under the Chairmanship of Dr. John Lynch (CIE) to organise the bid and seek sponsorship for the event. They are now examining the possibility of hosting the event in the City West complex. The main competition to host the event is likely to come from Russia. It is estimated that this event would generate **€9.7 million** in gross expenditures and **€1.2 million** in net economic impacts.

In the equestrian area, Ireland previously hosted the European Eventing Championships in 1994 at Punchestown. While the report acknowledges that equestrian sports do not generally have the same mass appeal as, say, a major international soccer event, it argues these championships could nevertheless attract a significant attendance. It estimates that the event could generate approximately **€3.7 million** in gross expenditure terms or **€0.5 million** in net economic terms. The awarding body for the 2011 European Championships is the Federation Equestre Internationale (FEI) which is the international Governing body for equestrian sport based in Switzerland. The closing date for countries to express an interest in hosting the championships is 15 May 2008. Horse Sport Ireland became the National Governing Body for Equestrian Sport on 1 January 2008 and will be submitting a formal expression of interest. They have had some informal contact with the FEI and as of yet no other country has submitted an expression of interest or enquired informally about doing so. Horse Sport Ireland has also had discussions with Punchestown about making a formal bid and they are very supportive of the concept.

Another major event where Ireland has a successful previous track record is the Women's European Nations Hockey Championships, which was last hosted at the National Hockey Stadium in Belfield, Dublin, in 2005. The Women's Hockey World Cup was also held in Belfield in 1994. The Irish Hockey Association is currently seeking to host this event, which would be a qualifier for London 2012. The new policy of the European Hockey

Federation is to award the hosting of such tournaments to countries with major consideration given to sponsorship opportunities i.e. at the request of an existing sponsor of European Hockey or at the request of a new "local" sponsor of the Tournament who would also commit to sponsoring European Hockey. The 2009 European Championships are being held in Holland and it is the practice of the European Hockey Executive Board not to progress the hosting arrangements until after the completion of the previous event. Irish Women's Hockey is currently sponsored by ESB. This sponsorship is scheduled for renewal in the spring of 2008 and discussions will commence shortly in this regard. The Irish Hockey Association is prepared as part of these sponsorship renewal discussions to highlight the hosting of the 2011 European Championships as a key event in the International Tournament cycle and to explore possible sponsorship of this event. If Ireland were to be successful in attracting this event again in 2011, the report estimates that the tournament could generate **€2.1 million** in gross expenditure terms or **€0.3 million** in net economic impacts.

Finally, another sport offering some event-related potential in the lead up to London 2012 is swimming. Indecon's discussions with the National Aquatic Centre identified the National Long Course Swimming Championships as an event that could generate additional revenues. As this represents a national qualifying competition for the Olympics and Paralympics, the report considers that the impacts are likely to be focused on domestic expenditures, with comparatively small numbers of overseas visitors participating. The championships, which are scheduled to take place at the NAC in May 2008, will run over four days and involve 40 events (250 swims) for Irish Olympic and Paralympic athletes. Indecon estimates that some 500 athletes and their support staff are likely to attend the championships. The NAC has the capacity to seat up to 2,500 spectators but the report estimates that the event would be likely to attract 500 spectators per day. The report estimates that the championships could generate approximately **€0.57 million** in gross expenditure incurred by competitors, delegates, officials, media representatives and spectators attending the event. The estimated net economic impact of the event is **€0.07 million**.

3.4 Tourism benefits

The assessment of the tourism-related opportunities for the island of Ireland considers the following potential additional ‘visitor streams’:

- **Pre-Games Phase (2009-2012):**
 - Pre-Games athlete training: potential to attract overseas athletes to Ireland; and
 - Pre-Games events: potential to attract overseas teams and spectators to compete in Olympic and Paralympic qualifying events.

- **During Games Phase (2012):**
 - ‘Side Visits’ among international visitors to London/UK;
 - Visitors attending Olympic and Paralympic Games but who decide to use Ireland as a base during the Games period; and
 - ‘Runaways’ – UK residents who wish to ‘escape’ the London area during the Games

- **Post-Games Phase (2012-2017):**
 - Potential to generate repeat visits to the island of Ireland associated with visitors who come in the during-Games phase.

