



Tionól Réigiúnach
an Deiscirt

Southern Regional
Assembly

Submission of the Southern Regional Assembly to the Draft First Revision to the National Planning Framework

12th September 2024

OVERVIEW OF SUBMISSION

Statement of Support

The Southern Regional Assembly has an important statutory and democratic role in the implementation of Project Ireland 2040 which comprises of the National Planning Framework (NPF) and the National Development Plan (NDP) and has a strategic interest in its success. The Southern Regional Assembly strongly supports the Project Ireland 2040 process in providing the potential to address the significant spatial, societal, economic and environmental issues facing Ireland. The Southern Regional Assembly is committed to playing its role in ensuring the success of the NPF.

Overcoming ‘Business as Usual’ – The Regional Parity Approach

Fundamental to the NPF is addressing national challenges by overcoming ‘**business as usual**’ and shifting the trajectory of growth to the Dublin area to a 50:50 division between the Eastern & Midland Region and the Southern Region and the Northern & Western Region, in order to provide a sustainable basis for Ireland to develop and that all three regions together harness their potential.

The Southern Regional Assembly fundamentally supports this approach as a positive, credible, reasonable and viable proposition. The Southern Region has significant attributes to support this approach and to make it work. Ireland and the Southern Region needs a successful, attractive capital city of significance, however this will suffer without arresting the current unsustainable pressures on Dublin. We assert that overcoming ‘business as usual’ requires regional economic and infrastructure deficits to be addressed so that each region can capitalise on their potential for the benefit of the state.

Statement Of Concern:

The Southern Regional Assembly has a fundamental concern regarding the Draft First Revision to the National Planning Framework (DNPF). Whilst we are supportive of its broad approach and content, we do not consider that it provides a credible basis for the implementation of stated policy.

Our analysis of NPF¹ implementation shows significant, positive developments; a coherent alignment between national, regional, and local planning policy, significant overall state investment and significant regional and local initiatives. These achievements are fundamentally undermined by major structural and embedded geographic investment imbalances inhibiting the achievement of national targets relating to climate change, sustainable growth including balanced regional development, rural development, and the development of our Metropolitan Areas; Cork, Limerick-Shannon and Waterford.

An analysis of overall state investment per capita by region shows no change to the ‘business-as-usual’ approach and census results indicate that there is no change to

¹ Southern Regional Assembly: Two Year Monitoring Report published 2023.

the trajectory of population growth to the Dublin area. The NPF will not succeed unless these imbalances are addressed.

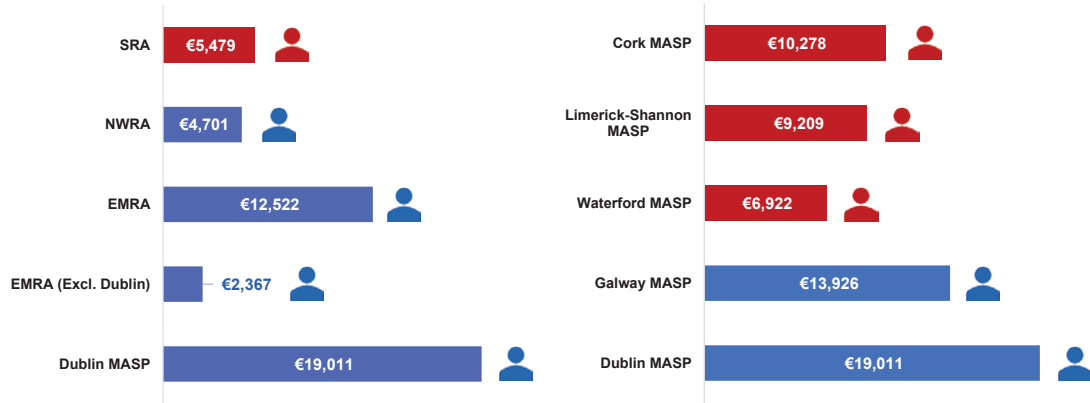


Figure 1 Planned NPD Investment - Per Capita Assessment by Region and MASP. Source: Capital Investment Tracker - SRA Analysis.

Overarching Recommendation

The First Revision to the National Planning Framework should be strengthened significantly to acknowledge and address the lack of alignment between the Regional Parity approach and the structural and funding model to achieve this objective.

INTRODUCTION

This is the submission of the Southern Regional Assembly to the Draft First Revision to the National Planning Framework (DNPF) issued by the Government on 10th July 2024. The purpose of the submission is to influence and improve the Revision for the benefit of Ireland and the Southern Region. The submission follows the following structure:

1. Context section including:
 - An explanation of the role of the Southern Regional Assembly.
 - A summary of the key challenges facing Ireland and the Southern Region.
2. Analysis and recommendations of each chapter.
3. Conclusion.
4. Appendix 1: Background Note on Key Trends and Issues
5. Appendix 2: Key Enablers For the Southern Region.

1. CONTEXT

The role of the Southern Regional Assembly.

The Southern Regional Assembly has a specific interest in the success of the NPF due to our statutory and democratic mandate for the ‘physical, economic, social, demographic, infrastructural and environmental situation of the region.’ The Regional Assembly was established in 2015 and is part of the regional tier of governance in Ireland. Covering the local authorities of Carlow, Clare, Cork City, Cork County, Kerry, Kilkenny, Limerick City and County, Tipperary, Waterford City and County and Wexford, the Assembly has the following formal functions under the Local Government Reform Act 2014:

1. The formulation, adoption, and implementation of statutory Regional Spatial and Economic Strategies. (RSES). These strategies integrate City and County Development Plans and Local Economic and Community Plans (LECPs). In 2020 the Assembly published the first RSES for the Southern Region including statutory Metropolitan Area Strategic Plans (MASPs) for Cork, Limerick-Shannon and Waterford.
2. Management of EU regional programmes; and participation in European Territorial Cooperation programmes; supporting the Irish national delegation to the Committee of the Regions; EU project participation and other EU regional-focused actions.
3. Facilitation and provision of assistance to local authorities in engaging with EU institutions on matters related to regional and local development.

4. Providing a regional platform through which national, local, and regional public bodies and other agencies can be coordinated within the context of national policy.

The work of the Assembly is overseen by 34 elected representatives nominated from the constituent local authorities, Committee of Regions representation and the Directly Elected Mayor of Limerick.

Key Challenges

Ireland and the Southern Region faces significant challenges:

- In the next 20 years our country will grow by an extra one million people to over six million people, and the Southern Region will grow by approximately 330,000 people.
- There are significant legacy issues in relation to sprawl, and past incoherent development, outdated transport provision.
- Unbalanced growth: a significant and long-established trajectory of growth to the Dublin area with major challenges to quality of life.
- A historic lack of alignment and coordination between national investment and national planning policy.
- Historic underinvestment in our cities, towns and rural areas, our transport, and our communications.
- Significant climate change challenges.
- Significant global uncertainty.

Where will our citizens live and work, how will they travel, what quality of life will they enjoy? We need a credible strategy to address these issues. In 2018 the Government embarked on the Project Ireland 2040 process combining the NPF to set the vision and strategy for the development of our country and the NDP to provide the enabling investment to implement the strategy.

The following sections will outline specific concerns of the Southern Regional Assembly, areas where we are supportive, and recommendations however the overarching recommendation of the Southern Regional Assembly is that:

The First Revision to the National Planning Framework should be strengthened significantly to acknowledge and address the lack of alignment between the Regional Parity approach and the structural and funding model to achieve this objective.

2. ANALYSIS AND RECOMMENDATIONS

This section includes analysis of the DNPF including recommendations for change, however the submission should be considered in its totality.

Chapter 1: The Vision

The Southern Regional Assembly supports the **Vision**, the emphasis on overcoming ‘business as usual,’ and a 50:50 distribution of growth between the Eastern & Midland Region and the Southern Region and the Northern & Western Region, with 75% of the growth to be outside of Dublin. We consider this approach is a positive, credible and viable proposition for the sustainable development of the state.

There is a credibility gap between this vision, the reality of the challenge and the sanguine nature of references to the NDP, for example:

The implementation of the National Planning Framework will continue to be fully supported by the Government’s investment strategy for public capital investment and investment by the State sector in general, with the National Development Plan (NDP) detailing key projects that will make our plans a reality.

The NDP currently does not coherently align with NPF policy and there is a flaw at the heart of the Project Ireland 2040 process. Our analysis and the finding of the NDP Review ‘Assessing the alignment of the National Planning Framework’² shows significant and embedded nonalignment between policy and investment.

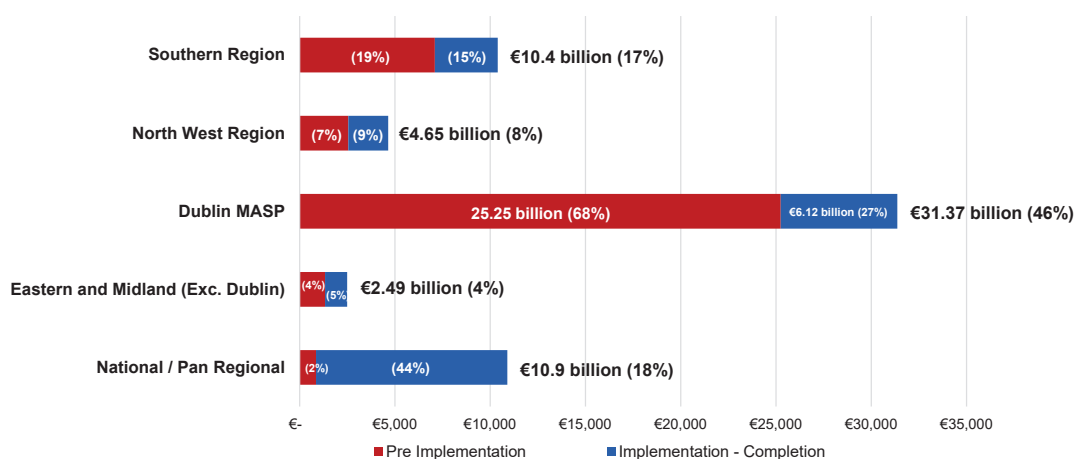


Figure 2: Share of Planned NDP Investment Across Regions. Source Capital Investment Tracker – SRA Analysis.

² Analytical note for review of National Development Plan National Investment Office the Department of Public Expenditure and Reform 2021

The Challenge Is Significant

We acknowledge that the NPF is a framework document, that successful delivery of a broad-based, long-term strategy is inherently challenging and that changing long established patterns and structures of public investment is difficult. We also acknowledge the current challenges in relation to population growth, housing, transport climate change are difficult to overcome and are on a scale not faced in the state's history.

There is a need to acknowledge the magnitude of the task ahead, the issues hindering the achievement of the vision including the significant and structural misalignment between policy and investment. The Vision should be strengthened to better reflect the recommendations of the Expert Group³ on the need for strengthening of coordination and implementation mechanisms. The National Strategic Outcomes (NSO's) do not adequately reflect the overarching regional parity approach as an 'All of State' concept and should be strengthened. The NPF should also acknowledge that Effective Regional Development requires an integrated Spatial and Economic approach.

Recommended Changes - Chapter 1

- Significantly strengthen the references to the NDP to acknowledge the misalignment between policy and investment and the need for this to change.
- The NSO's should properly reflect the regional parity approach.
- A stronger emphasis on the recommendations of the Expert Group on the need for coordination and implementation.
- A stronger emphasis on the need for integration of planning and economic development to achieve effective Regional Development.

Chapter 2 – A New Way Forward

There are significant challenges to realising the ambition and potential set out in Chapter 2:

- The analysis by the ESRI on population growth to 2040 reflects “the business as usual” scenario, with 59% of growth occurring in the Eastern and Midland Region. Most of this growth is expected to occur up to 2030.
- Planning and development data since 2022 demonstrates that new housing for most of this decade will be weighted heavily (over 60%) towards Dublin and the Mid-East.
- A lack of progress on committed projects, and a lack of commitment to projects of strategic importance, means that significant infrastructure deficiencies in the Southern Region are not likely to be addressed until the midpoint of the 2030's at the earliest. As a result, the projected share of growth by region to 2030

³ Report of Expert Group for the First Revision of the National Planning Framework, August 2023

is not realistic, with the overall targeted share of growth to 2040 significantly undermined.

- The objectives for compact growth in our cities outside of Dublin are compromised by a lack of enabling infrastructure to unlock sites and support higher densities, and a lack of viability for the market delivery of higher density developments on brownfield lands.

The introduction states that “The NPF is aligned with and supported by new and improved investment and governance arrangements.” The Southern Regional Assembly acknowledge increased overall investment and planning related reforms however the misalignment between the NPF and investment and governance arrangements is a critical weakness.

