



Tionól Réigiúnach
an Deiscirt

Southern Regional
Assembly

Regional Spatial and Economic Strategy (RSES) for the Southern Region

2027 - 2040

Issues Paper

March 2026





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1 Introduction

This paper is one of a series of four issued to assist input from the public and other stakeholders to the pre-draft consultation process for the review of the Regional Spatial and Economic Strategy for the Southern Region (RSES) which takes place from 26th March 2026 to 22 May 2026.

The other papers available at consult.southernassembly.ie are:

- Cork Metropolitan Area Strategic Plan (C-MASP) Issues Paper.
- Limerick-Shannon Metropolitan Area Strategic Plan Issues Paper (LS-MASP).
- Waterford Metropolitan Area Strategic Plan (W-MASP) Issues Paper.

The Southern Regional Assembly has commenced the review of the Regional Spatial and Economic Strategy for the Southern Region (RSES) (2020-2032).

The new **Regional Spatial and Economic Strategy for 2027-2040** will set out the statutory framework for planning and economic development of the Southern Region, providing a strategy for growth, key policy objectives, and a plan for implementation and monitoring.

As part of this process, the Assembly invite stakeholders, including businesses, institutions, residents, community groups, and other public bodies to participate in the policy development process.

This Issues Paper provides information and context for the key issues to be considered as part of the review of the RSES. Its purpose is to assist discussion around what should be considered for the new RSES and encourage people to make submissions to the pre-draft consultation process. These submissions will inform the preparation of the draft RSES which is scheduled for publication in Q4 2026, at which point there will be further opportunity to respond to the proposals within the draft.

This Issues Paper is organised around the ambition of establishing the Southern Region as one of Europe's most liveable, greenest, and creative and innovative regions.

- Section 2: Focuses on creating a liveable region, addressing housing, quality of life, and placemaking.
- Section 3: Explores the transition to a green region, covering climate change, marine issues, infrastructure, and environmental protection.
- Section 4: Examines the development of a creative and innovative region, including culture, heritage, skills, economy, and 'smart' region initiatives.
- Section 5: Identifies issues associated with monitoring and implementation of the next RSES.
- Section 6: Outlines the process for making a submission.

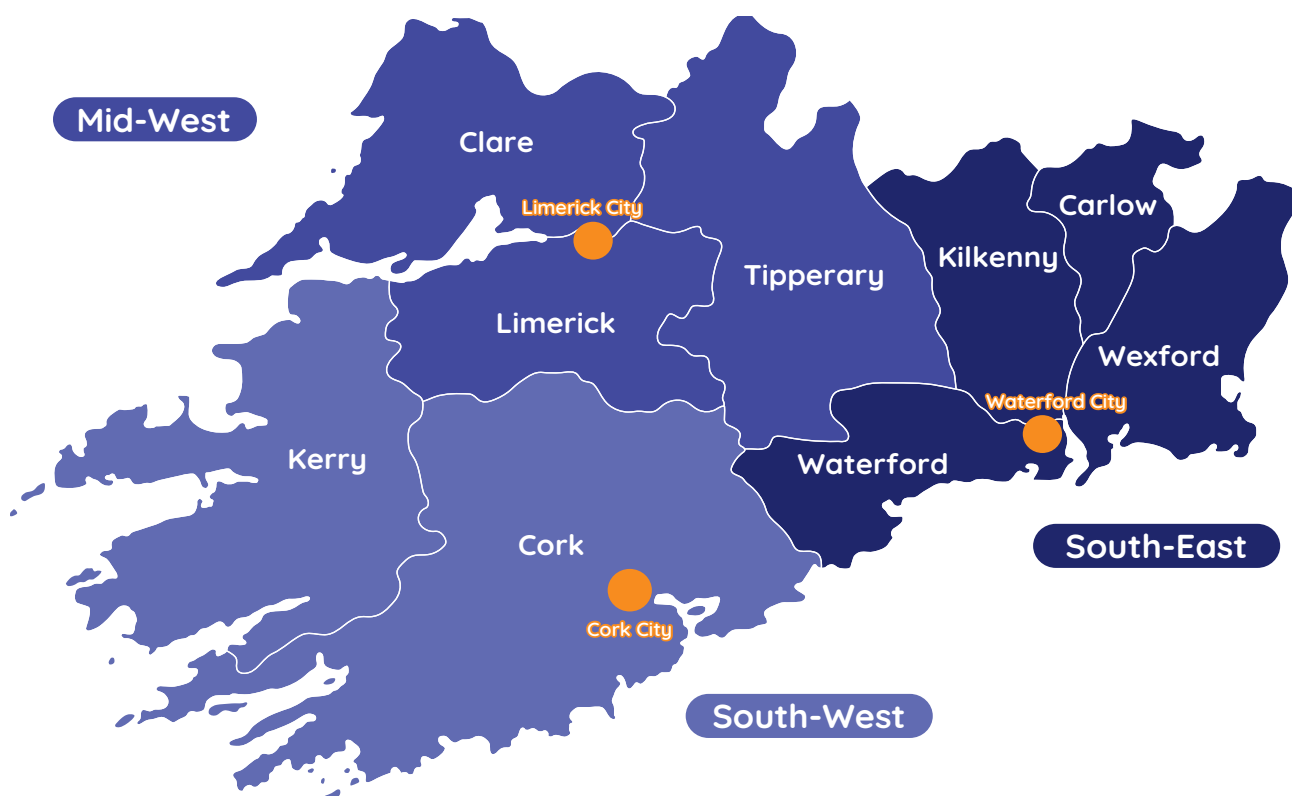
1.1 The Southern Region and the Southern Regional Assembly

The **Southern Region** consists of the administrative areas of Carlow, Cork, Clare, Kerry, Kilkenny, Tipperary and Wexford County Councils, Limerick City and County Council, Waterford City and County Council and Cork City Council. The Region covers about 42% of the total land area of the country, 33% of population (1.8 million in 2024), and 35% of national GDP in 2023.

The **Southern Regional Assembly** is a regional tier of government, consisting of elected representatives from each of our local authorities.