Indecon estimates that the Irish economy could realise some **€8 million** in gross additional tourism receipts, taking into account pre-Games sports training and event-related tourism activity, additional visitors to Ireland during the period when the Games are being staged and post-Games legacy benefits through repeat tourism. In net economic terms, these additional tourism receipts would generate an additional **€7.3 million** across the Irish economy as a whole when multiplier impacts and the opportunity cost of resources utilised are factored into the analysis.

In relation to Northern Ireland, the report assumes that, with regard to pre-Games tourism benefits, the UEFA U-21 Soccer Championships would take place on an all-island basis, with half the matches being played in Ireland and the remainder in Northern Ireland. This would result in a sharing of the economic benefits of this major event, including the impacts of overseas spectator expenditures, between both jurisdictions. Taking this into account and including the estimated during-Games and post-Games legacy benefits, the report estimates that Northern Ireland tourism could benefit to the tune of **€11.4 million** in gross expenditure terms. This would be equivalent to **€1.4 million** in terms of net benefits across the Northern Ireland economy as a whole.

The report notes that these potential impacts of estimated tourism benefits are not autonomous and must be seen within the context of the competitive nature of the international tourism industry. In particular, it is likely that very strong competition for visitors across the visitor streams identified will occur, with national governments and tourism agencies all striving to tap into the potential spin-offs for tourism generated through the London Games. To maximise the probability of realising these benefits, there is a need to ensure that tourism agencies have in place effective marketing and promotion strategies targeted at the relevant market segments.

3.5 Business benefits

The report identifies the following sectors as most likely to benefit from the investment and other expenditures incurred in the pre-Games preparation period and during the staging of the Games:

- Construction of facilities
- IT/communications infrastructure
- Security planning
- Media and publicity
- Cultural programme
- Sports events and management
- Transport and traffic management.

In relation to Irish business, the commercial benefits surrounding the London 2012 Games will be focused on the export opportunities at sectoral level created through the additional demand generated within the UK economy. (We refer in Chapter 4 to the proactive strategies being pursued by Enterprise Ireland to increase awareness of these opportunities.)

The study evaluated the potential economic impact of the business-related opportunities for Ireland using a general equilibrium model of the UK economy which used as its initial inputs the estimated budget for preparation of infrastructure for the Games and the anticipated figures in relation to attendance and expenditures during the staging of the Games.

The latest estimates available from the London Organising Committee for the Games (LOCOG) and the Olympic Delivery Authority (ODA) indicate that the infrastructure spend ahead of London 2012 and operational expenditures associated with the staging of the Games are likely to be of the order of €7 billion, excluding contingency estimates, or approximately €1 billion if one includes the contingency estimate of up to €4 billion.

The report estimates that Irish business will benefit from the expenditures related to the preparation for and staging of the London 2012 Games through additional exports to the tune of between **€100.5 million** and **€139.3 million** in gross terms over the period 2005-2016 (depending on whether the estimated contingency figure supplied by LOCOG/ODA is included). After adjusting these figures to reflect the economy-wide multiplier impacts of this additional demand in the Irish economy, and also to reflect the opportunity cost of resources used in producing these exports, it is estimated that London 2012 will result in a net economic impact through the export sector amounting to between **€2.6 million** and **€17.5 million** overall between 2005 and 2016. These estimates are based on existing trade ratios involving Irish exports into UK markets.

It is also possible that even higher export impacts for Ireland could be generated through its engagement with London 2012 if more intensive market and promotional efforts on the part of development agencies and Irish business were to result in increased market shares within the UK. Assuming that trade ratios increase by 10% over existing levels, the report estimates that the net economic impacts could rise to between **€13.9 million** and **€19.2 million** overall between 2005 and 2016.

In terms of specific sectors, based on existing levels of penetration by Irish exporters into UK markets, the sectors which stand to gain most from London 2012 would include the manufacturing sector (where additional exports of **€9.7-13.6 million** would arise) and business services (**€1.4-2 million** in additional exports).

Businesses in Northern Ireland would also stand to benefit from London 2012 through inter-regional trade supplying the Games. Based on existing patterns of trade and regional output in the UK, and the estimated Games expenditures, the report estimates that Northern Ireland could generate **€9.1 million** and **€5.1 million** in additional exports over the period 2005-2016. These benefits would be concentrated in the manufacturing sector. The overall gross impact is estimated to give rise to a net economic impact of between **€7.4 million** and **€10.7 million**. If market shares were boosted by 10%, this could increase to between **€8.2 million** and **€11.8 million**.

