



Tionól Réigiúnach
an Deiscirt

Southern Regional
Assembly

Waterford Metropolitan Area Strategic Plan

2027 - 2040

Issues Paper

March 2026



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. It introduces the context and considerations for the new Waterford Metropolitan Area Strategic Plan (W-MASP), which will form part of the new RSES.

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

- The Regional Spatial and Economic Strategy for the Southern Region (RSES) 2027 – 2040 Issues Paper which provides an overview of the RSES review process and issues and should be read in conjunction with this paper.
- Cork Metropolitan Area Strategic Plan (C-MASP) Issues Paper.
- Limerick-Shannon Metropolitan Area Strategic Plan Issues Paper (LS-MASP).

The Waterford MASP will guide the future strategic development of the Waterford Metropolitan Area up to 2040, and includes areas administered by both Kilkenny County Council and Waterford City and County Council. The MASP must align with national government policy as set out in the revised National Planning Framework (NPF), April 2025.

Responses to the challenges and questions set out in this Issues Paper will inform the draft of the new Waterford MASP for 2027-2040 and are invited from anyone who wishes to contribute. The draft RSES and Waterford MASP is scheduled for publication in Q4 2026, at which point there will be further opportunity to respond to the proposals within the draft.

Legislative Context

The preparation of a MASP for Waterford City and its metropolitan area is required under Section 29(2) of the Planning & Development Act 2024 (as amended). The legislation indicates that the RSES shall include an integrated land-use and transportation strategy for the metropolitan area which should be consistent with the RSES. Section 29(5) of the Act states that ‘the ‘metropolitan area’ of a city means the area consisting of the city and its surrounding area approximating to the extent of its commuter zone.

In addition to the above, Section 29(13) of the Act requires that the RSES and the MASP include measures to secure the effective implementation and monitoring, including:

- Priorities for infrastructure of scale relating to transportation (including public transportation), water services, waste management, energy and communications networks and the provision of educational, healthcare, retail, cultural and recreational facilities.
- An order of priority for infrastructure provision, and potential sources of funding.
- Cross-sectoral investment and actions required to deliver planned growth and development.
- Coordination between constituent local authorities, and the cooperation of public bodies, and
- The monitoring and reporting arrangements required to measure and evaluate progress in implementing the RSES and MASPs.

What is the MASP and Why is it Important?

The Waterford MASP is a key planning framework that guides the future development of Waterford’s Metropolitan Area, including land use and transportation infrastructure up to the year 2040 and beyond. It is a statutory planning document at the regional level that must align with national planning and other policies, and local-level planning policies, such as City and County Development Plans, in turn must align their policies and objectives with the Waterford MASP.

It is a strategic document that provides the framework as to how Waterford will meet the ambitious growth targets set out in the NPF to grow by at least 50% over 2016 levels by 2040, to provide a vision and overall development approach for the city, and to enhance its potential to become a regional city of scale. The NPF sets a target for Waterford City and suburbs to increase its population by approximately 28,000 people by the year 2040 and have an overall population of at least 88,000 people.

The Waterford MASP will provide a strategy to improve infrastructure, quality of life and provide choice of housing, employment, and amenities, and address the impact of trends such as digitalisation, changing retail and working patterns.

The Story to Date - Waterford MASP (2020)

Adopted in 2020, the current and first Waterford MASP has operated for the past six years. The MASP has built on previous collaboration between Waterford City & County Council and Kilkenny County Council through the Waterford PLUTS (Planning, Land Use and Transportation Study 2004). The Waterford PLUTS set guiding principles to develop Waterford through a joined-up approach as a Concentric City on both sides of the River Suir, with these principles incorporated into the Waterford MASP.