The Assembly works on behalf of the people of the Region. Its powers and responsibilities are set out the Local Government Act, 1991 (Regional Assemblies) (Establishment) Order, 2014 and can be summarised as follows:

- **Regional Planning** - The Assembly prepares and puts into action a RSES, explained in more detail below.
- **Managing EU Funds and Cooperation** - The Assembly oversees certain EU regional funding programmes and takes part in European cooperation projects.
- **Helping local authorities with EU work** - The Assembly provides advice, support, and coordination to local councils when they are dealing with EU institutions about local development.
- **Bringing public bodies together** - The Assembly acts as a regional platform to support effectiveness in local government and public services.



Southern Region

Figure 1: The Southern Regional Assembly Area

1.2 What is a Regional Spatial and Economic Strategy?

The RSES is the statutory long-term strategic planning and economic policy framework for the development of the Southern Region. Its purpose is to guide the physical, social, and economic growth of our communities, to support the implementation of the National Planning Framework (NPF) and the economic policies and objectives of government at a regional level. It provides the framework for each of the local authorities in the Region to develop their Development Plans and other policy documents. It is important to note that the RSES does not identify specific sites for development. Rather, it will identify strategic requirements and more detailed land use proposals will be set out in the 10 Local Authority Development Plans that will follow the RSES review.

The Planning and Development Act 2024 (as amended) sets out the required content and objectives of a RSES and some of the more significant of these include:

- Co-ordination and alignment of **population and jobs growth** at a regional level.
- Preparation of **Metropolitan Area Strategic Plans (MASPs)** for Cork, Limerick-Shannon, and Waterford.
- Strategic location of **employment-related development** and industrial and commercial development.
- Identification of **'key towns,'** and other strategic areas for future population and jobs growth.
- Identification and prioritisation of **key future economic growth.**
- **Housing locations,** as well as housing targets for local authorities.
- Setting **energy targets** across the Region and at local authority levels.

1.3 Strategic and Policy Context

The RSES sits between the national and local levels within the hierarchy of policies that shape strategic economic, social, and spatial development in the Southern Region.

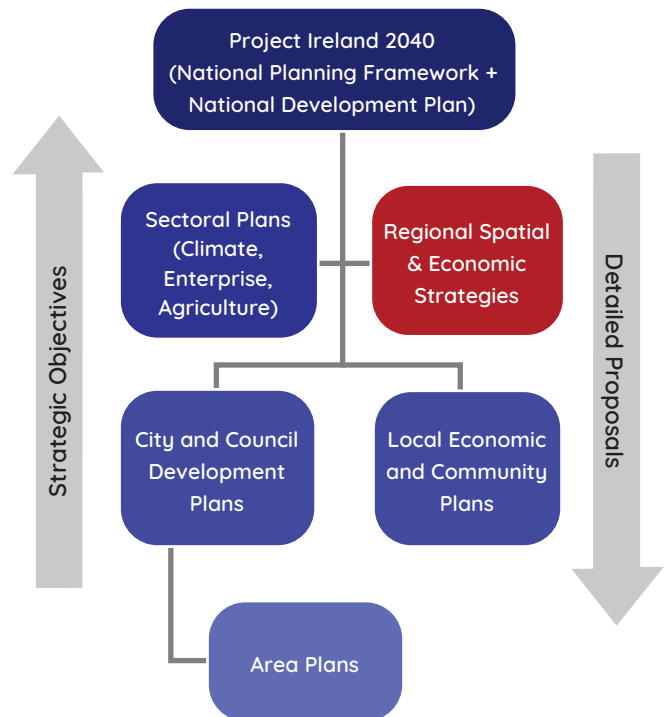


Figure 2: Policy Hierarchy

Project Ireland 2040 is the national policy framework that outlines Ireland's long-term approach to spatial development, strategic investment, and economic growth. This is comprised of two key elements:

- **The National Planning Framework (NPF):** the Government's high-level strategic plan for shaping the future growth and development of our country to the year 2040.
- **The National Development Plan (NDP):** the capital investment programme (i.e. budget allocations) that funds the infrastructure, services, and projects needed to deliver the NPF's objectives.

The overarching **NPF strategy** to accommodate growth to 2040 can be summarised under three spatial headings as follows:

- **Regional Balance** – Achieve more regionally balanced growth, split roughly 50:50 between the Eastern and Midland Region, and the rest of the Country (i.e. the Southern Region and Northern and Western Region) to include our urban and rural areas.
- **City and Regional Growth Drivers**
– To underpin the transition towards greater regional balance, target 50% of projected population and employment growth into the five Cities of Dublin, Cork, Limerick, Galway, and Waterford.
- **Compact Growth** – Target 50% of new housing growth for the five Cities and suburbs within their existing built-up footprint, and 30% of new housing growth within the existing footprint of other settlements.

Key targets for the Southern Region as outlined in the NPF are:

- Half (50%) of future population and employment growth will be focused in the existing five Cities and their suburbs with enhanced development of our towns, villages, and rural areas.
- Population growth of 330,000 people over 2022 levels to a population of just over two million by 2040 to include both rural and urban areas.
- New jobs to support the above level of population increase.
- Future population of at least 40% for the three Cities of Cork, (+96,000 people) Limerick (+44,000 people), and Waterford (+28,000 people).

Other national policies also provide a policy basis for the RSES, such as the National Marine Planning Framework, the National Transport Authority’s strategy, the National Climate Action Plan, Enterprise 2025, the Smart Specialisation Strategy, the Land Use Review, the National Action Plan on Competitiveness and Productivity, and the National Skills Strategy, Tourism for 2023.

At local level, **City and County Development Plans** are required to be consistent with the RSES.

1.4 Regional Challenges and Opportunities

The vision for the 2020-2032 RSES centred around strengthening the Region's **urban networks**, supporting more **balanced growth**, enhancing **connectivity**, improving **quality of life**, and securing sustainable **economic competitiveness**. While these objectives remain broadly relevant, changing patterns of population and employment, accelerating digital transformation, and heightened pressures on housing, infrastructure and the natural environment have inevitably changed the social and economic context.