3.6 Summary of overall gross and net benefits.

The economic impacts of sporting, tourism and business opportunities for Ireland arising from London 2012 described in the preceding paragraphs may be summarised below:-

	Estimated Gross Expenditure benefits €Million	Estimated Net Economic Impacts €Million
Sporting Opportunities		
Pre-Games Training (UL, UCD, UCC, DCU & NAC) Total Over Period 2009-2012	10	1.25
Pre-Games Sports Tournaments/Events		
Soccer	17.1	2.1
Boxing	9.7	1.2
Equestrian	3.7	0.5
Hockey	2.1	0.3
Swimming	0.6	0.1
Tourism Opportunities (pre-, during- and post-Games)		
South	57.7	7.3
North	11.4	1.4
Total	69.1	8.7
Business Opportunities (sectoral exporting impacts)		
South –2005-2016	100.5 – 139.3	12.6 - 17.5
North–2005-2016	59 – 85.1	7.4 - 10.7
Total	159.5 -224.4	20 –28.2

3.7 Indecon's Conclusions

In economic terms, the largest potential benefits to be derived from London 2012 for the island of Ireland lie in the business and tourism areas. That said, there are also some potentially very significant short-term beneficial economic impacts to be realised were Ireland to succeed in attracting and hosting one or more major sports events in the run-in to the Games. There is also the potential to capture significant longer-term legacy benefits. The report draws the following conclusions:

Sporting

- The realisation of the sporting benefits will be critically dependent upon the application of a strategic and targeted approach to investment in the development of world-class facilities, which would yield benefits in terms of attracting Olympic and Paralympic-level athletes to Ireland to engage in training and boosting general levels of participation in Irish sport.
- The promotion of existing infrastructure will be essential in maximising the benefits for Ireland.
- Any investment in expanding sports sector capacity, whether it for improving training or holding camps or for new sporting venues, is likely to be most effectively targeted at facility provision that represents a genuine strategic and community need over and above any requirement relating to the 2012 Games.
- Timescale in planning for events means that any significant new investment which is not already in pipeline is unlikely to impact on overseas decision makers. Facilities or plans for facilities together with their funding and completed construction date need to be in place by the end of the Beijing 2008 Olympic and Paralympics and no later than 2009. Any slippage in timetables on investment in major sports infrastructure projects which is underway would adversely affect benefits for Ireland

- It is unlikely that the economic benefits from the London 2012 Games would on their own justify investment in any new sporting facilities unless there were substantial sporting legacy benefits.

Tourism

- There are potentially very substantial benefits for Irish tourism to be realised from the London 2012 Games. These benefits are likely to be captured in the period leading up to the Games, during the staging of the Games and in the period following the Games, with the primary economic impacts likely to be concentrated in the during-Games period. In addition, many of these additional visitors to Ireland, based on previous experience, are likely to come back to Ireland at a later date, thereby generating longer term, legacy benefits for Irish tourism. There is a clear case for using the Olympic and Paralympic Games as a catalyst to drive forward existing tourism programmes and strategies to maximise the longer term and legacy impacts of the Games. However, given the likelihood of strong competition for potential visitor groups among other markets, actual outcomes are likely to depend critically on the focus and success of marketing and promotion efforts applied by the tourism agencies.

Business

- In the business area, the impacts of investment/development expenditures in the lead up to the Games in terms of additional demand for Irish exports are largely autonomous in nature. However, it is possible that through more intensive marketing and promotional activities, penetration of UK markets and therefore Irish export success could be boosted further. (See commentary in Chapter 4 on initiatives taken by Enterprise Ireland.)
- There is a significant opportunity for development agencies to leverage London 2012 to enhance our skills base and marketing/promotion of Irish indigenous industry in UK market.

General

- There is a clear relationship between plans to achieve benefits for Ireland directly related to Olympic/Paralympic events and ‘local’ strategy in relation to investment in sports infrastructure and marketing and promotion efforts in the tourism and business sectors.