Under “Ireland Cities,” point one states, *“Supporting ambitious growth targets to enable the four cities of Cork, Limerick, Galway and Waterford to each grow by at least 50% over 2016 levels to 2040 and to enhance their significant potential to become cities of scale”*. The specific targets for the four cities set out in Chapter 4 represents a reduction of the overall share of projected national growth. In the case of Cork, the revised target is lower than the mid-range targeted identified in the original NPF. The role of Cork as an “EU Mission City” should be reflected in the DPNF and should be used as model for the other cities and towns in achieving net zero.

Trends on planning and development indicate a likelihood that imbalanced growth will continue for the remainder of the intercensal period to 2027. This aligns with the ESRI’s business as usual projections and that there is no realistic prospect of a 50:50 regional share of projected growth to 2030 without intervention.

The revision needs to be clearer on the issues which have driven and are continuing to drive the imbalanced patterns of regional growth. This includes:

- The structural dynamics of housing delivery, with major house builders and institutional investors prioritising Dublin and the Mid-East. This trend has also been reflected in early LDA investment and activity, and of overall state investment in housing.
- Lack of viability of brownfield land development, and in particular apartment led schemes. This is significantly more pronounced in our regional cities compared to Dublin, where institutional investment in the build to rent sector has delivered substantial quantities of apartments.
- A lack of commitment and progress to major infrastructure projects which are needed to enable the sustainable growth and attractiveness of the region.
- A lack of capacity in critical enabling infrastructure, primarily in water infrastructure, in a large number of small to medium sized settlements.

It is noted in paragraph 4 that “Census 2022 and other indicators highlight significant unmet demand for housing in Dublin and the Mid-Eastern Region in particular.” Evidence demonstrates that the most significant unmet demand for housing in the state has occurred in the four regional Cities. Dublin has witnessed most of both public and private institutional investment in the delivery of higher density development.

It is also clear that housing delivery in Dublin and the wider Mid-East region is a key contributor to higher population growth within that region, rather than simply a reflection of higher levels of housing demand. Indeed, our cities show strong economic and employment growth and the under delivery of housing within the Southern Region, and our cities, is the key contributor to the lower levels of population growth experienced.

If ambitions for compact growth are to be realised, then the viability challenges on brownfield land and apartment developments need to be urgently addressed. The specific viability challenges faced by our Cities, and large towns, needs to be addressed in state interventions.

Transport Oriented Development (TOD)

The Southern Regional Assembly agrees with better integration of land use and transportation planning. Long standing under investment in public transport infrastructure, means our three cities are currently poorly positioned to optimise opportunities for TOD. It is also important to highlight that the cities outside of Dublin have significantly higher levels of car dependency, while at the same time the DNPf is targeting that they grow at a faster rate than Dublin.

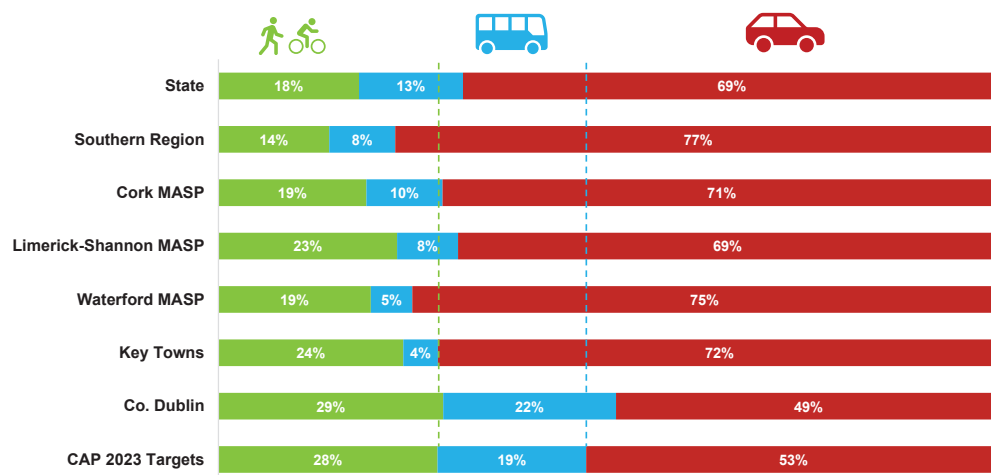


Figure 3: Modal Share of Travel to School, College, or Work 2022 (Source: Census 2022)

The NDP and DNPf include clear commitments to further improvements to Dublin’s public transport system which is necessary. In contrast, the only reference to comparable projects in our three cities is the Cork Commuter Rail Programme. There is no reference or commitment to projects identified in our MASPs and Metropolitan Area Transport Strategies (MATS), including the Cork Light Rail, the proposed commuter rail

network for the Limerick-Shannon Metropolitan area or the Waterford MATS proposals for example.

Recommended Changes - Chapter 2

- The DNPF should establish realistic regional population growth targets for the period from 2022 to 2030, to take account of growth that is effectively “locked in”.
- The document should be clearer in acknowledging the fundamental drivers behind current growth patterns, and the continued over-concentration of growth in Dublin and the Mid-East.
- There should be more coherent and effective objectives for regional parity to address the current drivers of imbalanced regional growth patterns. These objectives should focus on:
 - Addressing the alignment of infrastructure investment across regions and metropolitan areas up to 2030 to ensure that balanced regional growth is attainable post 2030. This should include the implementation of the Key Enablers identified within the RSES and the MASPS for Cork, Limerick-Shannon and Waterford.
- Ensure that appropriate implementation structures are in place, with a greater emphasis on regional and local entities to drive delivery of growth and infrastructure.
- A greater emphasis on the investment and interventions necessary to delivery compact growth in our Cities and settlements outside of Dublin.
- The DNPF should place an increased focus on the period post 2040 and recognise that that infrastructure investment and growth to be delivered up to 2040 will dictate how Ireland grows for much of the remainder of this century.
- Text within Section 2.4 should be revised to clarify that significant unmet demand is a national issue, and not only specific to Dublin and Mid-East. This section should also acknowledge the clear structural imbalances in current rates of housing delivery between the EMRA area and other Regions, and between Dublin and the other cities.
- Strengthen the reference to TOD to account for the fact that provision for TOD in our regional cities has to overcome significant infrastructure deficits and needs to be future focused rather than based on current cost benefit analysis.

Chapter 3 – Effective Regional Development

The Southern Regional Assembly broadly supports the framework set out in Chapter 3 and the recognition of the leadership role of the Regional Assemblies. A unique aspect to the RSES role is the integration of spatial and economic matters which together

with our European role in particular the ERDF co-funded Regional Programmes provides a strong platform for progress. However, the Regional Assemblies have limited powers, fewer devolved competencies and a different electoral mandate than their EU counterparts. Additionally, there is a multiplicity of regional bodies some with overlapping roles but differing boundaries resulting in a confused mandate for the Assemblies with limited agency to affect change.

The Southern Regional Assembly welcomes the reference in Section 3.1 to strengthening institutional and governance arrangements to coordinate implementation of the NPF at national, regional, and metropolitan levels. This coordination is crucial for the strategy's success. Currently, there is no structural mechanism for the coordinated delivery of regional or metropolitan priorities. Although an integrated regional investment approach was envisaged at the outset of the NPF and NDP, it has not progressed, and there is no direct linkage between the national (Project Ireland 2040 Board) and regional level regarding infrastructure spending or cross-boundary arrangements.

Section 3.4 highlights the role of cities as metropolitan drivers and the importance of wider rural towns and dispersed communities. The role of our towns, particularly larger Key Towns, should be recognised as they complement the cities and provide a similar function to regional growth centres.

The DPNF effectively addresses the issues faced by the Dublin, such as the need for increased housing within the City and improved public transport infrastructure. However, it is weaker in recognising the similar challenges faced in other cities and in its commitment to the necessary investment required to address these challenges.

It should be noted in relation to Section 3.4 that Tipperary is included within the South-East as well as the Mid-West Strategic Planning Area. In addition this Chapter and the document should correctly reference the Limerick-Shannon MASP.

Recommended Changes - Chapter 3

- Being stronger and clearer on the main challenges faced by our Region and Cities, and the measures needed to address them.
- Including a greater emphasis on the infrastructure deficiencies faced in the Southern Region and in our cities, and the need for accelerated investment to address these deficiencies. This should include a clear commitment to key projects not currently referenced in the chapter.
- Strengthen the reference to the role of the Key Towns in the Southern Region including their comparable role to that of the regional growth centres and that this role should be supported.
- The acute under delivery of housing in the Southern Region should be recognised. In particular, the importance of overcoming obstacles to the delivery of high-density housing on brownfield land, and the fact that specific measures are needed for the regional cities.

- The DNPf should correctly refer to the Limerick-Shannon MASP and Tipperary as being located in both the Mid-West and South-East SPA.
- The need for effective coordination and implementation structures particularly in our Metropolitan Areas should be recognised and addressed.

Chapter 4 - Making Stronger Urban Places

The Southern Regional Assembly welcomes the strengthening of this chapter. Section 4.2 on Ireland's Urban Structure should include a deeper analysis of the persistent "business as usual" growth patterns reflected in Census 2022 and planning and development activity. The **jobs ratio** definition used should be reviewed and clarified to include 'total resident workforce' rather than 'fixed place of work' reference.

The growth rate of the regional cities is changed from 50-60% between 2016 and 2040 in the existing NPF to 40% between 2022 and 2040 in the DNPf. By contrast, the growth rate for Dublin City and Suburbs remains at 20-25% resulting in a 2040 population target which is circa 150,000 higher than envisioned in the existing NPF.

The proposed reduction to the growth targets of regional cities undermines their role as drivers of national growth. Obstacles to the delivery of higher density development on brownfield land in our cities and large towns have been a fundamental constraint to their growth. Emphasis is needed on measures to overcome these obstacles and to retain the ambition for the Region's Cities for growth.

We welcome new text stating, '*NPO 15 also recognises the need to encourage population growth in strong employment and services centres, supported by employment growth.*' There is a need however to give due recognition and support to the role of Key Towns in the Southern Region in NPO 15.

NPO 17 retains the target of 30% or more population growth for settlements including Key Towns, however this is above 2022 population, rather than the 2016 population. There is a need to address the underlying causes of population target shortfalls in the first six years of the NPF.

The Southern Regional Assembly strongly endorses the continued emphasis on brownfield development within the built-up footprint of existing urban areas. However, market challenges have hindered the realisation of this objective in our Region. Since 2018, 93% of all apartments delivered in the five cities were in Dublin. No private apartment development of scale has commenced in our regional cities, notwithstanding significant economic growth, without public sector involvement. The chapter should recognise the significant disparity in market activity on brownfield land between Dublin and the other cities and large towns, and the need for focused interventions where the private market is not able to deliver upon this planning priority.

Recommended Changes - Chapter 4

- Retaining the ambition for regional cities. There is strong concern regarding

the downgrading of growth ambitions which undermines balanced regional development.

- Strengthening the reference to Key Towns, including in NPO 15 and the role and potential they play in the Southern Region.
- Acknowledge and address the challenges to developing on brownfield land.
- Review and clarify the definition used for Jobs Ratio.

Chapter 5 – Planning For Diverse Rural Places

The Southern Regional Assembly welcomes the policies and programmes available to support investment in rural areas, as highlighted in the DNPF including:

- The Rural Regeneration and Development Fund (RRDF),
- The Urban Regeneration and Development Fund (URDF),
- Town Centre First: A Policy Approach for Irish Towns,
- Town Centre First Heritage Revival Scheme (THRIVE),
- Ceantair Laga Árd-Riachtanais / CLÁR Programme and the Town and Village Renewal Scheme (TVRS),
- Schemes under the Croí Cónaithe Towns Fund - Vacant Property Refurbishment Grant and Ready to Build Scheme,
- LEADER, and
- The Built Heritage Investment Scheme, Historic Structure Fund, and the Community Monuments Fund.

At the same time there is a need to review the effectiveness of these schemes. Competitive bidding processes are not suited to address strategic change. Ringfenced funding for strategic projects would reduce bureaucracy and enable more effective long-term planning to the benefit of rural and urban communities.

The DNPF demonstrates continued commitment and support to rural areas, and greater acknowledgement of the diverse range of economic sectors that exist e.g. energy, marine and tourism sectors. The Southern Regional Assembly also supports the Connected Hubs initiative and recent improvements in rural public transport through the Connecting Ireland Rural Mobility Plan.

However, many rural towns and villages still suffer from elevated levels of dereliction which undermine sustainability and local economic activity. The latest Southern Regional Assembly two-year monitoring report shows that reducing the housing vacancy rate across the Region from 7.9% to 5%, could bring an additional 21,300 homes back into occupation, surpassing the total number of homes delivered during the two-year monitoring period.

Addressing vacancy and dereliction in rural towns and villages is vital for reversing population decline, combating inappropriate rural settlement patterns, and creating vibrant communities that are appealing to both current and future generations. A commitment towards re-energising our rural towns and villages is vital to addressing challenges of unsustainable settlement patterns, creating quality and liveable communities, and ensuring an adequate supply of housing stock for people.