Key **challenges** for the revised Regional Strategy to consider include:

- Housing supply, affordability, and tenure.
- Short- and long-term demographic change (e.g. in- and out- migration, workforce and public service demands, social change).
- Impact of global economic trends and trade on regional industry and employment.
- Evolving skills, knowledge, talent, and innovation to industrial change.
- Pressures on transport infrastructure, and transition towards sustainable transport.
- Exposure to climate risks (e.g. coastal erosion, flooding, energy transition).
- Land use change, environmental and biodiversity management.
- Ensuring public services and community infrastructure meet the changing needs of a diverse society.
- The need for Energy Security.

The Region has significant strengths and opportunities, including:

- Three of five key Irish cities as centres of growth, and economic corridors.
- Four of five of Ireland's tier 1 and 2 ports and two of three state airports plus a key regional airport.

- Regeneration and brownfield development potential.
- Renewable energy resources (e.g., offshore wind, solar, green hydrogen).
- Strong intellectual capital, innovation ecosystems, education, and research.
- Tourism, culture, and natural assets.
- Sustainable mobility improvements and planned infrastructure investment.
- Diverse rural economies and regional towns.

1.5 How does the RSES affect you?

The RSES is a strategic policy document, but its impact is far more personal than it may appear. The RSES shapes how our region grows—where new homes, jobs, services, and infrastructure are delivered, and how towns, cities and rural areas develop over time. This matters because it directly influences the things people experience every day: access to housing, transport choices, the vitality of town centres, the protection of our natural environment, and the strength of our local economy.

As we prepare the next RSES, public input is essential. Your views help shape a long-term strategic plan that will shape the response to local needs, supports sustainable growth, and prepares our region for future challenges such as climate change, population growth, and economic shifts.

These challenges and opportunities provide the basis for the detailed **issues explored in the following sections**.

2 Liveable Region

2.1 Creating Sustainable Communities

The Southern Region is characterised by its strong urban structure including the Cities of Cork, Limerick and Waterford and their Metropolitan Areas, Key Towns and a network of smaller towns and villages. These places support large rural catchments and shape how people live, work and access services.

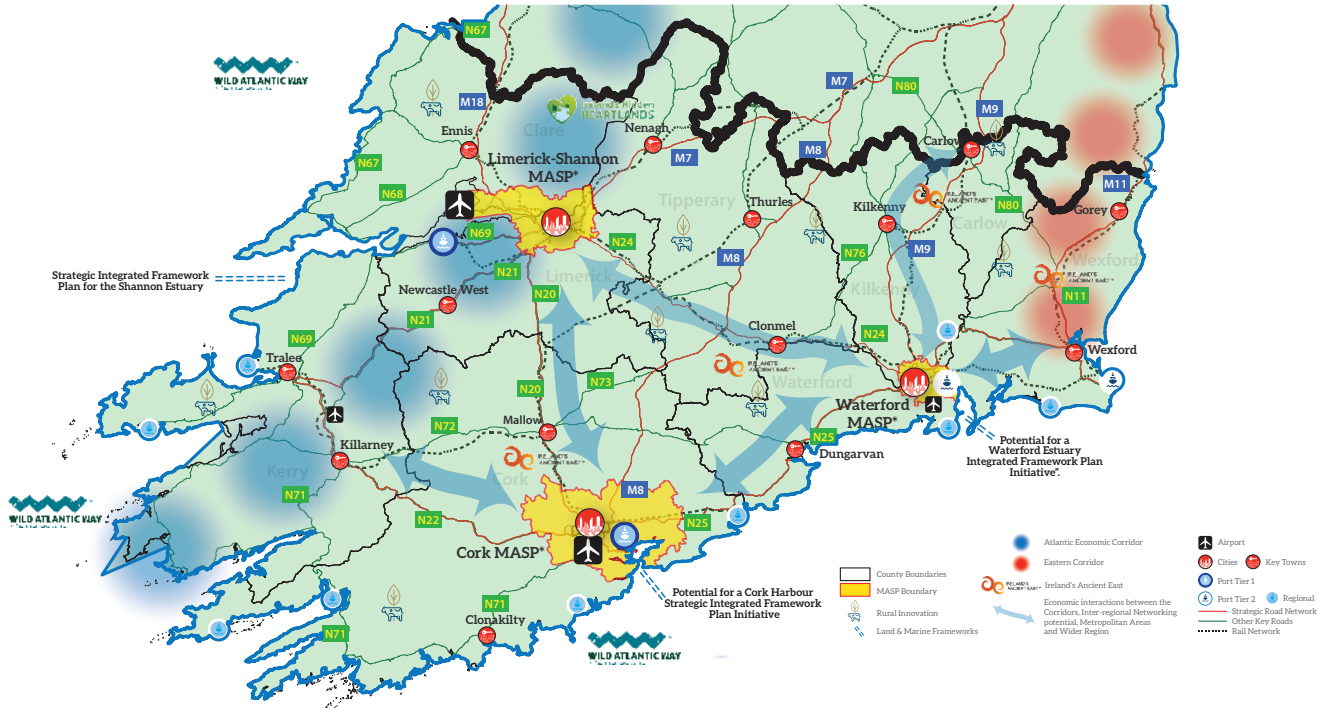


Figure 3: Current RSES Strategy Map

This map highlights the key settlements identified in the current RSES that will play a role in accommodating future population and housing growth.

The NPF sets out a target for population growth in the Southern Region of 330,000 people over 2022 levels to just over two million by 2040. National targets require the delivery of 232,900 homes from 2025 to 2040, with policy stating how the Region must create more homes to accommodate this growth and places a strong emphasis on **compact growth**, meaning that at least 40% of new homes should be built within existing urban areas, to higher densities, and making better use of brownfield land, infill sites and underused buildings, while also focusing development around high-capacity public transport.

The RSES will identify actions which promote thriving, sustainable communities, enable increased housing delivery in the Region, and help to ensure the right type of housing is delivered, in the right locations. Under the new national planning legislation, the Assembly must:

- Identify a **sustainable pattern of settlements** across the Region.
- Plan for the **integration of land use and transportation**.
- Identify **Key Towns**, which are large, economically active settlements that provide employment and services for their surrounding area.
- Where settlements cross county boundaries and are important for population and housing growth, require the preparation of a **Co-ordinated Area Plan** (e.g., Carlow Town).