Figure 1: Waterford Metropolitan Area Strategic Plan Map, Current RSES/MASP

Although in its initial stages of implementation, the current Waterford MASP has assisted successes in key infrastructure planning and delivery, such as:

- Compact growth and regeneration proposals.
- The commencement of infrastructure led development at brownfield, mixed-use regeneration sites such as the North Quays SDZ and construction of a new Public Transport Interchange with Sustainable Transport Bridge.
- Establishment of the South East Technical University (SETU) and support for continued expansion at the former Waterford Crystal site, and a greater presence in the City Centre.
- Continued investment in the Port of Waterford as a strategic asset of the Waterford Metropolitan Area and the Region. There is significant potential for the port to harness the potential for marine spatial planning sector and offshore renewable energy.
- Ongoing Investment in Waterford Airport infrastructure to facilitate the return of commercial passenger services to the airport.
- Bus Connects Waterford. The first phase of the BusConnects Waterford project, due to be implemented in 2026 will include network restructuring and new high-frequency routes with expanded coverage to areas like Kilbarry and Slieverue, and enhanced Sunday/early morning services to improve connectivity
- Establishment of Waterford as a UNESCO Learning City.



Figure 2: Installation of Sustainable Transport Bridge to North Quays (Source: Waterford City and County Council)

The NPF identifies the following growth enablers for the area:

- Delivering the North Quays SDZ regeneration project for integrated, sustainable development to include an integrated transport hub, the relocation of Waterford train station to a more convenient location, and a new sustainable transport bridge.
 - Identifying infill and regeneration opportunities to intensify housing and employment development throughout city centre and inner suburban areas
 - Enabling enhanced opportunities for existing communities as development and diversification occurs, particularly through employment, learning, and education support.
 - Progressing the sustainable development of new brownfield and greenfield areas for housing and the development of supporting public transport and infrastructure; Public realm and urban amenity projects, focused on streets and public spaces, particularly in the city centre and inner urban area in support of urban intensification.
 - The development and expansion of the South East Technological University (SETU) formed in 2022 from the amalgamation of the two institutes of technology in the region – Waterford IT and IT Carlow and its integration with the City and region.
- Provision of Citywide public transport in accordance with the Waterford Metropolitan Area Transport Strategy (WMATS), including the implementation of BusConnects Waterford and strategic cycleway networks.
 - Measures to enhance and better link the existing network of green and blue spaces, in line with the City and County Biodiversity Action Plan, subject to carrying out a routing study and any necessary environmental assessments.
 - Enhanced regional connectivity through improved average journey times by rail and road to Cork, Limerick and ports within the region, as identified within the All Island Strategic Rail Review.
 - Ensuring that water supply and wastewater needs are met by new strategic projects to enhance Waterford's water supply and increase wastewater treatment capacity; Improving sustainability in terms of energy, waste management and resource efficiency and water, to include district heating, water conservation, water reuse and Sustainable Drainage Systems (SuDS) and the circular economy.

Key Focus Areas

Creating Sustainable Communities

The population of the Waterford Metropolitan Area grew by 6,575 (12.3%) from 2016 to 2022, to a total of 60,079. This was a greater rate of growth than the other Metropolitan Areas outside of Dublin, driven primarily by growth of the City and Suburbs at 12.6%. Despite this, the Metropolitan Area still only experienced 76% of its projected growth under the RSES, compared to the remainder of County Waterford which experienced 195% of its projected growth. Growth has been strongest in parts of the City Centre, and to the west and south of the city, with lower growth evident to the north.

Housing Delivery has been behind targets for Waterford City and Suburbs contained in the Development Plans of both Waterford and Kilkenny, achieving only 54% of Core Strategy targets from 2023 to 2025. This contrasts with Waterford City and County as a whole, where housing delivery has been achieving 74% of targets.



Figure 3: Summerfields Housing Development (Source: Whitebox)

Data on housing commencement at a local authority level points to a recent increase in housing delivery, particularly since 2024. It is noteworthy that in January 2026, over 400 homes commenced within Waterford City and Suburbs.