The expansion of digital infrastructure in rural areas, through the National Broadband Plan, provides an opportunity to link Smart Specialisation principles with reference to rural innovation and business, in particular under Section 5.4 - Planning and Investment to support Rural Job Creation. The Southern Regional Assembly has developed a policy proposal 'A Regional Approach for development of a Smart Specialisation Strategy in the Southern Region' which is particularly relevant to rural areas. The DNPF should give greater emphasis to the importance of tourism in rural areas for example the Wild Atlantic Way, Irelands Ancient East and Irelands Hidden Heartlands.

Recommended Changes - Chapter 5

- The text on planning for diverse rural places should reflect the digital transformation.
- A specific NPO should be included that prioritises addressing vacancy and dereliction in rural towns and villages.
- Chapter 5 should be strengthened significantly to reflect the need for investment including by Uisce Eireann to reflect significant deficits and challenges in rural areas and villages.

Chapter 6 People, Homes, And Communities

New paragraphs addressing Sláintecare and how educational resources will be allocated are welcome. Capital investment on health, education, and public services must be strategically planned in alignment with the population targets set for each Region and Regional Cities to ensure responsive and sustainable service delivery.

We welcome the new content on Further and Higher Education and Skills, including the new technological universities, supporting the promotion of research, knowledge and innovation and the development of regional clusters as key anchors for sustainable regions. The Southern Regional Assembly in collaboration with regional leaders in education and skills has undertaken a significant initiative with the publication of: *Towards a Learning Region* which provides a basis for transformation of learning in the Region and nationally. A key success of this process has been the achievement of Waterford as a UNESCO Learning City⁴ which should be referenced in the DNPF as a good practice example.

We note the updated Priorities and Principles at Section 6.6. The reference to *Location*

⁴ <https://www.southernassembly.ie/regional-planning/learning-region>

of Homes – Addressing the long-term spatial distribution of housing should be linked to the regional parity approach and the planned and targeted growth of the Regional Cities, ensuring provision of enabling infrastructure to support the accelerated provision of housing.

Recommended Changes - Chapter 6

- Amend the text in Sections 6.2 and 6.5 to emphasise that government spending/capital investment on health, education and other public services and policies, support housing delivery should align with the regional parity approach.
- The NPF should reference the Southern Regional Assembly initiative *Towards a Learning Region*.
- The NPF should reference Waterford as a UNESCO Learning City along with Cork and Limerick.

Chapter 7 – Realising Our Island And Marine Potential

This chapter is of importance to the Southern Regional Assembly due to our strong marine economy sector with internationally significant ports and harbours, fisheries, marine and coastal tourism, and marine research and innovation centres and the significant potential for Offshore Renewable Energy (ORE). The Southern Region has four of the nation's five major ports and half of its largest fishery harbours, underscoring its national strategic significance. It is an objective of the RSES (RPO 142) that Rosslare Europort and Port of Waterford – Belview Port achieve Tier 1 status. The Southern Regional Assembly is currently completing an analysis of 'The Economic Impact of Southern Region Ports' that will provide evidence-based recommendations for contributing to growth in emerging marine sectors.

The Southern Regional Assembly supports the NSO's in Chapter 7 and recommends that ports are acknowledged as a driver for the NPF's vision for balanced regional growth. Tier 1 and 2 ports are located within proximity to our cities. There are considerable opportunities for the future growth in sustainable jobs and inward investment to regions and coastal communities in the offshore renewable energy sector, supply chain activities and new green industries with high-energy needs. The production of the first South Coast DMAPS facilitates this opportunity and there is a need to progress other DMAPS in the region to harness this potential. The opportunity for the Southern Region to achieve regional parity based on marine and ORE potential should be highlighted along with the investment in the necessary infrastructure to enable port development to harness this potential.

Recommended Changes - Chapter 7

- Emphasise the significant role of ORE in addressing imbalanced regional development and highlight the opportunity for the Southern Region as a first mover in this field.

- Reference to the need to progress DMAPs nationally and include a roadmap for their production.

Chapter 8 Working With Our Neighbours

RPO 42 Eastern Corridor, of the RSES For the Southern Region states the objective:

‘to support the development of an Eastern Corridor through the development of the Dublin Belfast Economic Corridor and strengthening economic links with the South East, extending to Rosslare Europort (incl. public transport connectivity and optimising the potential for rail freight), which is an important economic and transport link, particularly in the post-Brexit scenario.’

This is a key objective for the Southern Regional Assembly and offers a means to further promote economic ties across the island and with our neighbours and optimise transport connectivity and rail freight potential. The development of the Eastern Corridor is also an objective of the Wexford County Development Plan 2022 through the Core Strategy: ‘Objective CS06’, and Economic Development Strategy: ‘Objective ED05’ and ‘Objective ED55’.

The Southern Regional Assembly supports the Dublin Belfast corridor however as the ‘largest economic agglomeration on the island,’ it does reinforce the centralising tendency within the state. The development of this corridor concept to the South East would provide a positive and rational expansion. In a post-Brexit landscape, the expansion of the corridor to the South East has the potential to provide a national asset, enhancing regional development, and reinforcing Ireland’s strategic position within Europe on the Ten T network.

Recommended Changes - Chapter 8

- The content relating to the Dublin Belfast corridor should be amended to include reference to expanding the concept to the South East by the development of the Eastern Corridor in accordance with RPO 42 of the RSES.

Chapter 9 Climate Transition And Our Environment

We support the strengthened content at Section 9.2 to address the Climate Crisis. The additional content on Land Use Review should be strengthened by the inclusion of a NPO.

We note the additional responsibilities for the Regional Assemblies to agree targets for renewable energy per local authority area. There is an urgent need for production of relevant guidelines for land based renewable energy to facilitate the process and also to assist local authorities.

We support the additional focus in Section 9.3 on *Protecting, Conserving and Enhancing our Natural Capital* including the updated paragraph on *Water Resource Management and Flooding*, stating that *statutory regional spatial and economic strategies and development plans must ensure the integration of sustainable water management considerations*. We further support the *Core Objectives including prioritising nature-based solutions to manage water in terms of both quantity and quality and promote climate change mitigation strategies*. The *Blue Green Infrastructure (BGI) and Nature-based Solutions (NbS) Framework established by the Southern Regional Assembly is a pioneering initiative*.⁵ The Framework provides a resource for Local Authorities, decision makers and developers to guide the implementation of BGI and NbS and should be used as a model nationally. The new text and additional NPOs are also welcomed, including the important link made on page 140 between the planned accelerated growth of regions and metropolitan areas and the receiving environment.

Recommended Changes - Chapter 9

- Amend NPO 82 to state that actions relating to greenbelts and green and blue spaces at regional, city and local scales should be supported with increased funding for BGI and NBS to prevent coalescence of settlements and to allow for the long-term strategic expansion of urban areas.
- This section should include a reference to the Blue Green Infrastructure (BGI) and Nature-based Solutions (NbS) Framework established by the Southern Regional Assembly is a Case Study/Best Practice Example.
- The inclusion of a NPO relating to the Land Use Review.
- A roadmap of timescale for guidance on renewable energy should be included.

Chapter 10 – Implementing The National Planning Framework

The opening statement to Chapter 10 is significant:

The success of the National Planning Framework depends on its policy reflection and programme delivery at national, regional, and local level. Implementation of the Framework will therefore be combined with streamlined governance arrangements and focused public capital investment priorities.

The Southern Regional Assembly strongly endorses this ambition. NPO 74 in the existing NPF is clear on the importance of aligning infrastructure investment with planned growth. This text has been removed from the DNPF. Instead, the corresponding NPO 103 indicates that alignment has been achieved, and that the objective should be to “continue to ensure” that alignment continues.

Analysis undertaken by the Southern Regional Assembly challenges this assumption

⁵ https://www.southernassembly.ie/uploads/general-files/BGC_Framework_web.pdf

and highlights a major discrepancy between the geographic distribution of planned capital investment under the NDP, and the objective for regional parity. There are signs of a shift away from the regional parity approach to major projects as compared to the early stages of the NPF.

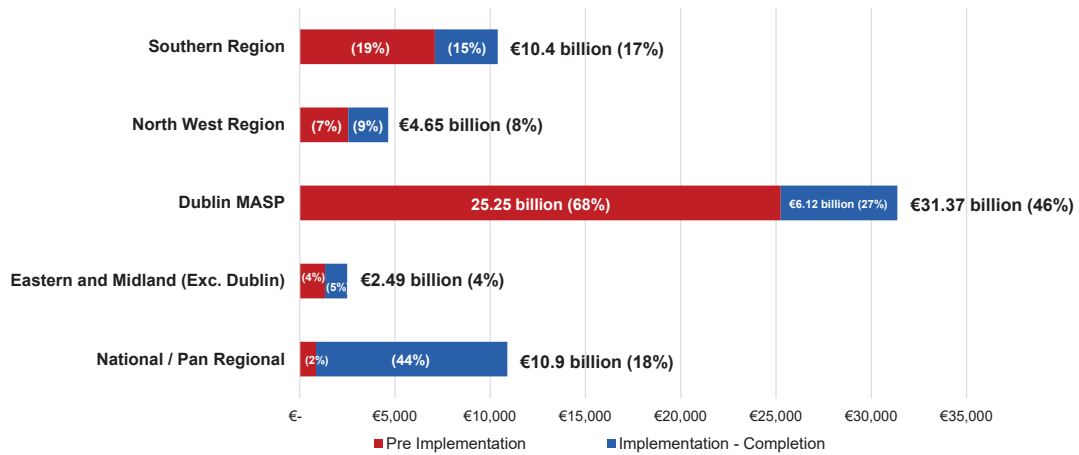


Figure 4: Share of Planned NDP Investment Across Regions. Source: Capital Investment Tracker, SRA Analysis.

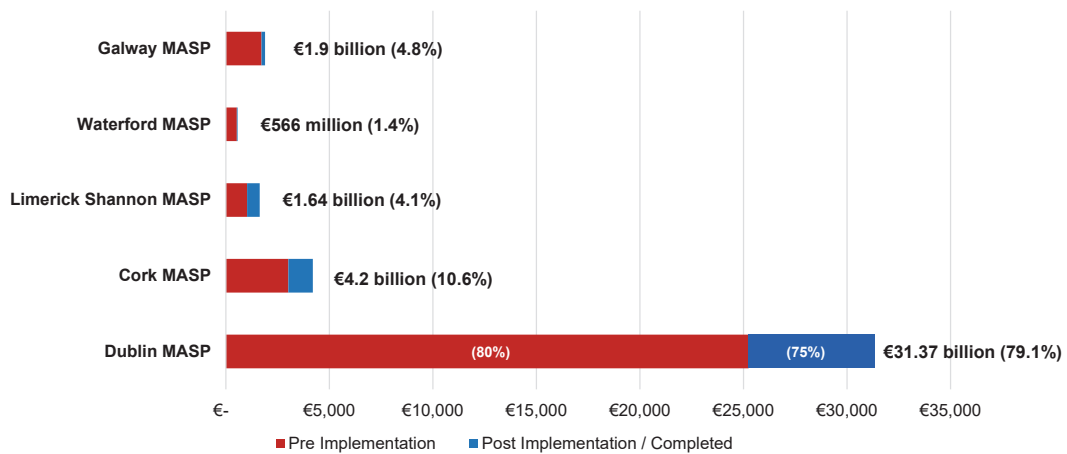


Figure 5: Share of Planned NDP Investment Across Metropolitan Areas. Source: Capital Investment Tracker, SRA Analysis.

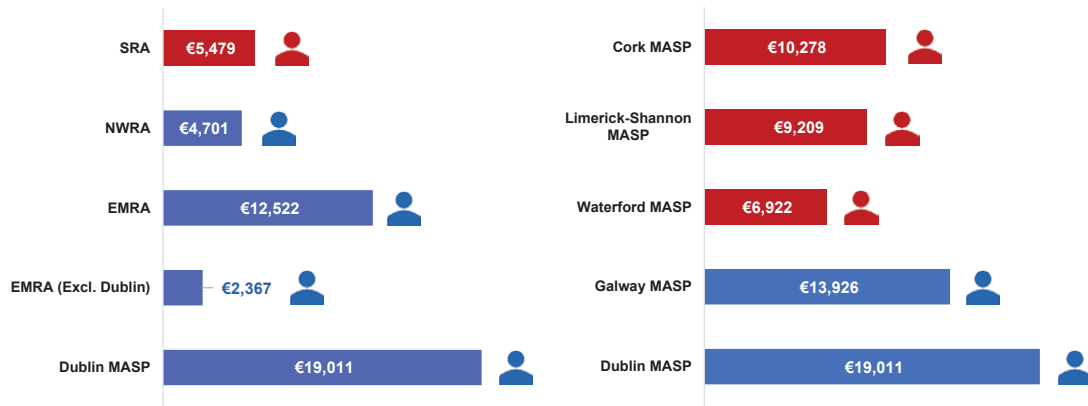


Figure 6: Planned NPD Investment – Per Capita Assessment by Region and MASP. Source: Capital Investment Tracker, SRA Analysis.