It is evident that there have been significant challenges in delivering on objectives for sustainable communities and the housing necessary to meet targets to date:

Our cities are not realising their potential.
 Census 2022 figures show the population of our cities has not grown in line with the targets set out in the previous NPF and RSES.

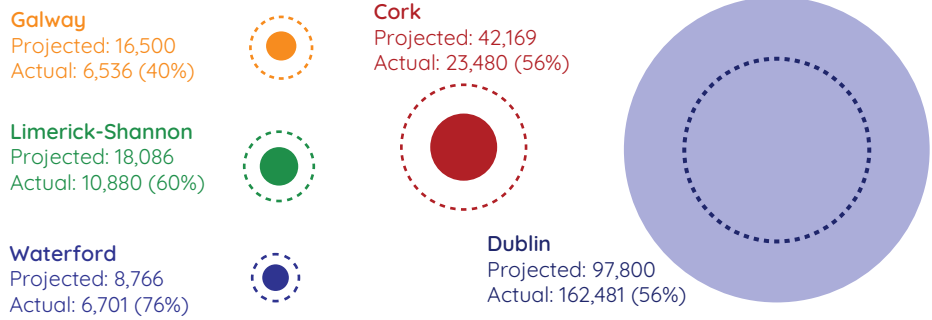


Figure 4: Projected versus Actual Population Growth of Metropolitan Areas (shown as a percentage), 2016 to 2022 (Source: CSO)

Not enough housing is being built in the right locations – Figures for housing completions, commencements and permissions granted indicate that the provision of housing in the Southern Region (South-West, Mid-West and South-East SPAs) will continue to lag behind Dublin and the Mid-East Region in the short term, with an imbalance in the rate of housing delivery versus national targets. More zoning alone will not deliver more housing and there are underlying obstacles to housing delivery in our region which need to be addressed.

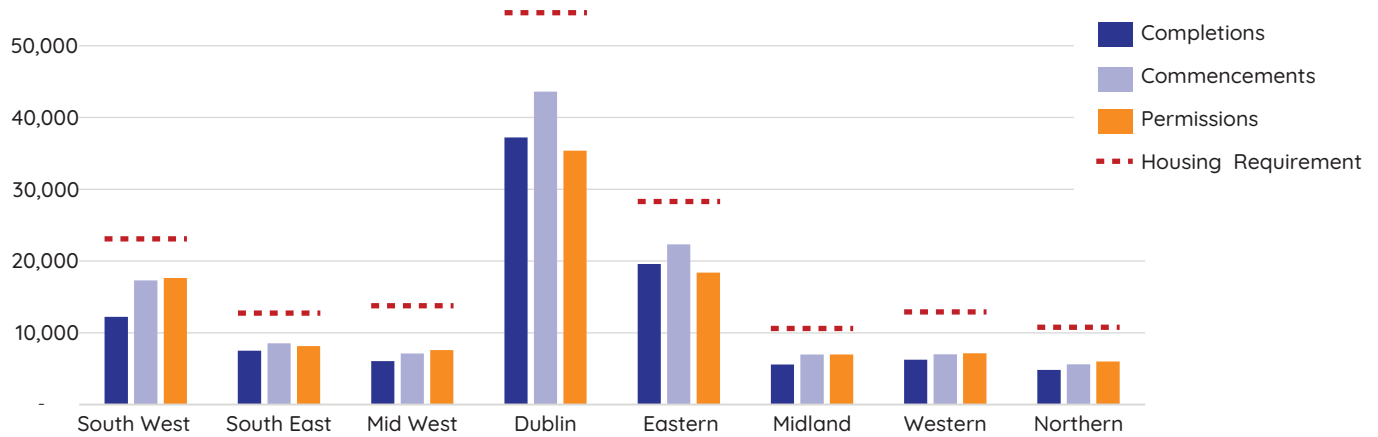


Figure 5: Housing Development Activity across SPAs, 2023-2025 (Source: CSO)

Our Towns and Villages continue to struggle.
 Dispersed housing patterns persist and there is a need for more housing in our towns and villages.

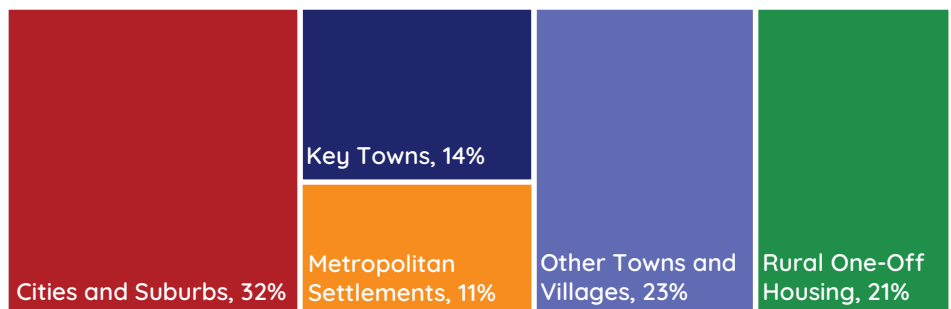


Figure 6: Housing Unit Completions by Settlement Type 2024 (Source: CSO)

2.2 Compact Growth

Compact growth means building more homes within our existing cities, towns, and villages rather than simply expanding outwards. This helps people live closer to services, reduces car dependency and makes better use of public investment.

The NPF places a renewed emphasis on the importance of **sustainable and compact growth**. The *Sustainable Residential Development and Compact Settlements Guidelines for Planning Authorities* (DHLGH, 2024) establishes how compact growth should be achieved through appropriate residential densities. The NPF also places a strong emphasis on the role of **Transport Oriented Development (TOD)** in enabling large-scale housing delivery in areas with current or planned high-capacity **public transport services**. There is also a need to target reuse of vacant and derelict sites, with the vacancy rate for the Region in 2022 being 7.9%.