Progress is noted on several strategic development sites in the Waterford Metropolitan Area, such as the North Quays Strategic Development Zone (SDZ). Kilkenny County Council is currently finalising a Development Plan Variation to enable sustainable residential development north of the river and build upon the North Quays regeneration. Elsewhere, redevelopment of the St. Otteran's Hospital Campus has the potential to deliver between 530 to 760 homes. A masterplan for the site is currently being prepared in partnership between the Council, the LDA and the HSE (Land Development Authority and Health Service Executive).

However, only two major residential planning permissions, for a total of 819 homes, have been granted recently within the Waterford Metropolitan Area under both the SHD (Strategic Housing Development) and LRD (Large-scale Residential Development) processes for large-scale residential development. While significant numbers of will come from smaller developments, the lack of planning activity for large, strategic developments represents a significant challenge to delivery of the necessary quantum of housing required to meet established housing targets in the Waterford Metropolitan Area.

While not captured in formal housing figures, student accommodation has made an important contribution to housing needs for the City's student population, and continued delivery will play a key role in addressing wider housing needs.

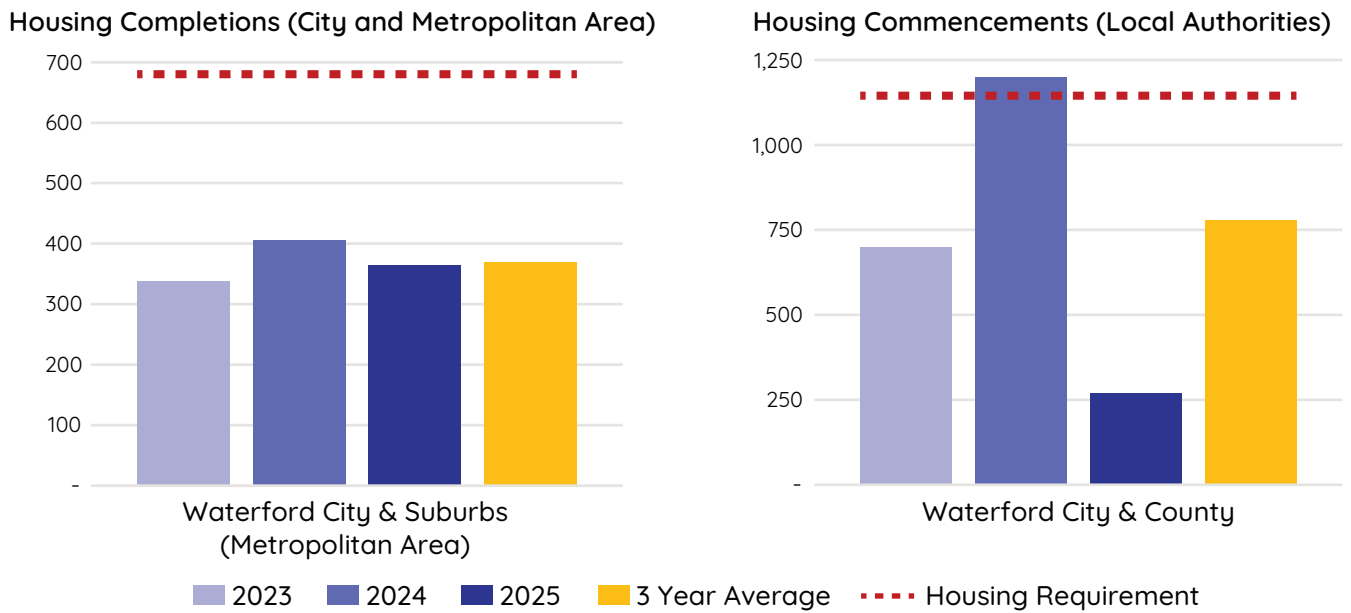


Figure 4: Housing Delivery in the Waterford Metropolitan Area 2023 to 2025 (Source: NPF Implementation Housing Growth Requirements, CSO Housing Statistics)

The NPF sets a requirement that to facilitate the ambitious growth rate for Waterford City by 2040, at least half of that growth should occur in the existing built-up footprint of Waterford City and its suburbs. There are already several key strategic sites identified in the Metropolitan Area through the Development Plan processes of both Waterford City and County and Kilkenny County Councils.