The targets for the Southern Region, and for our Metropolitan Areas are not attainable without an urgent rebalancing of the regional distribution of planned investment. The outcome of current planned infrastructure investment is an increased focus of growth and economic development on Dublin and the wider Mid East, and poorer outcomes for Dublin, the Southern Region and nationally. This is notwithstanding the clear positive potential and opportunity for the Southern Region; the Metropolitan Areas of Cork, Limerick- Shannon and Waterford; and towns, villages and rural areas to play a proactive role in achieving national outcomes for the benefit of the state.

The disparity in planned investment has meant that several projects of critical importance to the sustainable growth and economic development of our region and metropolitan areas are not currently included within the NDP, and not referenced within the NPF. This includes, though is not limited to:

- Cork Light Rail,
- Limerick-Shannon Commuter Rail,
- Upgrades to the rail network to significantly improve regional rail connectivity between major urban centres within the region and to the other regions,
- Several road projects of strategic importance in improving inter urban connectivity across the region, particularly between our Cities and Key Towns, and to facilitate growth within metropolitan areas.

These projects will not be delivered before 2030, by which point most of the embedded growth will have occurred. Unless they are included within the forthcoming review of the NDP, they will not be delivered until the later period of Project Ireland 2040 and the potential of the Southern Region will be squandered. There is a need for the NPF to support the Key Enablers identified in the RSES and MASPs for Cork, Limerick-Shannon and Waterford.

The NPF project will fail unless this issue is addressed. The growth targets for the Southern Region, and for our Metropolitan Areas in particular, are not attainable without an urgent rebalancing of the regional distribution of planned investment. The outcome of the current planned infrastructure investment is an increased focus of growth and economic development on Dublin and the wider Mid East, over and above even the ‘business-as-usual’ scenario presented by the ESRI and squanders the opportunity presented by the Southern Region to play its part in addressing national challenges.

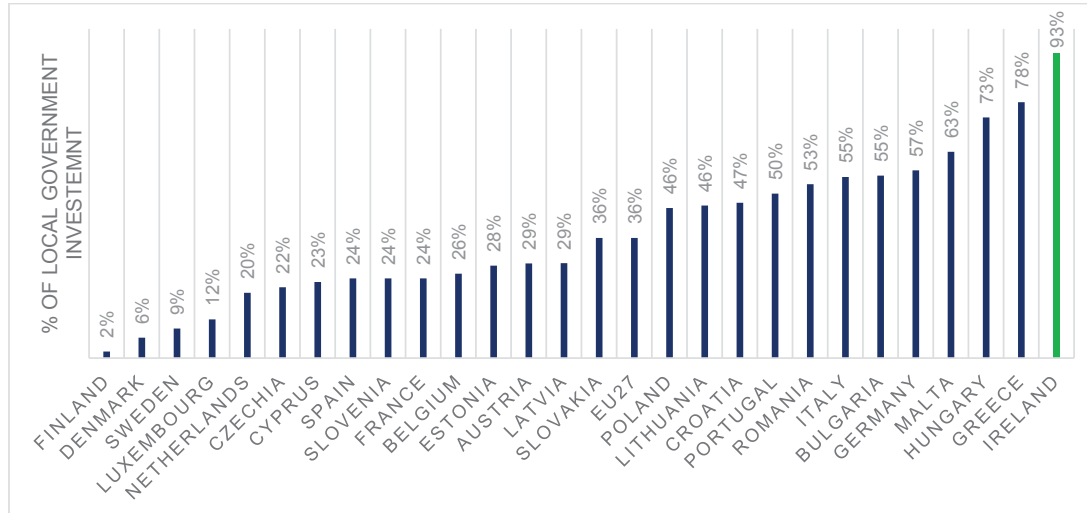
Structural Reform

The Southern Regional Assembly strongly endorses the recommendations of the OECD Report “*Towards Balanced Regional Attractiveness in Ireland: Enhancing the Delivery of the National Planning Framework.*” The highly centralised nature of Irish governance is widely recognised. It is specifically addressed by the OECD report which notes that:

Ireland is highly centralised and fast growing, creating coordination challenges in terms of delivering key investments and in key policy areas like transport, housing, education, among others. Actors across levels of Government recognise a need for a more coordinated approach to the delivery of the National Planning Framework (NPF), the principal spatial planning strategy of Project Ireland 2040, which includes the NPF, and the National Development Plan (public investment strategy). Notably, the NPF forecasts population growth of 1 million people by 2040 with much of that growth anticipated in regional cities. It is often argued that the relative size of Ireland translates into effective central coordination of attractiveness policies. However, Ireland’s small population does not preclude having an empowered subnational level of Government. Indeed, the challenges currently high on the policy agenda (e.g., housing, climate, transport) are likely to grow as the population grows and spreads. Subnational governments are, and need to be, a key part of the solutions, but they lack the resources and mechanisms to deliver on national plans and policies.

We consider that implementation of many of the report’s recommendations, particularly those relating to adopting revised governance arrangements strengthening the role of regional and local institutions, are critical to (rather than just relevant to) the successful implementation of the NPF’s objectives. The importance of this report is not given sufficient prominence in the DNPF.

Ireland's local (county) governments rely more on capital transfers for public investment than any EU member state



Note: It is to be noted that in few cases, capital transfers may account for asset transfers to local governments rather than being directed towards local government investment.
Source: (OECD, 2023, forthcoming^[45])

Figure 7: Capital Transfers for Public Investment in EU – Source OECD

Recommended Changes - Chapter 10

The Southern Regional Assembly considers it essential that the NPF clearly acknowledges the current misalignment between planned growth and planned investment. This should include:

- The text removed from current version of the NPF stressing the importance of infrastructure investment in enabling regionally balanced economic growth should be reinstated.
- An acknowledgement that the alignment of planned investment and objectives for regional parity has not been achieved to date, and that this has a direct influence on continued focus of growth on Dublin and the Mid-East and undermines the clear opportunity presented by the Southern Region impact on achievement of national policy.
- There is a need for more robust arrangements for monitoring the alignment of planned infrastructure investment under the NDP with objectives of the NPF. This should be the need to account for the projected cost of projects based on most readily available estimates.
- A clear mechanism should be applied to ensure sectoral investment is weighted in favour of achieving NPO2 and that population and employment growth in the Southern Region and the Northern & Western Region should at least match that of the Eastern and Midland Region (the 50:50 split).
- Competitive bids should not be a primary source for funding the strategic

change sought through the NPF. Funding mechanisms should be reformed to achieve the change required. Local Authorities need to be assisted to deliver on City and County Development Plan objectives and Core Strategies, especially the delivery of housing and employment targets aligned with national and regional projections and objectives.

- The establishment of a dedicated long-term financing mechanism (10-year strategic fund for local authorities) to drive the achievement of the accelerated growth of Metropolitan Areas, funding support for Key Towns, towns and rural areas and other strategic objectives. Local Authorities should no longer be made to compete against each other for access to scarce funding to advance national and regional objectives. A fairer and more targeted funding model is required. Such funding should, in the first instance, be devolved to the local authority level, but a regional mechanism is also required where cross-boundary and regional issues apply.
- There should be a more effective delivery mechanism to advance the development of metropolitan areas in accordance with national policy. Structural mechanisms for delivery of required mechanisms for implementation should be included as an NPO.
- There is concern at the multiplicity of regional bodies with differing boundaries which does not facilitate a coordinated approach between the national, regional and local levels.
- The recommendations of the OECD Report “*Towards Balanced Regional Attractiveness in Ireland: Enhancing the Delivery of the National Planning Framework.*” should be given greater prominence and consideration in the NPF.
- The wording of NPO 92 should be revised to note that MASPs for all cities, rather than just Cork and Dublin, may address the wider the city region.
- Support for the Key Enablers identified in the RSES and MASPs for Cork, Limerick- Shannon and Waterford.

Planning

- The Urban Development Zones (UDZs) should be used as a mechanism to deliver prioritised investment in the Regional Cities / Metropolitan Areas of the Southern Region.
- There should be a general assumption that any areas of significant growth, which will require significant public investment in enabling infrastructure, will be designated as Urban Development Zones (UDZs), and that UDZs will be prioritised for investment ahead of lands which have not been designated. To support this, the designation of UDZs should be underpinned by dedicated funding programmes, potentially linked to the URDF. (NPO96)
- With the increased timeframe of Development Plans from six to ten years it may be appropriate for planning authorities, as part of the standardised tiered

approach to identify where sites are projected to be delivered within year 1 to 5, and years 6 to 10. (NPO 97)

- NPOs 98 to 101 should be revised to provide dedicated support for development of brownfield land and address fundamental challenges of financial viability of brownfield land and apartment delivery - issues which are more pronounced in our urban areas outside of Dublin. Policy and supporting mechanisms that will enable the higher density development of Brownfield lands will assist in promoting Compact Growth and Growing the Regions.

3. CONCLUSION

The Southern Regional Assembly strongly supports the Project Ireland 2040 process in providing the potential to address the significant spatial, societal, economic and environmental issues facing Ireland. The Southern Regional Assembly is committed to playing its role in ensuring the success of the NPF.

The Southern Regional Assembly supports NPO2 and overcoming ‘business as usual’ as a positive, credible, reasonable, and viable proposition. The Southern Region has significant attributes to support this approach and to make it work. Ireland and the Southern Region needs a successful attractive capital city of significance, however this will suffer without arresting the current unsustainable pressures on Dublin. and we support the development of all three regions. We assert that overcoming ‘business as usual’ requires regional, economic and infrastructure deficits to be addressed so that each region can capitalise on its potential for the benefit of the state.

The Southern Regional Assembly has a fundamental concern regarding the Draft First Revision to the National Planning Framework (DNPF) and we do not consider that it currently provides a credible basis for the implementation of stated policy. Major structural and embedded geographic investment imbalances shows no change to the ‘business-as-usual’ approach and census results indicate that there is no change to the trajectory of population growth in the Dublin area. This inhibits the achievement of national targets relating to climate change, sustainable growth and squanders the potential of the Southern Region: our Metropolitan Areas of Cork, Limerick-Shannon and Waterford; and our towns, villages and rural areas to play our part in assisting national change.

The NPF will not succeed unless these issues are addressed and our overarching recommendation is that:

The First Revision to the National Planning Framework should be strengthened significantly to acknowledge and address the lack of alignment between the Regional Parity approach and the structural and funding model to achieve this objective.



Tionól Réigiúnach
an Deiscirt
Southern Regional
Assembly

Appendix A

Background Note on Key Trends and Issues

12th September 2024

Section 1: Introduction

This paper has been prepared as an Appendix to the Southern Regional Assembly's response to the public consultation on the First Draft Revision to the National Planning Framework. Its purpose is to support the Regional Assembly's core submission by setting out the detailed analysis which underpins the key concerns highlighted, and the recommendations which have been put forward.

The Paper covers the following core topics:

- Revisions to population targets within the Draft NPF when compared to the current 2018 NPF.
- Distribution of population growth within the State and Region from 2016 to 2022
- Housing delivery, and trends evident from planning and development activity within the State and the Region.
- Trends in employment and commuting.
- Regional distribution of planned capital investment under National Development Plan 2021-2030 and its alignment with objectives of the NPF, particularly with regards to Regional Parity and planned growth.

The analysis included within this paper has largely been informed by the Southern Regional Assembly's Two-Year Monitoring Report for the 2022-24 period.

Section 2: Analysis of Revised Population Targets in Draft NPF

This section assesses changes in the population targets within the Draft NPF 2024 when compared to the Current NPF 2018.

Please note that where population targets for Regions or Cities have been set as a range in either the 2018 NPF or the Draft FRNPF, the mid-range figure has formed the basis of analysis.

Population projections within the Draft First Revision to the National Planning Framework (DNPF) are based on revised research undertaken the ESRI, which itself was undertaken on foot of the results of Census 2022.

The 2018 NPF projected an overall national population of 5.85 million by 2040. The ESRI revised mid range projection, on which the Draft FRNPF is based, is that the population will reach 5.7 million by 2030, and to 6.1 million by 2040. The key implications of this are:

- An additional population of at least 250,000 to be planned for above that envisioned in the 2018 NPF.
- A greater proportion of that growth occurring up to 2030 than envisioned in the 2018 NPF.

The ESRI have also noted scenarios for lower and higher net migration, though the core figures within the NPF are based on the mid-range scenario.