Delivering compact growth can be difficult and that apartment development may need additional public support with many brownfield sites costly and complex to develop. Analysis has shown that over the years 2022 and 2023 only 11% of new homes built in the Region were apartments.

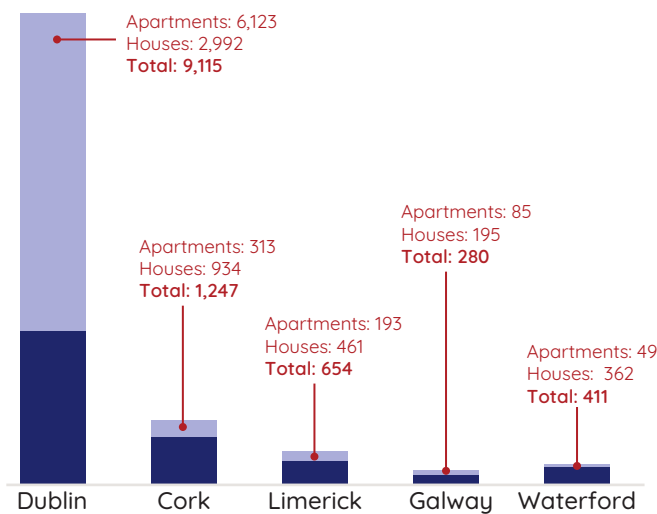


Figure 7: Housing Delivery within Cities 2024 (Source: CSO)

2.3 Quality of Life, Community and Inclusion

Improving **Quality of Life** across the Region is a core ambition of the RSES. The Strategy provides a **regional framework** to guide the provision of public services, infrastructure, and placemaking that will help create places where people want to live, work and play.

Many communities have benefited from investment in public services such as new schools, libraries, and primary healthcare centres. However, **significant challenges remain**, with persistent social deprivation in parts of both urban and rural areas. Housing shortages, homelessness, and pressure on health and other essential services are placing increasing strain on communities as the population grows.

The Assembly aims to support inclusive, healthy, and happy communities, ensuring that people have good access to services and amenities. Approaches such as the **Ten-Minute Town/15 Minute City concept**, which aims to ensure that daily services can be reached by walking, cycling or public transport, help to reduce isolation and improve overall wellbeing.

The Southern Region is a diverse region with many nationalities living in our cities, towns, and rural areas, with workers in key sectors bringing vital skills and contributing to our cultural diversity. Our older citizens contribute invaluable skills and knowledge to communities. Planning for future growth must therefore consider the **varying needs of people across all ages, backgrounds, and life stages**, including housing options, community facilities, and public services.

High-quality places, including well-designed streets, green spaces, public realm, and accessible local services, are fundamental to creating **thriving communities**. The RSES will continue to guide improvements in the design, functionality and inclusivity of our cities, towns, and villages, building on strong regional progress in recent years.

Some key **drivers for change** that will shape the vibrancy of our communities include:

- Ensuring new development is planned in a manner which gives residents easy access to local services and amenities.
- Supporting the retention and expansion of services and amenities to support our communities to grow and prosper.
- Supporting regeneration where needed to create places that are attractive to live, work, and play.
- Addressing vacancy and dereliction across the Region, particularly within the core areas of our cities, towns, and villages.
- Using a place-based approach to tailor solutions to local circumstances—Metropolitan Areas, Key Towns, small towns, villages, and rural communities—so growth supports local character, economy, and environment.



Figure 8: New Residential Development

Theme Questions

- How can future **population and housing growth** be more balanced across the Region?
- What specific challenges exist across our **Cities, Metropolitan Areas, Towns, and Rural Communities** with regards to creating sustainable communities, and how can the RSES help to address these?
- What opportunities exist for **Transport Oriented Development** and what measures are needed to unlock these areas for development?
- How can our **Key Towns** be supported to cater for future growth?
- What are the challenges facing the development of **vacant and brownfield lands** within our settlements?
- How can the RSES support the sustainable and compact growth of settlements in the Region and ensure future **places are designed to the highest quality and create vibrant communities**?
- How can the RSES best support the **creation of healthy, inclusive, and well-connected communities** across the Southern Region, ensuring that people of all ages and backgrounds can easily access the services, amenities, and public spaces they need for a high quality of life?

3 Green Region

3.1 Climate and Just Transition

Climate action, sustainability, and Just Transition are central to managing climate risk and shaping a **resilient regional economy**. The RSES will need to embed mitigation and adaptation measures to **protect communities**, infrastructure, and key sectors from climate-related shocks and **future uncertainties** as well as provide opportunities for economic development and energy security.

This will include consideration of how and where low-carbon, renewable, nature-based, and **green opportunities are located**, as well as how to mainstream sustainable growth principles into planned development of enterprise, infrastructure, and services. Both **ensuring inclusive benefits** and **avoiding negative unintended consequences** are important for Just Transition.

The RSES will also consider how to embed access to green jobs, **futureproofed skills**, and inclusive opportunities.

3.2 Environment and Energy

The RSES must set out a strategy that enables the Southern Region to respond to pressing environmental challenges while supporting low-carbon, climate-resilience and future-proofed infrastructure and communities. In addition, there is a national requirement for a secure renewable energy supply.

Energy is a core part of the Region’s low-carbon future, and the Southern Region faces challenges such as security of supply, infrastructure deficits, and supporting the move to a greater share of renewable energy. The NPF identifies that the Region has an additional power capacity allocation of 978

MW for onshore wind and 3,302 MW for Solar PV to 2030. A key function of the RSES will be to prepare a **Regional Renewable Energy Strategy (RRES)** to identify **local authority allocations** for onshore wind and solar capacity based on the NPF. The Southern Region has strong potential for renewable energy growth, which must be carefully planned to balance economic, social, and infrastructural needs in the short and long term.

The Southern Region boasts a rich, high-quality **natural environment**, with a wealth of landscapes, coastal areas, river catchments, and biodiversity that underpins our livelihoods, tourism, food production, and **quality of life**. It is important that the RSES promotes economic and social development that integrates **sustainable resource use** and **protection of the natural environment**, to safeguard these unique assets for future generations.