3.8 Indecon's Policy Recommendations

The report also presents a set of policy recommendations for the guidance of decision-makers if the benefits accruing to the island of Ireland arising from the London 2012 Games are to be maximised.

Sporting

- Within the annual Sports Capital Programme, priority should be given in relation to both the level and timing of investments to projects which can demonstrate a clear link with achievement of sporting and economic benefits from the Olympics and Paralympics.
- A strategic approach to investments in sports facilities should be pursued, which focuses investment on facilities having the strongest existing track records in attracting high performance athletes and with the potential to attract events and training activities which maximise potential legacy impacts
- Marketing and promotional activities aimed at attracting Olympic/Paralympic-level athletes to Ireland to engage in training/preparation in the lead up to London 2012 should focus on the existing major sports facilities located at the existing third level universities

Tourism

- Additional focus should be placed by tourism agencies on supporting marketing and promotional opportunities which target potential additional visitor streams arising from London 2012

Business

- Maintain the momentum of programmes being pursued by the Development Agencies to identify and promote sectoral business opportunities for indigenous Irish exporters leading up to and following London 2012

General

- A strong collaborative approach should be developed and maintained between both jurisdictions so as to maximise the potential benefits of London 2012 for both parts of the island of Ireland

3.9 Position of the Task Force

The Task Force fully endorses and supports the conclusions and recommendations in the Indecon Report.

4 Other Issues

4.1 Enterprise Ireland

The Indecon Report has highlighted the potentially significant benefits likely to accrue to this country through successful engagement with the construction sector (including sub-supply) opportunities, which arise in connection with the London 2012 Games. While it is ultimately a matter for Irish business – firms and business organisations – to gear up to go after these opportunities, Enterprise Ireland has been actively involved in identifying and promoting these opportunities. The London office of Enterprise Ireland (EI) has been engaged in business development work around the London Games since early 2006. The strict procurement standards employed by the Olympic Delivery Authority combined with the electronic tendering system put in place to deal with all procurement for the games present a unique challenge for the Irish construction sector, not only in how they access information and potential buyers, but also in terms of how they must prepare to compete on tenders that have tougher demands on certification in a range of areas – sustainability, corporate social responsibility, environmental policy, health and safety etc.

Enterprise Ireland's efforts have focussed on the following three areas:

1. Dissemination of information - providing project and contact information on all Olympic/Paralympic and related regeneration and infrastructure projects, communicating Olympic/Paralympic procurement charter and pre-qualification criteria.
2. Developing relationships - developing inter-agency relationships with public sector bodies involved with the Games as well as developing EI's position as the gateway to the innovation and capabilities of the Irish construction sector for the private sector delivery partners.
3. Developing programmes to be delivered in Ireland that will drive a step change in the industry and the way it views international markets.

Progress in the above three areas of focus is set out overleaf.

Inter-agency projects/Initiatives

A range of networking events have taken place bringing together key players in the construction services sector with potential partners and Olympic/Paralympic delivery partners in the UK. A Ministerial dinner arranged by Enterprise Ireland London in November 2006 set the stage for these smaller events, bringing together client companies and all the Olympic/Paralympic and London regeneration agencies/delivery partners/specifiers/consultants/contractors known at the time. By boosting EI's profile within these organisations while introducing them to the best product and service offerings EI's clients have for the Olympic works, the agency has begun to position itself as the gateway to the innovative products and services developed in Ireland. Following on from the work done in 2006, EI London is now working with the London Development Agency and the Olympic Development Authority to position EI clients with products and services that have real value offerings for the Olympics and Paralympics as preferred/approved suppliers.

Olympic Updates

A newsletter goes out to all construction and related clients on a quarterly basis to inform and update on all aspects of the Olympics – appointments, tenders, contracts, contract notices and awards etc. As well as the newsletter, EI has also made the entire Olympic build programme project tender details available to all client companies actively seeking Olympic work. This includes summarised project details, developer details, specifier/designer details and consultant details.

Extended Press Coverage Programme

A project to boost profile of most innovative/interesting client companies using UK press focussing on two key channels:

- 1 Editorial profiles/interviews;
- 2 Sponsored company/country profiles. Visits to key clients arranged for journalists from major trade publications and relevant nationals. This

programme hopes to boost the recognition of Irish companies amongst the specifying and procurement communities in the UK, especially those involved in the Olympic/Paralympic delivery programme.