Projected Share of Growth by Region

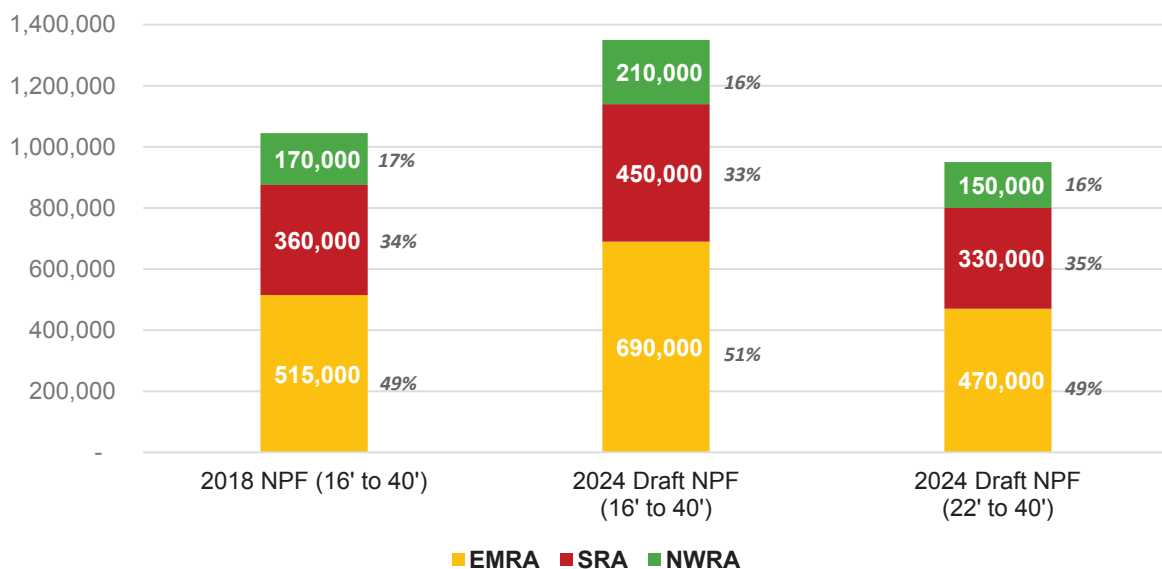


Figure 1: Projected Share of Growth by Region, 2018 NPF to 2024 Draft NPF

The planned distribution of growth from 2022 to 2040 is broadly in line with the targeted share of growth in the existing NPF and the “50:50 split” which underpins the overarching objective for regional parity. There’s a noticeable, though small, increase in EMRA’s share of growth for the 2016 to 2040 period (51%, up from 49%), with a 1% reduction for each of the SRA and NWRA. This reflects the effective “resetting” of targets to begin from 2022, and the

fact that the EMRA region saw a higher rate of growth (9.1%) than the Southern (7.4%) and Northern and Western (6.8%) regions between 2016 to 2022. To achieve NPF objectives for balanced regional growth and “regional parity” each region should be growing at generally the same rate.

It should be noted that the research undertaken by the ESRI which has been used to inform the national population projection to 2040 included projections on geographic distribution. The ESRI project that 59% of the growth will occur in the Eastern and Midlands Region, 28% in the Southern Region and 13% in the Northern and Western Region. This compares to 49%, 35% and 16% respectively in the Draft NPF.

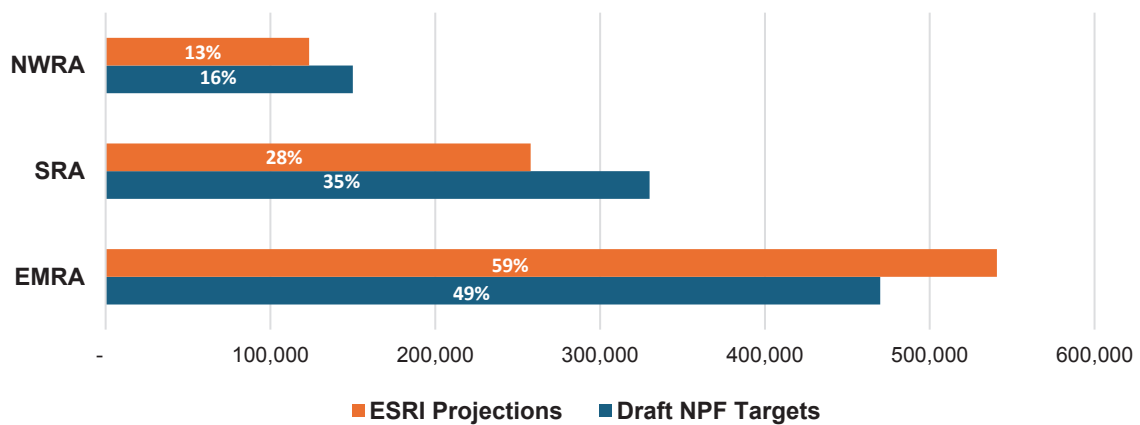


Figure 2: Share of population growth 2022 to 2040, Draft NPF Targets V ESRI Projections

The ESRI projections essentially reflect the “business as usual” scenario, are primarily based on trends for internal migration witnessed since 2011 and are consistent with the share of growth by region from 2011 to 2022. It should be noted however that the 2011 to 2016 period saw a significantly heavier weighting of growth towards the EMRA region (69%) than the more recent 2016 to 2022 period (55%). The 2011 to 2016 period was one which saw a much earlier and stronger economic recovery in Dublin than other parts of the country, which had a major impact on net internal migration.

Ultimately, it is important to note that the targeted share of growth within the DPNP is a target based policy to achieve a more sustainable and equitable outcome, rather than an actual projection of how growth will occur.

Projected Growth of Cities

There’s a more significant change in the growth targets for Cities. In the existing NPF, Dublin’s growth was projected to be just above that of the other four Cities combined. When accounting for growth from 2016 to 2040, Dublin is now projected to grow by 386,000 from 2016 to 2040, an increase of 120,000 from that projected in the existing NPF. By comparison, the four Cities combined are now projected to grow by 238,000 over the same period, a decrease of 2,350 of the growth projected in the existing NPF.

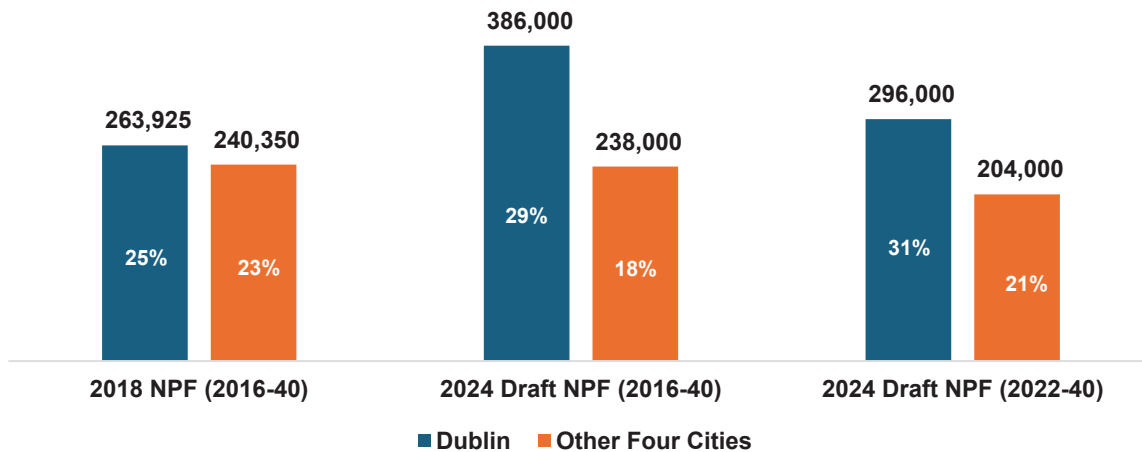


Figure 3: Share of population growth for Dublin and the other Four Cities

The 2018 NPF envisioned that Dublin would deliver 25% of overall national growth to 2040, while the other Cities combined would deliver 23% of overall growth. In the DNPF, Dublin is envisioned to deliver 31% of the State’s growth from 2022 to 2040, with the other Cities delivering 21%. For the 2016 to 2040 timeframe, Dublin is targeted to deliver 29% of overall growth, and other Cities 18%.

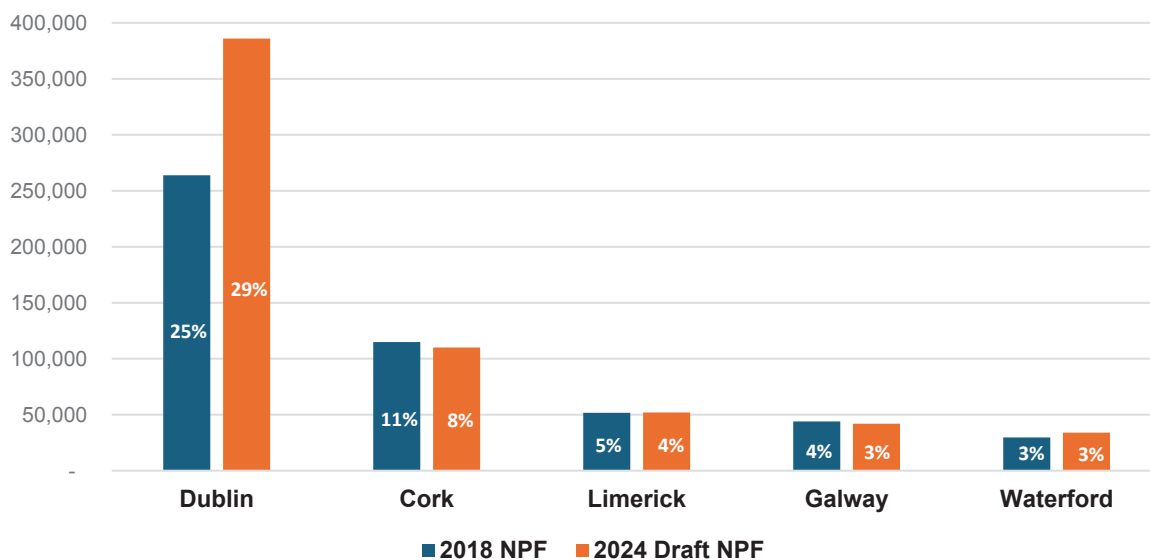


Figure 4: Targeted Population Increase by City, 2016 to 2040

Within the four Cities, Cork’s targeted growth for 2040 is actually c 4,000 lower in the DNPF than in the 2018 NPF, and it’s share of national growth has reduced from 11% to 8%. Limerick’s target is broadly similar, though it’s share of national growth has reduced to 4%. Waterford’s target has increased by c 4,000. Galway’s target has reduced by c 2,000.

The reason for variance in increases or decreases in targets across the four cities is related to their growth from 2016 to 2022, and the fact that each have allocated a 40% growth target from 2022. It should be noted that while the 2018 NPF set a range of growth between 50% to 60% from 2016 to 2040, the Draft FRNPF sets only a “minimum” target of 40% growth from 2022 to 2040.

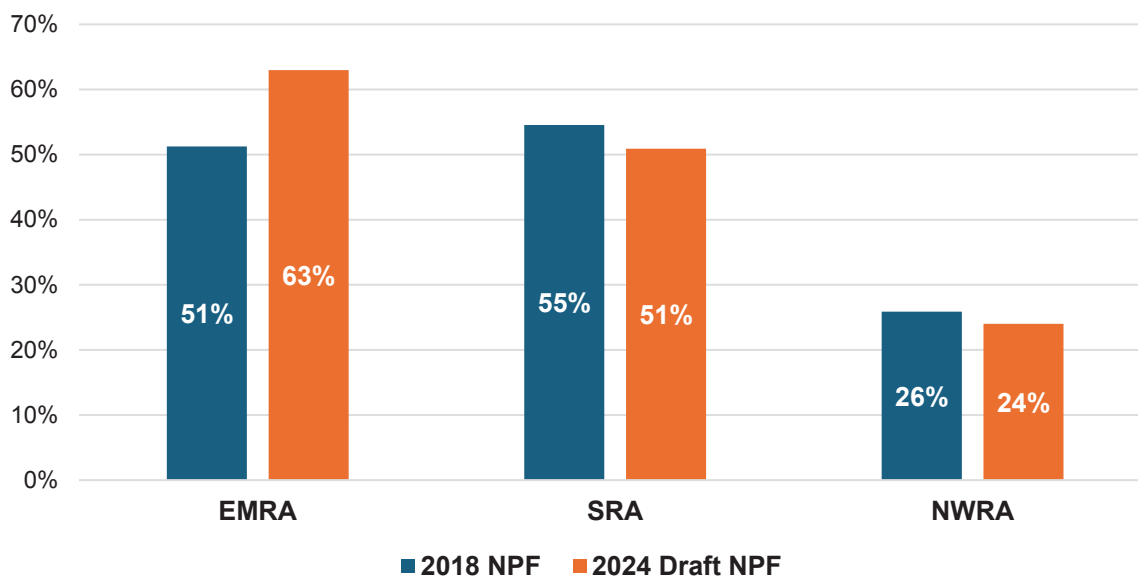


Figure 5: Proportion of growth within Regions planned for Cities

When Cities are considered within their Regional context, Dublin is projected to take a significantly higher share of EMRA’s overall growth than was envisioned in the 2018 NPF (63%, up from 51%). By comparison, in the Southern Region our three Cities are projected to deliver 51% of the Region’s overall growth, down from 55% in the 2018 NPF.