Measures that the RSES may consider to achieve environmental and energy targets include:

- Encouraging the bioeconomy, to utilise renewable agriculture, forestry, and marine resources to produce food, feed, materials, and energy. This will support economic development of existing sectors, employment, and waste reduction.
- Incorporating principles such as reuse, repair, and recycle, and taking a focus on the reduction of waste and environmental impacts.
- Adopting measures that encourage nature-based solutions and blue green infrastructure.
- Preparing a RSES that is in line with national objectives for a climate neutral society.

3.3 Coastal and Marine

The Southern Region's **coastline and marine area are one of our greatest assets**, supporting one of Europe's largest and most significant offshore wind resources, four of five Tier 1 and Tier 2 ports, many smaller ports, and around 40% of the Region's population living near the coast. However, challenges of climate change, rising seas, declining fish stocks, and global market shifts require planning to ensure a continued, thriving future for coastal trade, energy, and communities.

National Policy, Legislation frameworks, and governance of our marine areas have been overhauled since the adoption of the current RSES. This includes the new legislative requirements under the Planning and Development Act 2024 and Maritime Area Planning Act 2021, a new National Marine Planning Framework and associated Designated Maritime Areas Plans (DMAPs), and the establishment of the Maritime Area Regulatory Authority (MARA) to regulate development and activity in the maritime area.



Figure 9: Hook Head

The next RSES must:

- Provide for **coastal zone management** and identification of **strategic infrastructure**.
- Align with the **National Marine Planning Framework and DMAPs**.
- Provide for a strategy relating to marine and coastal matters that facilitates the **coordination of land-sea interactions** for coastal local planning authorities.
- **Support government economic policies** for the marine area.

Key **drivers for change** that will influence the new strategy include:

- Offshore Renewable Energy targets of **5GW by 2030, 20GW by 2040, 37GW by 2050**.
- The **South Coast DMAP and National DMAP**.
- Ambitious plans for the **development of key ports** in our region for trade and shipping needs, greater interconnection with Europe, delivery of offshore Renewable Energy, and renewable energy hubs.
- Designation of **30%** of Ireland's territorial waters as marine protected areas by 2030 and restoration of **all ecosystems in need of restoration** by 2050.
- Respond to an estimated sea level rise of **up to one metre by the year 2100**.
- A **world leader in sustainable food systems** including sea food.

3.4 Mobility

This RSES review is an opportunity to plan for a transport system that works for everyone and protects our environment. Two key components of this will be:

- **Regional accessibility** - linking key urban centres to their hinterlands, Dublin, and one another through high-quality transport connections.
- **Sustainable mobility** - creating sustainable travel options such as walking, cycling, and public transport.

Improved regional connections are key to unlocking economic opportunity and delivering **balanced growth**. Improved walking, cycling, and public transport networks are vital for **healthier, more attractive places**. They reduce congestion, lower emissions, and provide essential access to jobs and education, and foster public life.

The current RSES identifies **longstanding challenges**, including dispersed settlement patterns, car dependency, uneven investment, and accessibility gaps – issues reaffirmed in the NPF. In response, more ambitious national policy has been developed to reduce emissions, improve public transport and active travel, support cleaner freight movement, and expand electric vehicle infrastructure. These plans will shape how the Region plans for a more sustainable and accessible transport system.

In addition, the next RSES must:

- Identify **sustainable settlement patterns and transport** strategies.
- Include **Metropolitan Area Strategic Plans** for Cork, Limerick, and Waterford that integrate land use and transport strategies.
- Include climate change **adaptation/mitigation strategy** aligned with national policies.

- Include provision of transportation including **public transport**.
- Identify an **order of priority**, funding sources, cross-sectoral investment, and actions required to deliver planned growth.

Key **drivers for change** that will influence our transport system in the future include:

- **Growing Population** – More people living in the Region will place current transport networks under immense strain.
- **Climate and environmental goals** – National targets for a carbon neutral economy by 2050.
- **Changing ways of living and working** - More flexible and remote working patterns, accelerated since COVID 19.
- **Economic competitiveness** – Faster, more reliable regional connections are needed to reduce logistics costs, expand labour pools, and improve productivity.
- **Strengthening international connectivity** – Ports and airports play a vital role as gateways for trade, tourism and investment, and their continued development is essential to the Region’s economic strength.
- **Quality of life** - reducing congestion, increasing transport options, improving air quality, and making towns and cities more attractive and accessible.

This is not about removing cars, but about creating a transport system that is **efficient, pleasant, and sustainable for everyone**.



Figure 10: Commuter Rail, Cork

Theme Questions

- **Climate Change:** What policy changes could be made through the RSES to help mitigate and adapt to climate change, and embed circular economy principles across all sectors?
- **Energy Infrastructure:** How can the RSES provide for energy efficiency, renewable energy, and resilience of energy infrastructure in and beyond the lifespan of the strategy?
- **Environment:** What policy mechanisms and innovation can the RSES encourage to achieve nature restoration and support actions on biodiversity in the Region?
- **Marine:** What priorities should shape future coastal and marine planning to ensure climate resilience, economic growth, and sustainable resource use?
- **Mobility:** How can connectivity across the Region be improved while ensuring an efficient, accessible, safe, and sustainable transport system that reduces reliance on private cars?

4 Creative and Innovative Region

4.1 Economy

The Southern Region hosts a thriving and **diverse economy** that plays a vital role in Ireland’s national economy. In recent years, development of high-value sectors, such as pharmaceutical manufacture, technology and digital services and other advanced engineering, have helped the Region achieve one of the **highest levels of GDP per capita** in Europe. Outside specialist industries, knowledge-based services, tourism, hospitality, and a dynamic agri-food sector characterise the Region’s economy.

With the Southern Region due to grow by at least 330,000 people by 2040, significant investment will be required to scale both the **physical and knowledge infrastructure** underpinning economic activities and employment. Ensuring that the Region remains **competitive, resilient and well-connected** will be essential for sustainable economic growth, and planning to enable this will be a key component of the new RSES.