'Fill these boots' Campaign

The development of a network of Irish professionals in UK construction. The campaign has already delivered access to senior management in a range of Irish owned UK sector companies. This has led to a range of Client-Buyer introductions as well as helping to position EI as a regular point of call for all these companies when they are looking to improve/diversify their supply chain. Many of these companies are approved Olympic/Paralympic contractors and are key to second and third tier project appointments, in particular, the infrastructure specialists who are already involved in Olympic work.

Future Events/Projects

Enterprise Ireland hosted the 'Building Towards London' Conference in Dublin on 14th November 2007 bringing key public and private sector Olympic and Paralympic delivery partners to Dublin to address a cross-section of Irish industry on the challenges and opportunities Irish companies face in striving to contribute to the success of the Games. Throughout the course of 2008, EI London will continue to work with the relevant organisations to arrange a series of smaller, more focused networking events for its client companies and the Olympic and Paralympic delivery partners and specifiers.

4.2 Contacts with the London Organising Committee for the Games (LOCOG)

The Task Force has been kept au fait with developments in London's preparations for the Games by Mr Pat Hickey, President of the Olympic Council of Ireland. Mr Hickey's working relationship with Lord Seb Coe, Chair of LOCOG, has created opportunities for an ever closer sharing for Ireland in the Olympic and Paralympic experience. It is expected that Lord Coe will visit Dublin in 2008 to discuss opportunities for practical co-operation and involvement with the Authorities here. During the course of his visit, he will have discussions with the Taoiseach and the Minister for Arts, Sport and Tourism.

Two specific initiatives will be discussed with Lord Coe during his visit here – arrangements for a visit to Ireland sometime in 2008 by the LOCOG Road Show to take the London Olympics and Paralympics message to the general public and arranging for the Olympic Torch Run to tour in the island of Ireland.

The Olympic Council of Ireland has also recently agreed a memorandum of understanding with the Japanese Olympic Committee which relates to the hosting of the Japanese Olympic squad to acclimatise in Ireland immediately before the London 2012 Games.

4.3 North South Cooperation

In his remarks at the inaugural meeting of the Task Force in August 2006, the Minister for Arts, Sport and Tourism, expressed his particular aspiration that London 2012 would provide opportunities for expanded North-South collaboration. Northern Ireland's direct involvement in the successful British bid for the Games clearly positions it to be a significant beneficiary from the rollout of the Games in terms of hosting events and training camps and in that respect has access to support which are not available in this jurisdiction. Nevertheless, as the Indecon analysis presented in Chapter 3 of this report illustrates, there are significant opportunities for many of the gains from association with London 2012 to be realised on an all-island basis. The Task Force understands that meetings have already taken place at both Ministerial and official level between the Department of Arts, Sport and Tourism and the Northern Ireland Department of Culture, Arts and Leisure which have recognised the scope for all-island co-operation around the London 2012 Games. Exploration of these joint opportunities is to be welcomed and the Task Force urges all involved to step-up the pace of cross-border collaboration around the Games.

4.4 Community Issues

The focus of this report has understandably been on identifying and capturing the economic and sporting benefits to Ireland from the London Games. But there are wider societal gains to be realised from our engagement with the Games, notably the

opportunities for using a major international sporting event which is taking place in close geographic proximity to this country to promote values such as the contribution of sport to positive lifestyles which can only have a beneficial impact on community health. Also, as the experience of the 2003 Special Olympics World Summer Games amply illustrates, the London Olympics and Paralympics will undoubtedly create opportunities for major volunteer involvement both here and in Britain. This if imaginatively harnessed and encouraged, could have significant long-term positive impacts on our sense of national well-being.

5. **Task Force Recommendations**

The Indecon evaluation of the benefits to Ireland from the London Olympics and Paralympics have been summarised in Chapter 3 of this report and the Task Force has endorsed the policy recommendations listed at paragraph 3.8. In this chapter, the Task Force wishes to focus attention on the following key issues.