General Comments

Contrast of DNPf Population Share Projections and the ESRI Research

Despite the fact that regional parity was a core objective of the 2018 NPF, the ESRI’s updated research did not consider a scenario where this would be delivered, nor did it include analysis of how it may be delivered. The ESRI’s research also does not reflect the more balanced share of growth witnessed in the 2016 to 2022 census period than that witnessed in the 2011 to 2016 census period.

As noted in the Draft NPF, it will require substantial public intervention and investment to alter established patterns of imbalanced regional growth. To support this, further research from the ESRI or others would be beneficial in determining the policy mechanisms and interventions which would have the greater impact in delivering upon the core objective for a more balanced distribution of population growth.

Transition from Business as Usual to Balanced Regional Growth

The population targets set out in the NPF Implementation Roadmap to 2026 and 2031 were aspirational with regards to how soon that balanced patterns of regional growth would be achieved. Given the timeframes of NPF publication (2018), the adoption of Regional RSES policies (2020), and making of Developments Plans (2021-23), it was always likely that continued patterns of focused growth in Dublin and Mid-East compared to other Regions and Cities would be evident in Census 2022.

It is increasingly likely that a similar pattern will be witnessed in the 2027 Census, considering data on housing completions and commencements from 2022 to now which shows over 60% of housing delivery occurring in the Eastern and Midlands Region.

The other four Cities also require enabling infrastructure and investment in housing delivery to put them in a position where they can grow at a similar and faster rate than Dublin as targeted in the NPF. That is not likely to begin influencing patterns of growth until the later part of this decade and beyond 2030. If it is to occur, it will require a substantial reappraisal of current capital infrastructure investment commitments and prioritisation for the four Cities.

It would be appropriate for realistic transition phase targets to be established to account for the growth patterns that are effectively “locked in”. If that’s acknowledged now, then it will help to ensure a more effective strategy for implementing objectives for regional parity.

Reduced Role and Influence of the Four Cities

While objectives for regional growth are still broadly consistent with the targets in the original NPF, the Draft NPF envisions a significantly reduced role for our regional Cities in catering for overall growth up to 2040. This compares with a significantly increased role for Dublin within the same period. It would be appropriate for the Draft NPF to revise the targets for Cork, Limerick and Waterford so that they are targeted deliver the same proportion of overall growth for the Southern Region (circa 55%) as was the case in the original NPF.

It is unclear why a revised uniform target of 40% growth has been included for the four Cities for the 2022-2040 period. The four Cities grew at different rates from 2016 to 2022, and each faced particular issues and challenges to growth in that time. Each City is positioned differently to capitalise on opportunities for growth, and they are likely to grow at different rates over the NPF timeframe. For example, Cork grew at the lowest rate of 6.7% in the census period, but has witnessed a high level of planning activity which means it is well positioned for a high level of growth in the coming years. Waterford grew at the fastest rate of any City (11%), but recent planning and development activity indicates that same rate of growth will be difficult to achieve within the next census period.

Definition of Cities and Suburbs and Metropolitan Areas

The Cities as they are referred to in the NPF, and the figures cited for current and future population targets, relate to how they are defined by the CSO as Built Up Areas (BUAs). This doesn’t account differing context each City has with regards to local authority administrative boundaries, and the wider Metropolitan Areas which form a crucial basis for regional and local planning policy, and ultimate implementation of NPF targets.

Figures for Cork City and Suburbs are being presented based on the CSO definition of the BUA, rather than the administrative area of Cork City Council. While this approach is appropriate for other Cities, in the case of Cork it results in can result in a conflation of figures between the BUA and administrative area of Cork City Council, the later of which has the principle role managing growth of the City.

In the case of Limerick, it is formally recognised as the Limerick-Shannon Metropolitan Area, while small parts of the City and Suburbs falling within County Clare. With regards to Waterford, the City and Suburbs includes lands within County Kilkenny to the north, including the Ferrybank area which has been identified as a significant area of urban expansion.

The relationship of Cities and their growth targets to respective local authorities, and to their wider Metropolitan Areas, should be given greater consideration with the NPF.

Section 3: Distribution of Population Growth 2016 to 2022

This section presents analysis of the key trends in patterns of population growth from Census 2022, with a particular focus on trends within the Southern Region and how this sits within the National context.

The detailed dissemination of the results of Census 2022 were published in the summer and autumn of 2023, and provides crucial insights regarding the implementation of the NPF’s key objectives.

It should be noted that this represents patterns from the early stage of the Project Ireland 2040 process with local authority Development Plans only recently adopted. It should not be expected to see the full impact of recent policy shifts in terms of balanced regional growth. However, the results are important to understanding the direction of travel, and the impact on population and housing targets from recently adopted Development Plans.

It should also be noted that that when Census 2022 was carried out on the 3rd April 2022, this was a point in time following a recent lifting of Covid 19 restrictions, and where significant working from home patterns were still evident. The impacts of immigration due to the war in Ukraine were also not fully realised. These and other issues have had a major influence on the growth pressures across the State in the period since.

Population Growth of the Region and Strategic Planning Areas

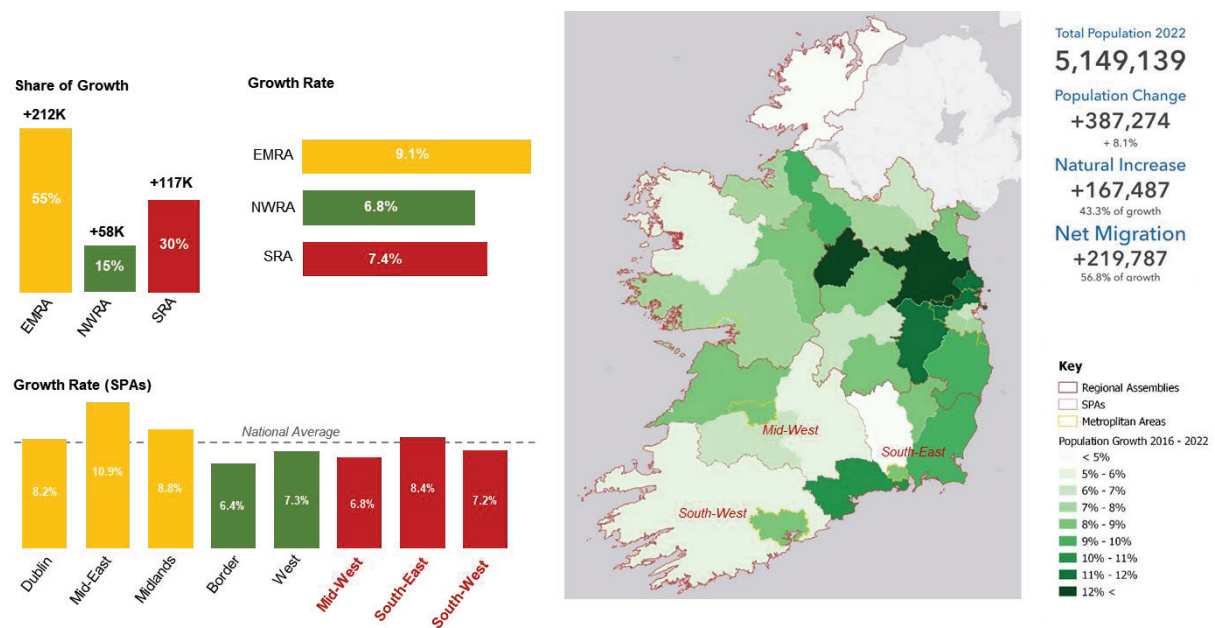


Figure 6: Overview of national and regional population growth, 2016 to 2022 (Source: Regional Development Monitor)

The population of the Southern Region grew by 7.4%, with the Eastern and Midland Region growing by 9.1% between 2016 and 2022 showing distribution of growth was significantly weighted in favour of the east. Within the Southern Region, the strongest level of growth was experienced within the South East Strategic Planning Area (SPA) at 8.4%, followed by the South West at 7.2% and the Mid West at 6.8%. Nationally, it is noteworthy that that Eastern SPA experienced the most significant rate of growth across the period at 10.9% reflecting a focus of growth within Dublin’s commuter belt, with the Dublin SPA growing by 8.2%,

Population Growth of Local Authorities and Metropolitan Areas

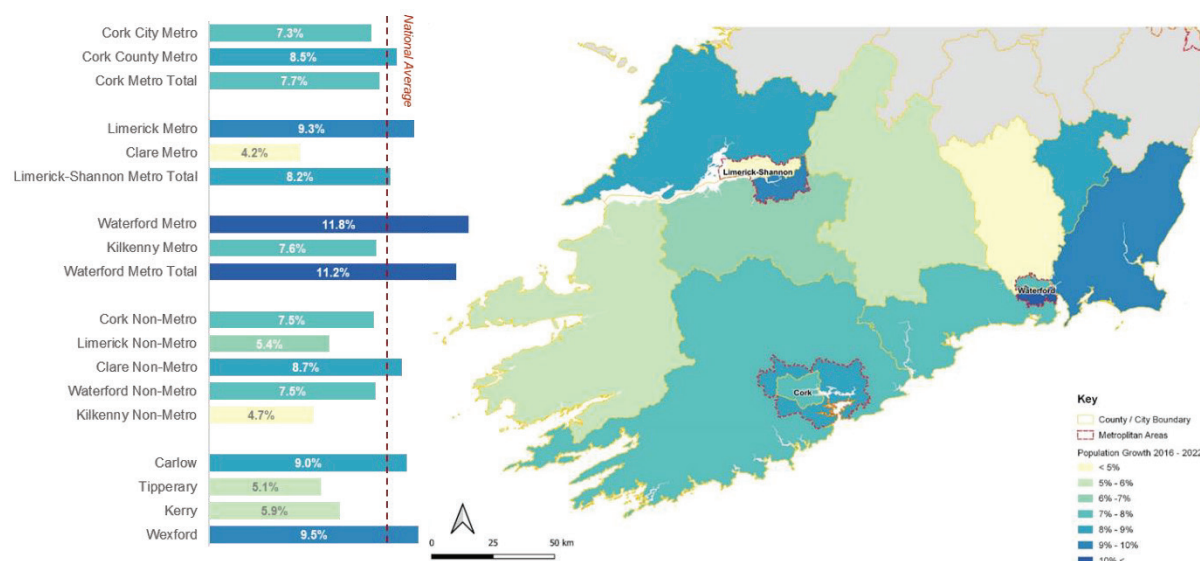


Figure 7: Overview of local authority (including metropolitan and non-metropolitan) area population growth 2016 to 2022 (Source: Census 2022, SRA Analysis)

At local authority level in the Region, the highest rates of growth were experienced in Counties Waterford (9.6%), Wexford (9.5%) and Carlow (8.8%). Despite the rate of the growth in the wider South-East, Co. Kilkenny experienced the lowest rate of growth in the Region at 5%. Of the three Metropolitan Areas: Cork grew by 7.7%, which is below the national average; Limerick-Shannon grew just above the national average at 8.2%; while Waterford grew at a higher rate of 11.2%.

Percentage Rates of Growth versus Population Projections

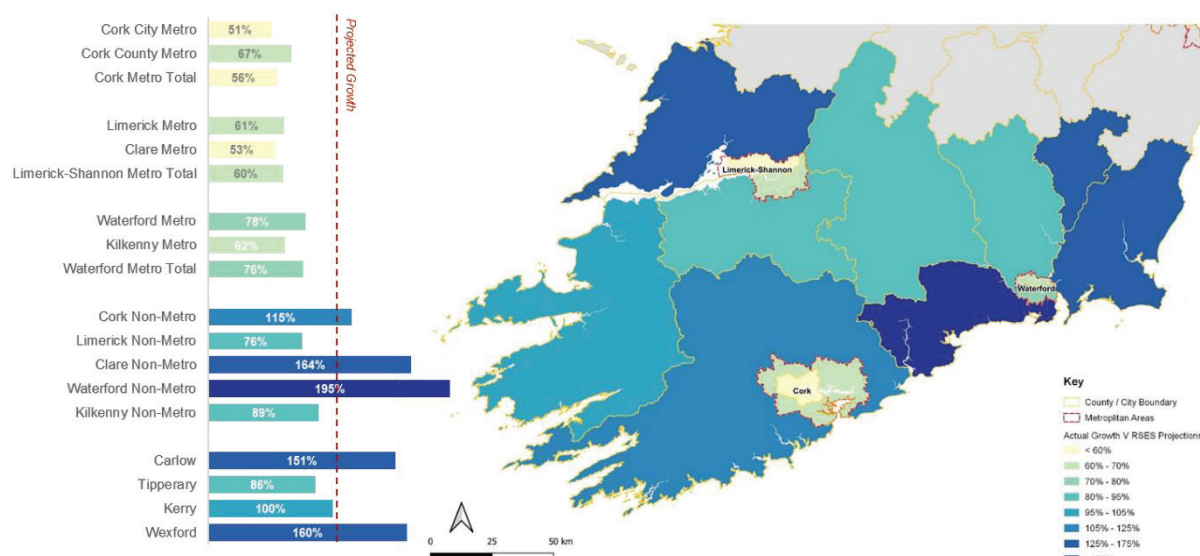


Figure 8: Actual Versus Projected Population Growth for local authorities (including metropolitan and non-metropolitan areas) the Southern Region, 2016 to 2022 (Source: Census 2022)

In identifying planned growth targets across the Region, the RSES sets out projected growth from 2016 to 2026, and to 2031. When rates of growth to 2026 are extrapolated for 2022, it is evident that the Southern Region grew by 91% of its projected rate of growth, the Eastern and Midland Region by 134% and the Northern and Western Region by 83% based on the NPF Implementation Roadmap projections.