Some key **drivers for change** that will influence the new strategy include:

- **Geopolitical uncertainty** creating risks for FDI-dependent and export-focused sectors.
- Need to diversify and grow indigenous enterprises, **expanding Irish-owned exports** into global markets.
- Accelerating **digitalisation** transforming business models, productivity, and services.
- **Employment growth** and spatial targeting, with a focus on strategic locations, clustering, and balanced regional development.
- **Evolving skills** demands, including green skills and digital capabilities, requiring ongoing workforce adaptation.
- Raising productivity and innovation to enhance regional **economic resilience**, position the Region as a global leader rather than a secondary or follower enterprise location.



Figure 11: Ennis

Employment, skills, and human capital

Employment levels remain high in the Southern Region, although there are clear disparities between both employment rates and average earnings across the Region, with higher performance around the three Cities. Employment has continued to shift towards service-based sectors and is encouraging the **specialisation of skills** in line with strategies towards higher value enterprises. The Covid-19 pandemic proved to be a disruptor to traditional **working patterns and locations**, with remote and hybrid working becoming more commonplace, particularly in areas of IT, marketing, finance, and professional services.

In the 2022 census, 36.3% of the Region's population have third-level education in the Region (40% of the state's graduates), and a 22.8% have higher third level (postgraduate) degrees, reflecting the country's status as **one of the most educated countries** globally. While business, law, health, engineering, and manufacturing dominate graduate qualification areas, and the Region hosts several **leading research and innovation institutions**, ensuring competitive opportunities for graduates remains a priority to solidify innovation potential and **prevent 'brain drain'** to the capital or abroad.

With significant developments anticipated in infrastructure, housing, and employment growth it is also pressing to **address gaps in technical skills** such as engineering, logistics and healthcare, and provide opportunities for **lifelong learning** to encourage an adaptable and inclusive economy.

Productivity, competitiveness, and innovation

The Southern Region plays a **significant role in value added** enterprises to the national economy, with exceptional labour productivity figures on an EU level driven by **foreign-owned manufacturing** (pharmaceutical and chemical products) and ICT services. Irish-owned enterprise performance, however, is on par with the EU average, reflected in recent Plans from the Department of Enterprise, Trade and Employment stating the **need to increase support to domestic firms** to scale markets and diversify for national economic resilience.

EU scoreboards rate the Southern Region highly on institutions, collaboration, technological readiness, labour market, and education, but with significant weaknesses in infrastructure, market size, innovation, and Research & Development expenditure. In shaping the Region's economic future, the RSES should consider how **structural barriers** to enterprise and innovation can be reduced, including:

- Opportunities to encourage stronger integration between regional firms and international **innovation networks**.
- Improving the operating **environment for indigenous enterprises** alongside multinational firms.
- Highlighting the strategic importance of continued **public investment in applied research**, next generation technology parks, Technology Centres, and participation in major European initiatives.

4.2 Knowledge, Skills, and Capacity Building

The knowledge, skills and capacity of **individuals and institutions drive regional development** and opportunities. This is evident in the impact of and investment in Further and Higher Education institutions, Regional Skills Fora and research centres, as active partners shaping a forward-looking regional economy and society. How these institutions are connected to regional development priorities is important, as well as how research and talent is **embedded with local innovation**, and the Region's **attractiveness for investment**, entrepreneurship, and **skilled workers**.

The RSES will need to consider how **lifelong learning**, inclusive skills development and broader capacity-building can ensure that people across the Region are equipped to participate in a changing economy and civic life. This prompts reflection on how to design flexible learning pathways, widen access to upskilling, embed digital and green competences, and ensure that all people can benefit from and contribute to **inclusive regional growth**.

4.3 Smart Region

The creation of a Smart Region, Digitalisation and Smart Specialisation (S3) play a crucial role in strengthening regional development by driving innovation, improving productivity, and enabling places to harness their unique strengths in a rapidly changing economic landscape.

The RSES will need to consider how to accelerate the transition to a **Smart Southern Region** – a digitally enabled, inclusive and sustainable place where innovation and technology enhance quality of life, strengthen governance, and support balanced economic and spatial development. The goal is to ensure that digital transformation benefits **all communities**, drives **innovation and entrepreneurship**, and improves the accessibility, efficiency, and responsiveness of **public services**.

A successful approach will depend on **strengthening the Region's physical, digital and knowledge infrastructure**, ensuring that businesses, institutions, and communities have the foundations needed to adopt and benefit from new technologies. Equally important is ensuring that people experience tangible benefits, including stronger long-term employment prospects, access to **future-proofed skills**, and **inclusive opportunities** to participate in an evolving economy.



Figure 12: Killaloe/Ballina Bridge

4.4 Language, Recreation, Culture and Heritage

The Southern Region hosts three of Ireland's eight **Gaeltacht areas** (where Irish/Gaeilge are the predominant spoken language) in Counties Cork, Kerry, and Waterford, alongside Gaeltacht Service Towns and Irish Language Networks in the Region. The growth and expansion of Gaeilge as a community language, +6% between 2011 and 2022, and its wider role in the Region's **cultural and economic development** is bolstered by the work of Údarás na Gaeltachta and other organisations, which the RSES continues to support.

Leisure and recreational amenities, such as **greenways, coastal areas, parks and sports facilities**, are essential for communities, and underpin tourism and local economic activity across the Region. The RSES will need to ensure that new development protects existing recreational assets, supports the expansion of **active-travel and outdoor-amenity** networks, and improves equitable access to open space across both urban and rural areas.

The Southern Region's artistic, cultural and heritage resources shape its identity and attract communities, visitors, and investment. Safeguarding **natural, built, and**

archaeological heritage while strengthening cultural infrastructure will be central considerations for the RSES. The Strategy will support initiatives that improve public access to heritage, promote place-making, and enable community-led cultural activity, ensuring these assets are protected and enhanced as the Region evolves.