Sporting

The London 2012 Games represent a once in a lifetime opportunity for Ireland both in terms of the participation of our elite athletes and in leaving a legacy for sport after 2012. The hosting of qualifying tournaments and the provision of training bases for participating athletes has the potential to provide a welcome boost to sport in this country. In particular, it is hoped that it will generate a keener interest in Olympic and Paralympic sports, perhaps even leading to greater participation and improved performances on the world stage in the future. It is important that high quality sports facilities are available in the years leading up to the 2012 Games, in the first instance, for the benefit of Irish elite athletes and secondly to provide the best possible opportunity to attract international athletes and events in order to maximise the potential benefits identified in the Indecon Report. It is important that any decisions relating to the sporting opportunities identified are taken quickly given that the Games are now less than five years away. In this regard, a recent press article is attached which refers to the designation of specific locations in Northern Ireland for the provision of training facilities for athletes preparing for the London 2012 Games.

It is recommended that:

- **decisions should be taken quickly on the key infrastructural projects which have been identified in the Facilities Audit as likely to enhance Ireland's appeal to athletes and teams seeking a suitable location at which to complete their pre-Olympics/Paralympics training:**
- **additional funding should be allocated to support the marketing of the key sport facilities identified.**

- **priority is given to the completion of Phase 1 of the National Sports Campus at Abbotstown which will provide ideal sports and ancillary facilities, including accommodation, for both Irish and international athletes;**
- **in relation to the sporting events identified by Indecon as possible events for Ireland to host, additional funding and other support should be allocated to each of the relevant National Governing Bodies to assist in their bids to host these events. Ireland already has a proven track record in hosting major international sporting events including the 2006 Ryder Cup and the 2003 Special Olympics World Summer Games which generated significant economic benefits for Ireland and lasting benefits for the tourism industry.**

Arts and Tourism

In terms of the medium to long-term development of tourism in Ireland, it is recognised that the new and developing (Long Haul) markets offer the greatest potential for growth. One of the problems with these markets is the issue of "brand recognition" and a lack of knowledge with regard to Ireland's geographical location. The 2012 Games should present opportunities to propagate the message of the attractiveness of Ireland. During the course of the games themselves, there will be a huge media presence in London. In terms of the pre-games phase, the Indecon report also talks about the potential to attract overseas athletes and visitors for Olympic and Paralympic qualifying events. The underlying presumption in the Indecon Report is that there is sufficient spare capacity in accommodation etc to absorb the project growth in visitors and hence not displace existing business. In general, September is a busy tourism month, particularly in Dublin and it should be borne in mind that the necessary capacity may not exist.

The London 2012 Games also offer opportunities in the areas of arts and culture as part of the wider experience of the Games.

It is recommended that:

- **the Arts, Cultural and Tourism Agencies work together to explore the opportunities for Irish arts and cultural events to maximise the potential tourism benefits.**
- **specific additional modest and targeted funding for the purposes of promotion of tourism and cultural activity in the years leading up to London 2012 should be placed at the disposal of the Tourism Agencies and the Arts Council**

Business

The Indecon report concludes that the largest potential benefits of London 2012 for Ireland lies in the business area. The Task Force endorses the work of Enterprise Ireland who has been actively pursuing opportunities to maximise the potential benefits across all the business sectors.

North-South Cooperation

Discussions between Government Agencies on both sides of the border on how best to capture the benefits for London 2012 on an all-island basis should be pressed ahead with all possible speed. It is suggested that this should be an appropriate agenda item for discussion at North/South Ministerial meetings.

Membership of the London 2012 Task Force

Philip Furlong (Chair)	Former Secretary General of the Department of Arts, Sport & Tourism
Gillian Bowler	Businesswoman & Chair of Fáilte Ireland
Olive Braiden	Chair, Arts Council
Des Casey	Former Honorary Secretary of the FAI & UEFA Life Member
Anne Ebbs	Secretary General of the Paralympic Council of Ireland
John Fitzgerald	Former Dublin City Manager
Dan Flinter	Former Chief Executive of Enterprise Ireland & Chair of the National Sports Campus Development Authority
Pat Hickey	President of the Olympic Council of Ireland & President of the European Olympic Committees
Seán Kelly	Former president of the GAA and Executive Chairman of the Irish Institute of Sport
Ossie Kilkenny	Chair of the Irish Sports Council
Noel Murphy	Former President of IRFU & IRB Council Member
Mícheál Ó Suilleabháin	Chair of Culture Ireland (replaced by Eugene Downes, Chief Executive of Culture Ireland on 13 June 2007)
Paul O'Toole	Chief Executive Tourism Ireland
Peter Quinn	Businessman & former President of GAA
Ray Rooney	Businessman & former Senior Steward of the Turf Club
Donagh Morgan	Assistant Secretary, Department of Arts, Sport and Tourism (from 13 June 2007)



North offers facilities to Olympic hopefuls **Olympic Games**

BY Staff reporter

04/03/08

MANY of Northern Ireland's best sporting venues will be included in the London 2012 Pre-Games Training Camp Guide.