Counties Carlow, Wexford and non-metropolitan parts of Counties Waterford and Clare grew significantly above their projected rate of growth (> 150%). Significantly, the non-metropolitan part of Co. Waterford grew at 195% of its projected growth. By comparison, the Metropolitan Areas generally grew at a significantly lower rate than projected: Cork 56%; Limerick-Shannon: 60% and Waterford 76%. This shows a significant divergence on how Metropolitan Areas and the remainder of the Region are growing.

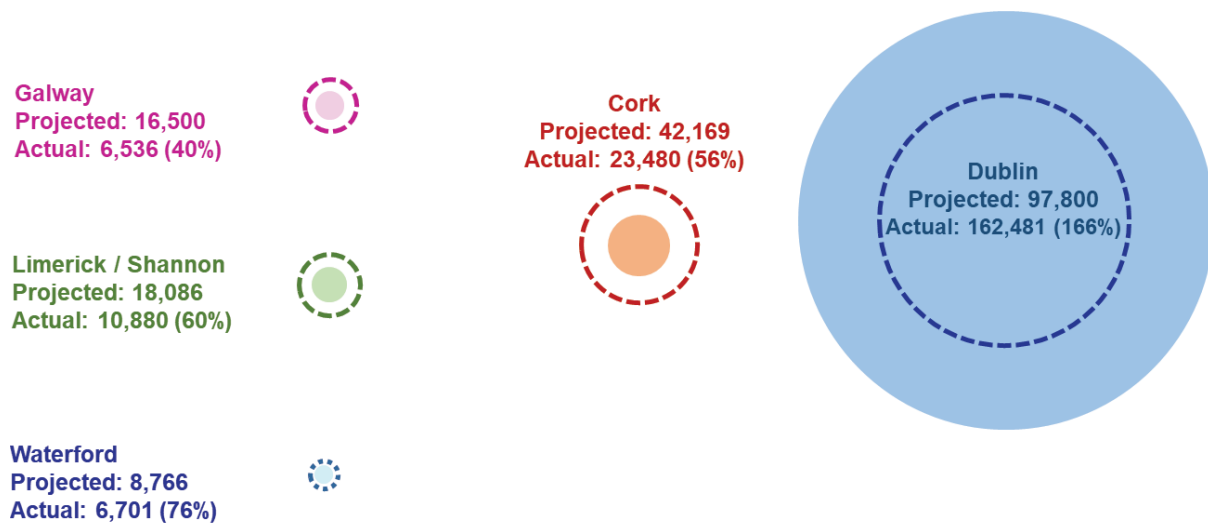


Figure 9: Projected versus Actual Growth of Metropolitan Areas (shown as a percentage), 2016 to 2022 (Source: ...)

As set out in Figure 9, there is a significant disparity between the rate of growth of the Dublin Metropolitan Area compared to the other four Metropolitan Areas. Population targets set out in the NPF, and subsequently refined for each of the Metropolitan Area Strategic Plans (MASPs) envisioned that growth of the within the Dublin Metro would be generally matched by the quantum of growth in the other four Metros combined. What actually occurred is that the Dublin Metro experienced over three times the quantum of the growth of the other four Metros combined.

This highlights the major challenge faced in delivering the NPF’s objective for regional parity, particularly those faced by the four Cities in realising their ambitions and potential.

Population Growth of Key Towns

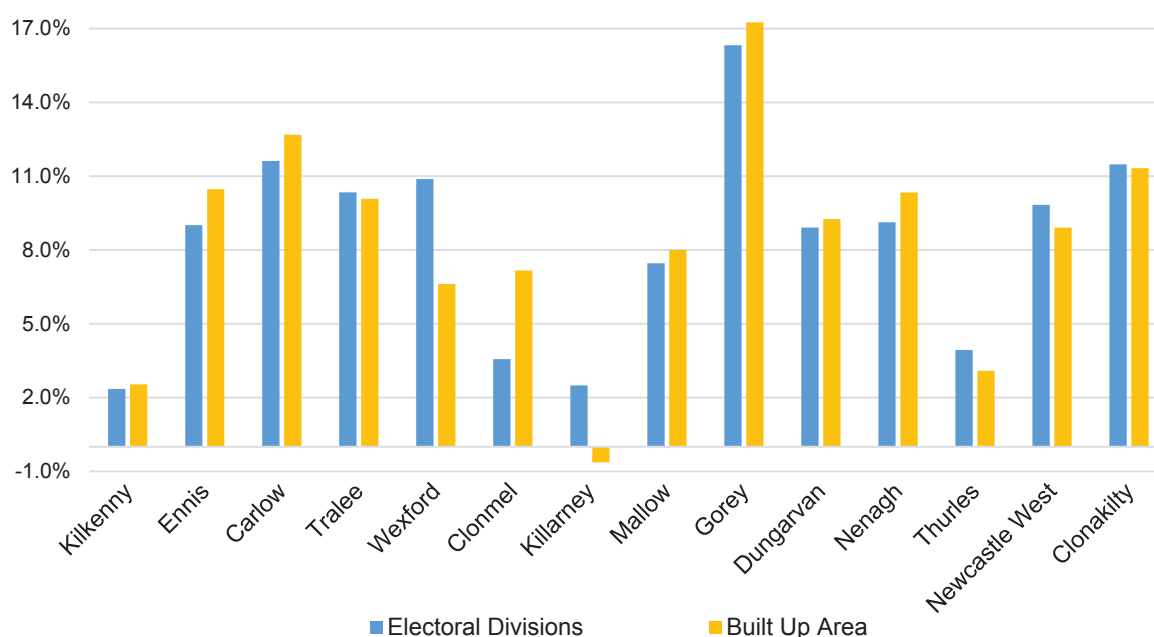


Figure 10: Percentage Population Growth of Key Towns 2016 - 2022 - EDs and BUAs (Source: Census 2022)

As a result of discrepancies between from the redefined town boundaries from Settlements in 2016 to Built Up Areas in Census 2022, population change of Electoral Divisions within and adjacent to Key Towns has also been included to give a more accurate comparison in some instances. The Region's Key Towns grew by 8.1% in total, with an average of 8.4%. Ennis is now the largest Key Town in the Region, with a population of 27,923, having grown by 10.5%. Gorey experienced the highest rate of growth at 17.3%. Its location within commuting distance to Dublin appears to be a significant factor in this. Some towns experienced very low levels of growth, such as Kilkenny and Killarney. However this may be due to the strong role of tourism and visitor accommodation in these towns, experiencing significant economic disruption as a result of lockdowns during 2020 and 2021.

Section 4: Housing Delivery from Planning and Development Activity

This section sets out an analysis of housing delivery in the Southern Region, and its context within overall housing delivery nationally, primarily for the 2022/23 monitoring period. The data cited in this analysis is primarily sourced CSO statistical releases on new dwelling completions, commencements and planning permissions for that period, unless otherwise stated.

Housing Delivery in the Region and Strategic Planning Areas

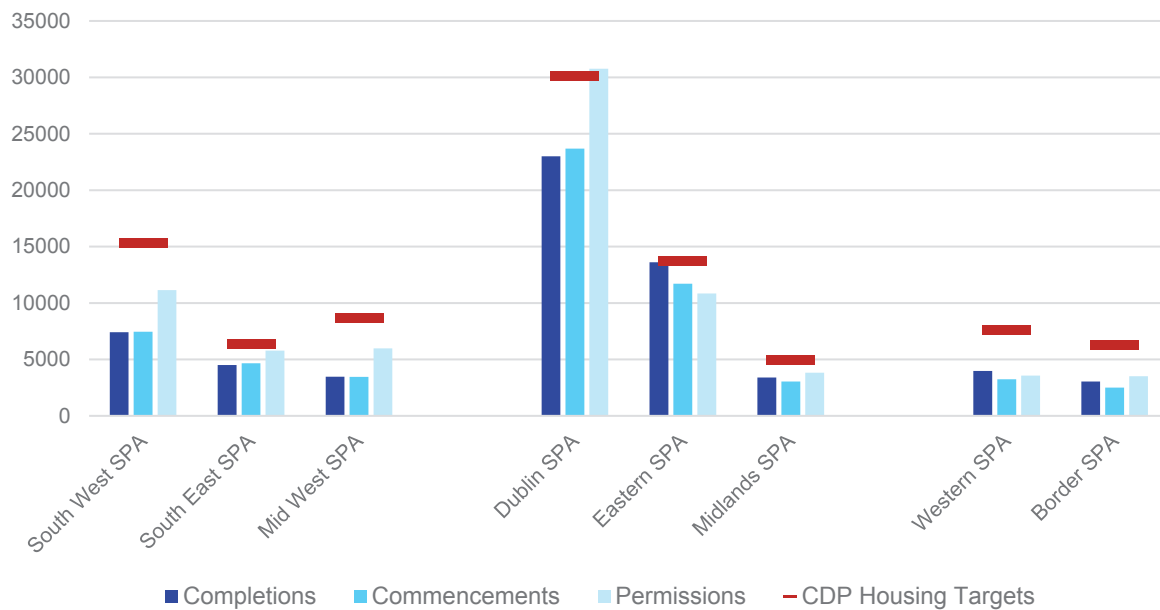


Figure 11: Housing Development Activity across SPAs, 2022-2023 (Source: CSO Statistical releases on new dwelling completions, commencements and planning permissions granted and Development Plans)

During 2022 and 2023, 62,421 housing units were completed nationally, 15,395 (25%) of which were in the Southern Region. During the same period 59,758 units commenced nationally, of which 15,581 (26%) was in the Southern Region. Planning permission was granted for 75,402 units nationally, of which 22,894 (30%) was in the Southern Region. When planning and development activity is considered against annualised housing targets from Development Plan Core Strategies, activity is falling significantly short of targets in the Southern Region with the exception of the South-East SPA. This compares with the Dublin and Eastern SPAs, where figures are more closely aligned to targets.

Housing Delivery for Local Authorities in the Region

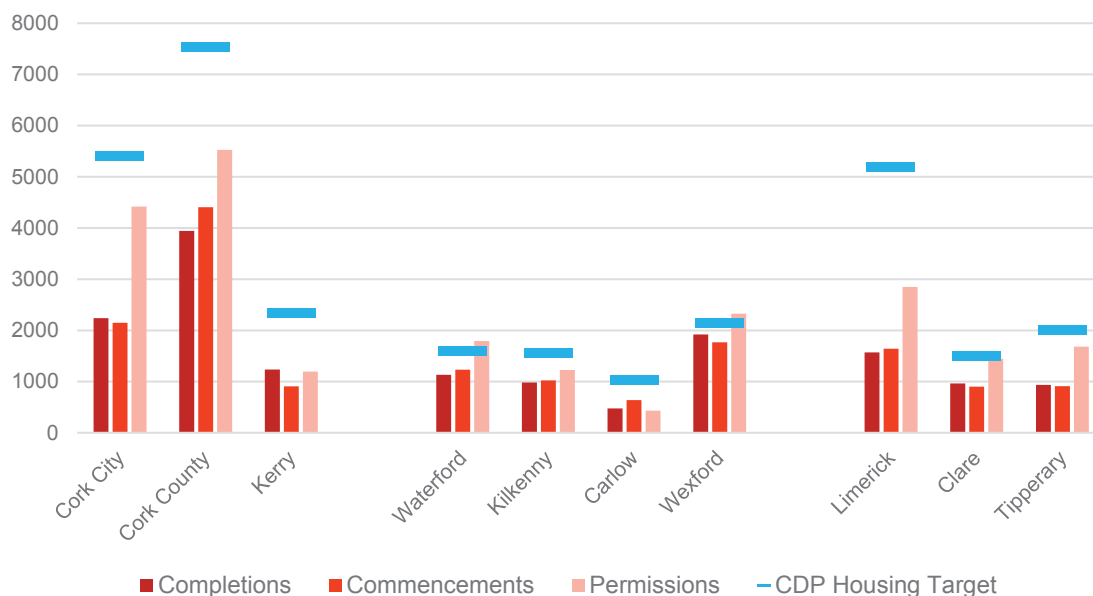


Figure 12: Housing Development Activity for Local Authorities in the Southern Region, 2022-2023 (Source: CSO Statistical releases on new dwelling completions, commencements and planning permissions granted and Development Plans)

Counties in the South East SPA show the greatest alignment in terms of Development Plan Core Strategy targets and housing and development activity. Limerick experienced the lowest level of housing delivery compared to its targets. Cork City also saw low levels of completions (41%) and commencements (40%), though a significantly higher rate of permissions (82%).