Some of the key **drivers for change** that will influence the new strategy include:

- Changing **demographics in Gaeltacht areas**, as well as the locations and interest of people in speaking and learning Irish.
- Trends in leisure and (domestic and foreign) tourism, such as towards **experiential travel, outdoor activities, and wellness**, and increased frequency of shorter-stay breaks, which have impacts on the supporting infrastructure.
- A **revived interest in Irish culture** (language, art, music), alongside recovery and evolution of cultural sectors post Covid-19 pandemic.
- Mainstreaming of **digitalisation and sustainability** within sectors, to enhance visitor experience and increase adaptability.



Figure 13: Marina Promenade

Theme Questions

- **Economy:** How can the Region best prioritise strategic infrastructure and supports to bolster indigenous innovation and ensure our business environment remains competitive and resilient?
- **Economy Spatial:** How can the Region better leverage its highly educated graduate pool to prevent ‘brain drain’ and ensure that high-value, sustainable employment is distributed more evenly across both our cities and rural areas?
- **Skills:** What actions are required to strengthen the Region’s knowledge base and ensure that people of all ages have access to the digital, green, and technical skills needed for an evolving economy?
- **Digital Transformation:** How should the RSES accelerate digitalisation across services and communities to ensure the “Smart Region” transition is inclusive and enhances quality of life for all?
- **Cultural Identity & Language:** What measures are needed to better protect and promote the Irish language (Gaeilge), our unique heritage, and the creative sectors as drivers of regional vibrancy and growth?
- **Recreation and Community Facilities:** How should the RSES plan for future provision of facilities?

5 Investment, Implementation and Monitoring

5.1 Investment

The **Updated National Development Plan 2026 – 2035** sets out an unprecedented level of infrastructure spending over the next decade of up to **€275 billion**, and Government departments have published updated spending plans in line with this increased allocation. To help drive the efficient delivery of infrastructure and maximise the benefit of NPD investment, Government have also published **Accelerating Infrastructure - Report and Action Plan** in December 2025.

The RSES will play a key role in the alignment of planned investment under the NPD with the spatial objectives of the NPF, and particularly the key objective for regional parity in future growth. As part of this, the **RSES is required to specifically identify and prioritise strategic infrastructure** of scale for the Southern Region.

Several strategic projects for the Region have been implemented or progressed to date as part of Project Ireland 2040, addressing **significant gaps in the Region's infrastructure** provision. However, the Assembly has found that capital investment has been weighted disproportionately to Dublin and the Mid-East, with critical infrastructure deficiencies even more pronounced in the Southern Region. The European Commission's Regional Competitiveness Index (RCI) finds that the Southern Region ranks in the bottom 15% of all 234 regions across the EU27.

Infrastructure provision is the Southern Regions most significant competitive weakness. Addressing these deficits is essential for the Region's economic potential, quality of life, and long-term sustainability.

5.2 Implementation

Implementation of the RSES depends strongly on actions taken by local authorities, government departments, and agencies, and therefore close collaboration during the consultation and plan-making process is essential to ensure shared ownership of the strategy and effective delivery on the ground. The absence of effective implementation structures for the current RSES has been identified as a key factor in why objectives for our Region have not been fully realised under Project Ireland 2040. The establishment of effective implementation structures, with clear roles and responsibilities for all relevant stakeholders, will be a key requirement to support the revised strategy.

5.3 Monitoring

The RSES will include a set of **Regional Policy Objectives (RPOs)** that guide what the Region aims to achieve over the lifetime of the strategy. These objectives will follow the SMART approach - **Specific, Measurable, Achievable, Relevant and Time-bound** - so that progress can be clearly tracked and reported.

In the development of RPOs, **Key Performance Indicators (KPIs)** will be identified for each RPO, to be used to assess progress on achievement of the RPO. Data used to underpin the RPOs and report on progress will be sourced from the Central Statistics Office, government departments, and agencies, as well as other trusted sources, most of which are collated and publicly available at regional and county level via the specially designed **Regional Development Monitor**.

Monitoring and evaluation of the RSES is also a core part of ensuring that the Strategy remains effective and accountable. The Assembly has a statutory requirement to prepare and submit a monitoring report to the Office of the Planning Regulator (OPR) every four years, setting out progress made on implementation of the RSES.

Theme Questions

- **Investment Gaps:** What are the main gaps or weaknesses in infrastructure provision in the Southern Region? What opportunities exist to accelerate delivery?
- **Investment Priorities:** Which sectors or strategic infrastructure projects of scale should be prioritised to support sustainable growth? How can the Strategy ensure strong engagement and genuine buy-in from implementing bodies throughout delivery and reporting?
- **Investment priorities:** What outcomes or objectives should inform how infrastructure investment is prioritised in the Southern Region?
- **RSES Implementation:** What are the critical inputs, dependencies, governance models, and/or enabling conditions needed for effective RSES implementation and successful outcomes?
- **RSES Monitoring:** What specific measures, tools and resources will be required to support consistent, meaningful progress reporting across all partners?

6 Making a Submission

The Assembly are undertaking a three-phase consultation to seek views towards reviewing the RSES (2020-2032). The diagram below set out the key consultation stages in the RSES development process.



Figure 7: RSES Development Process

Through this first phase of the consultation, views or submissions are now being sought to contribute to the development of a new RSES. Questions are posed through this paper, which aim to assist participants in compiling their contributions. However, participants are not confined to answering these questions.

This consultation will conclude at 5pm on Friday 22nd May 2026.

Local authorities, state agencies, public and private agencies, interest groups, and the public are invited to make written submissions at this first stage of the RSES process through the following methods:

The Assembly offers the following methods by which submissions can be made:

- Through the Southern Regional Assembly's dedicated online consultation portal available at: consult.southernassembly.ie.
- In writing to the following address:
**RSES Submissions,
Regional Planning Unit,
Southern Regional Assembly,
Assembly House, O'Connell Street,
Waterford X91 F8PC.**
or,
- By Email to the following address rses@southernassembly.ie.

Please make your submission by one medium only, either electronic or hard copy. All submissions must include the following:

- **Your name and details of any organisation, community group, or company you represent.**
- **An address for correspondence.**
- **Your submission on relevant planning issues for the RSES.**

Please note that submissions received may be published on the consultation website.





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