The London Organising Committee for the Olympic Games (LOCOG) announced yesterday that 27 venues in Northern Ireland will be included in the guide, to be published at this year's games in Beijing. The guide lists over 600 high-quality sports facilities across the UK which are capable of hosting visiting teams or individual athletes wishing to take part in the 2012 games.

Sports Minister Edwin Poots MLA welcomed the announcement at Lisnagarvey Hockey club, one of the venues chosen to appear in the guide, commenting: "We have some very high-quality facilities in Northern Ireland and I am very pleased to see them recognised and included in the Pre-Games Training Camp Guide. Our venues are a match to those in the rest of the UK and we should be very proud of what we can offer to the rest of the world.

"I want to see a legacy from the Olympic Games that will last far beyond 2012. We can use this opportunity to boost our sporting infrastructure, promote Northern Ireland as a tourist destination and prepare for the forthcoming World Police and Fire Games in 2013."

The minister also visited Andersonstown Leisure Centre, to congratulate its staff on their success in being one of the 27 sports venues to appear in the guide.

The guide will be circulated to all National Olympic Committees (NOCs) and National Paralympic Committees (NPCs). These organisations will then decide where they base themselves or where to send individual athletes to prepare and acclimatise for London 2012.

Poots continued: “We still have some way to go to ensure we can get teams to Northern Ireland. There is fierce competition among the venues and it is up to the regions and venues to sell their wares and make sure they stand out from the crowd.”

LOCOG is offering a financial award of up to £25,000 to NOCs/NPCs to help encourage teams to base themselves in the UK.

Sebastian Coe, Chairman of the London Organising Committee, commented: “The process we have been through shows a great spread of high quality facilities throughout the UK that can be used by elite level athletes and the online website can continue to be used after the games to locate sporting facilities.

“We said that we wanted the London Games to be for athletes, and the facilities listed in this guide will really help overseas athletes prepare well. It also provides a great opportunity for towns throughout the UK to get involved in our plans.”

NORTHERN IRELAND’S OLYMPIC TRAINING VENUES

Andersonstown Leisure Centre: Boxing; Antrim Forum Complex: Athletics, Judo, Table Tennis, Taekwondo, Wrestling; Ballyholme Yacht Club: Sailing; Banbridge Amateur Boxing Club: Boxing; Bangor Castle Leisure Centre: Swimming, Synchronised Swimming, Water Polo, Beach Volleyball; Bangor Sportsplex: Athletics; Carrickfergus Sailing Club: Sailing; City Of Lisburn Salto National Gymnastics Centre: Rhythmic Gymnastics, Artistic Gymnastics, Trampoline; Glengormley Amateur Boxing Club: Boxing; Glentoran Football Club: Football; Grosvenor Grammar School: Fencing; Grove Wellbeing Centre: Road Cycling; Killowen/Carlingford Lough: Sailing; Lisnagarvey Hockey Club: Hockey; Mary Peters Athletics Track: Athletics; Mid Ulster Sports Arena: Archery; Monkstown Boxing and Community Sports Facility: Boxing; National Badminton Centre: Badminton; North West Regional Sports Campus: Boxing, Fencing, Judo; Northern Ireland Civil Service Sports Association: Road Cycling; Olympia Leisure Centre: Football; Portmore Equestrian Centre: Equestrian; Queen’s Sport, Queen’s University Belfast:

Hockey, Judo, Table Tennis, Taekwondo; The Boys' Brigade Ganaway Training and Activity Centre: Road Cycling; Ulster Lakeland Equestrian Park at Necarne: Equestrian; University of Ulster at Jordanstown: Archery, Badminton, Basketball, Boxing, Fencing, Trampoline, Hockey, Judo, Table Tennis; Valley Leisure Centre: Boxing.