These sites include continued development of the North Quays site, significant residential lands in the Ferrybank – Belmont area to be served by the New Link Road from Abbey Road to Belmont, regeneration of the former St. Joseph’s Manor Hill site where 71 residential units are nearing completion; Acquisition of the Former Waterford Stanley Site, Bilberry was approved under URDF Call 3; An agreed LDA and HSE Masterplan for regeneration of the lands of the former St. Otteran’s Hospital; Lands at the Former Brook’s site, Newtown Road; Former Poser Seeds, Dunmore Road; and the Former Ard Ri Site, Dock Road, Ferrybank.

Creating Sustainable Communities Questions

- What measures can be taken to ensure Waterford City/suburbs and the wider Metropolitan Area can grow to be a balanced concentric city on both sides of the River Suir in a sustainable and compact manner?
- What factors should be considered when setting out the overall planning strategy for the Waterford MASP to deliver such population growth?
- How can the Waterford MASP support additional brownfield regeneration and revitalisation of suburban areas within the Metropolitan Area?

Transportation

There is a significant contrast between levels of active travel and car use within the urban core and the wider Metropolitan Area. This demonstrates the importance of housing delivery in the urban core and ensuring that new development elsewhere is based upon the principle of compact growth.

The Waterford Metropolitan Area Transport Strategy (WMATS) includes a comprehensive series of projects and interventions aimed at delivering a major modal shift including a new sustainable transport bridge and new transport interchange, are already underway. The WMATS also seeks a significant increase in cycling through a network of cycle tracks and greenways and outlines the basis for BusConnects Waterford, which will play a key role in improving public transport provision in the City.

Transportation Questions

- How can transport and land use be better aligned to deliver sustainable population growth in Waterford?
- How can Waterford's bus and cycle networks be made more user-friendly, enjoyable, and better aligned with the needs of people who live, work, study, and visit the city?
- What key transport infrastructure do you consider should be delivered in the next 10 to 20 years to enable Waterford to become a city of scale, for example additional river crossings?



Figure 5: Proposed Transport Improvements, Waterford City (Source: Waterford MATS)

Economy and Employment

The Waterford Metropolitan Area is a regional driver for economic development across the Southern Region as a whole and for the southeast. The city benefits from a growing population and strong academic-industry collaboration through the South-East Technological University and dedicated support for regional development by leading industries.

Waterford's employment base has been growing its domestic employment base achieving the third-highest net job growth rate in Ireland (5.7%) for Enterprise Ireland supported companies in 2025. Multi-national investments through Foreign Direct Investment are also present in Waterford.

Key industry sectors in Waterford include;

- **Life Sciences (Pharmaceuticals & Medical Devices)** with a major multi-national presence in the Metropolitan Area.
- **ICT and Digital Economy** – a vibrant cluster anchored by research centres like the Walton Institute at South East Technological University (SETU).
- **Advanced Manufacturing & Engineering:** Key activities include high-tech engineering and the world-renowned Waterford Crystal.
- **Financial & International Business Services:** A rapidly growing sector including banking, insurance, fintech, and shared services for global firms.
- **Tourism and Hospitality:** Tourism is driven by assets like the Waterford Greenway, the Viking Triangle, and the attractions of coastal towns like Tramore and Dungarvan.
- **Agri-Food:** This sector continues to support thousands of jobs, including the Glanbia cheese facility at Belview.



Figure 6: Belview Port



Figure 7: Winterville

There were 23,244 jobs recorded in Waterford City and Suburbs in 2022, which was a 14% increase from 2016, the highest of any city in the state. The unemployment rate of 11.7% (Census 2022) is higher than other cities but is a significant reduction from 18.8% experienced in 2016. Waterford appears to face more significant economic challenges than other economic, with a lower Jobs to Resident Worker Ratio than the other cities. However, data indicates that Waterford is well positioned to benefit from a continued increase in employment and new jobs.

Waterford City is the fifth largest city in the state and is the major centre for existing and future retail development in the South-East including higher order comparison goods.

Economy and Employment Questions

- What strengths and/or challenges/risks does Waterford face in terms of employment and economic delivery?
- How can Waterford strengthen its role as a resilient and dynamic regional economic driver for the South-East?
- How can Waterford benefit from green economy initiatives and growth areas?
- What infrastructure improvements are needed to facilitate continued expansion and diversity of Waterford's employment base?
- How can the RSES stimulate further investment in Waterford's domestic and multi-national employment base?
- What improvements would you make to Waterford's retail provision and the location of retail development?
- How can the night time economy be developed and enhanced?

Environment

The Waterford MASP will aim to integrate sustainable economic development and social development with the protection and enhance of the natural environment whilst ensuring our transition to a climate resilient society. This can be achieved through initiatives such as;

- Placemaking - Public Realm initiatives
- Continued roll out of high quality green and blue spaces to enhance Quality of Life, local biodiversity, and nature, plus benefits to people's health and wellbeing.
- Blue Green Infrastructure across the Waterford MASP area will need to be carefully considered and how such assets can be best delivered to maximise usage.
- Seek measures to reduce carbon emissions in line with the government's Climate Action Plan targets.

Environmental Questions

- How can we plan for the active and passive recreational needs of residents and visitors in terms of green and blue spaces i.e. parks, playing pitches, playgrounds and ensure they are accessible and close to home?
- What areas need to be protected or enhanced in terms of their status for biodiversity and the natural environment and other areas of local interest that may need to be enhanced or protected?
- How can we link and improve the network of green and blue spaces (green and blueways for walking and cycling etc.)?



Figure 8: Peace Park

Social and Cultural Infrastructure

The Waterford MASP will support the provision of social infrastructure such as education, health, and community facilities, to ensure that opportunities for social and cultural development as well as physical regeneration can be realised. To date, the following initiatives have been supported by the Waterford MASP;

- Following an application in 2023 Waterford became a designated UNESCO Learning City in 2024. The MASP will continue to support Waterford's development as a Learning City and seek investment in initiatives that support the Waterford Learning City Initiative.
- Support the role of Waterford as WHO Healthy City.
- Seek investment in health service infrastructure to meet its current and future population needs including the scale and range of facilities at University Hospital Waterford.

- Investments in smart technologies.
- Seek continued investment in initiatives that achieve physical, economic, social, and environmental regeneration of disadvantaged areas of the city and its metropolitan area.

Social and Cultural Questions

- What social, cultural and community (including health) infrastructure is needed to cater for the needs of the future population of the Metropolitan Area as well as larger facilities that may be needed to serve the wider South-East?
- How can we ensure that the social and community needs of all members of the community are catered for and that people do not feel excluded?



Figure 9: Theatre Royal

Making a Submission

The Southern Regional Assembly is keen to receive views on any strategic planning issue facing the city and its wider metropolitan area to inform the new Waterford MASP. We would also welcome your views on the wider RSES review itself.

We welcome your views on any or all the questions that we have set out in this Issues Paper, as well as general comments, ideas, or suggestions about matters that you feel have not been fully addressed in this paper.

This consultation will open on Thursday 26th March 2026 and conclude at 5pm on Friday 22nd May 2026.

Submissions can be made through the Southern Regional Assemblies dedicated online consultation portal available at: consult.southernassembly.ie, by email to rses@southernassembly.ie, or by post to RSES Submissions, Regional Planning Unit, Southern Regional Assembly, Assembly House, O'Connell Street, Waterford X91 F8PC.



Figure 10: Street Mural, Waterford City



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