Type and Location of Housing in the Southern Region

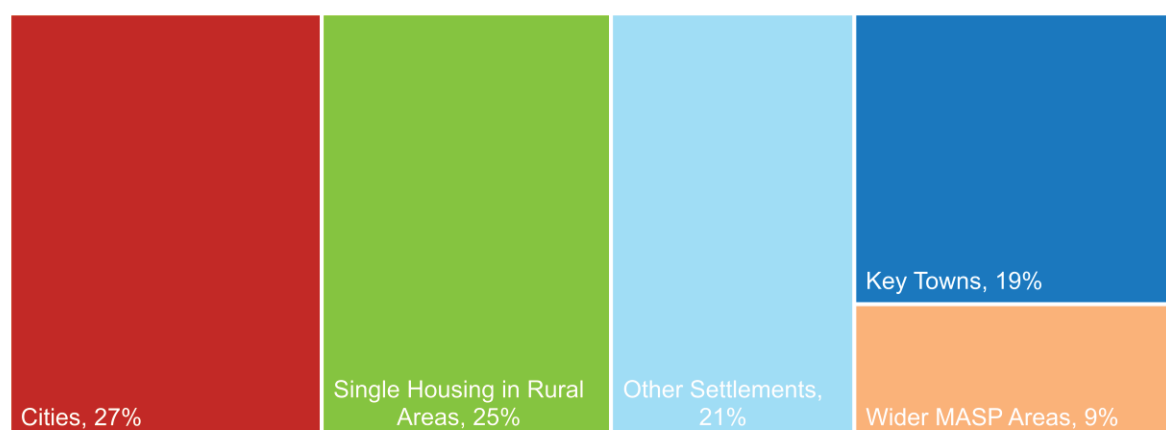


Figure 13: Housing Unit Completions by Settlement Type 2022 and 2023 (Source: CSO Statistical releases on new dwelling completions, commencements and planning permissions granted and Development Plans)

The following trends are evident for housing units completed across the Southern Region in 2022 and 2023:

- Of the 15,400 units completed: 59% were scheme houses, 30% single houses and 11% apartments.
- 35% of housing units were delivered within the Cork, Limerick-Shannon and Waterford Metropolitan Areas. The RSES aims for approximately 75% of housing to be delivered within the Metropolitan Areas. The Cork Metropolitan Area accounted for 24% with Limerick-Shannon delivering 7% and Waterford 4%.
- It is noteworthy that 25% of all new housing units delivered in the monitoring period were single houses in rural areas.

Housing Delivery within Ireland's Five Cities

Ireland's five Cities accounted for 24,600 new homes in 2022 and 2023 or 39% of all completions nationally. However, as set out in Figure 14, 82% of these units have been delivered in Dublin. There is a particularly stark disparity in the levels of apartment development between Dublin and other Cities, which has been an established trend for a number of years. In the six year period from 2018 to 2023, 28,400 apartments have been completed across Ireland's five Cities. Of these, 26,326 (93%) have been delivered in Dublin. Of those apartments that have been delivered in other Cities, the vast majority have been delivered as social or affordable housing, with an absence of market sale or built to rent apartment developments.

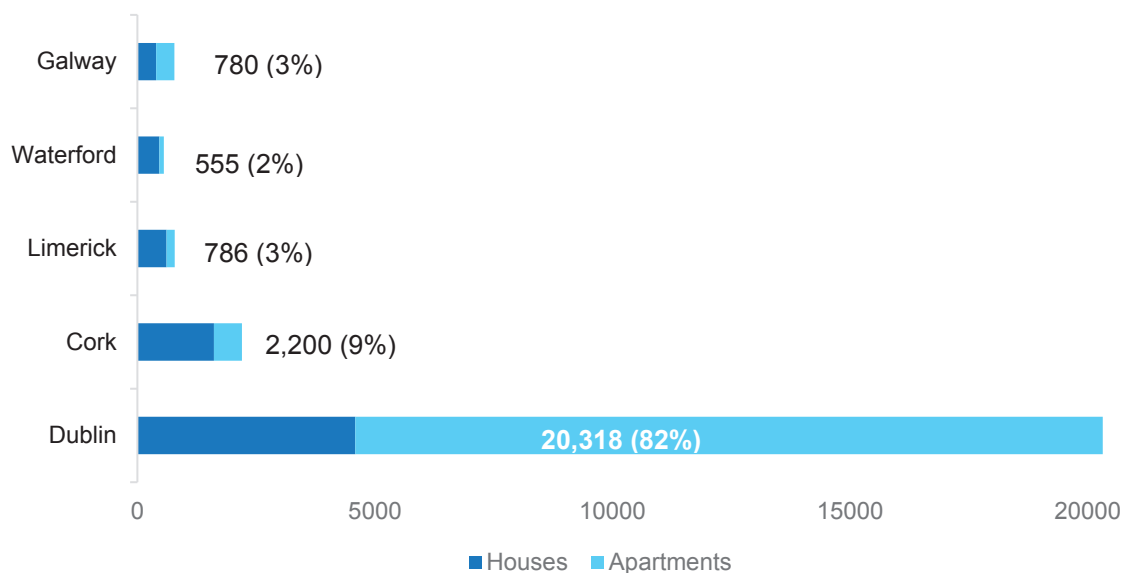


Figure 14: Housing Delivery within Cities 2022 and 2023 (Source: CSO Statistical releases on new dwelling completions, commencements and planning permissions granted and Development Plans)

These statistics demonstrate that there has been a persistent under delivery of housing, and apartments in particular, in Cork, Limerick and Waterford in comparison to Dublin. This disparity in regional housing delivery is an established pattern, which reaches back to the beginning of the recovery in residential development sector in the middle of the previous decade. The key factor behind this trend has been a near total absence of the private

delivery (and financing) of apartment schemes, with the costs and financial viability cited as the primary underlying cause. While this has been an issue nationally, higher values have resulted in the consistent delivery of private apartment developments in the Dublin area, in particular build to rent schemes financed by international investment.

The absence of apartment development in regional Cities over a sustained period of time is likely to be a key factor in the disparity in population growth between them and Dublin witnessed in the intercensal period. As well as resulting in an overall shortfall in housing delivery, it is hampering the regeneration of urban areas and delivery of objectives for delivering more sustainable higher density residential development in the core of our cities. There is an urgent need to address the issues of apartment delivery in regional cities if they are to fulfil their roles as effective economic counterbalances to the Dublin region

It should also be noted that the challenges faced in our Cities with regards to brownfield activation and apartment delivery is even more pronounced in large Towns across the Region.

Relationship of Housing Delivery and Population Growth



Figure 15: Housing Stock Increase and Population Increase of Metropolitan Local Authorities 2016 to 2022

Figure 15 sets out the relationship between housing stock increase and population increase across the local authorities of the Dublin Metropolitan Area, and those of Cork City, Waterford and Limerick. In Cork, Limerick and Waterford, the rate of increase in housing stock in relation to population increase is substantially lower (average of 55%) than that of the Dublin Metropolitan local authorities (average of 87%).

Generally this demonstrates that growth within the Southern Region has relied more heavily on vacancy and under occupancy to cater for growth, while growth in location authority area in Dublin and the Mid-East is being influenced by higher rates of housing delivery.

Conclusion

This analysis identifies significant challenges with regards to housing delivery in the Southern Region. It also evident that under delivery of housing is more pronounced in our Region, and within our Cities and large Towns in particular, than it is in the Dublin and Mid-East areas.

There are a number of factors that may influence the regional disparity in housing delivery, with some of the key factors including:

- Earlier recovery of the housing market, as part of broader economic recovery, in the Dublin and Eastern Regions/SPAs in comparison to other regions.
- Higher housing values in the Dublin and Eastern Regions/SPAs making them more attractive to residential developers, and resulting in improved financial viability, particularly for apartments.
- Greater reliance on foreign institutional investment, as opposed to traditional lending, for house building which is primarily focused on the Dublin housing market.
- Disparity in levels of public investment in infrastructure and housing.

Section 5: Employment and Commuting Patterns

This Section assess trends in employment and commuting patterns within the Southern Region, and in a national context.

Employment Growth 2016 to 2022

Region	Total No. Employed	Change 2016 - 2022	% Emp. Share	% Pop. Share
State	2,320,297	16%	-	-
Southern	749,745	16%	32%	33%
Eastern and Midlands	1,180,014	16%	51%	49%
Northern and Western	390,538	15%	17%	18%

Table 1: Employment in Ireland (2022) by Region (Source: CSO Census 2022)

As set out in Table 1 there were over 2,320,000 people employed in Ireland as per the 2022 Census, a 16% increase from 2016. Table 4.2 outlines the number of jobs within the main settlements in the region. Cork is largest employment centre in the region, with 113,067 jobs, an 11% increase from 2016, and 5% share of jobs (where a place of work is recorded) nationally. Both Limerick and Waterford saw higher rates of growth in job numbers at 12% and 14% respectively.

Settlement	Total No. Jobs	Change 2016 - 2022	% Emp. Share	% Pop. Share	J:RW Ratio
Cork	113,067	11%	5%	4%	1.3
Limerick	49,871	12%	2%	2%	1.3
Waterford	27,704	14%	1%	1%	1.2
Key Towns in SRA	99,688	7%	4%	5%	1.1
Dublin	577,835	13%	25%	25%	1.2

Table 2: Number of Jobs within Cities and Key Towns (Source: CSO Census 2022)

The rate of jobs growth in the regional Cities is aligned with that of Dublin (13%), which contrasts with population growth and housing delivery outlined in previous sections which shows a much lower rate of growth in the regional cities when compared to Dublin.

It is also noteworthy that each of Cork, Limerick and Waterford have a higher Jobs to Residents Workers Ratio than Dublin, demonstrating that have higher rates of inward commuting than the Capital.

The Region's Key Towns employ just under 100,000 people collectively, 4% of the national share. However, Key Towns saw a lower rate of increase in total job numbers from 2016 to 2022 of 7%.

Labour Force Survey

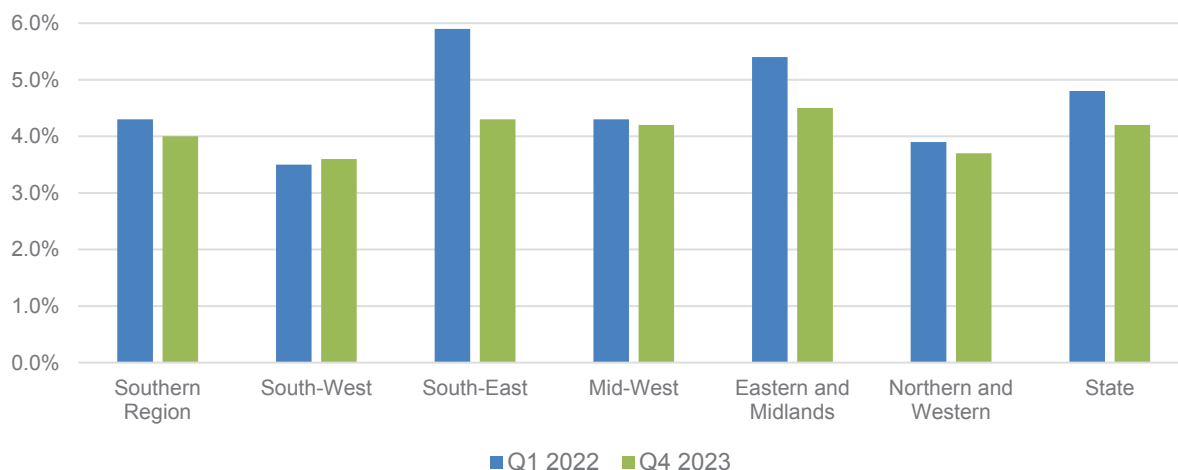


Figure 16: Unemployment Rate Q1 2022 to Q4 2023 (Source: CSO Labour Force Survey)

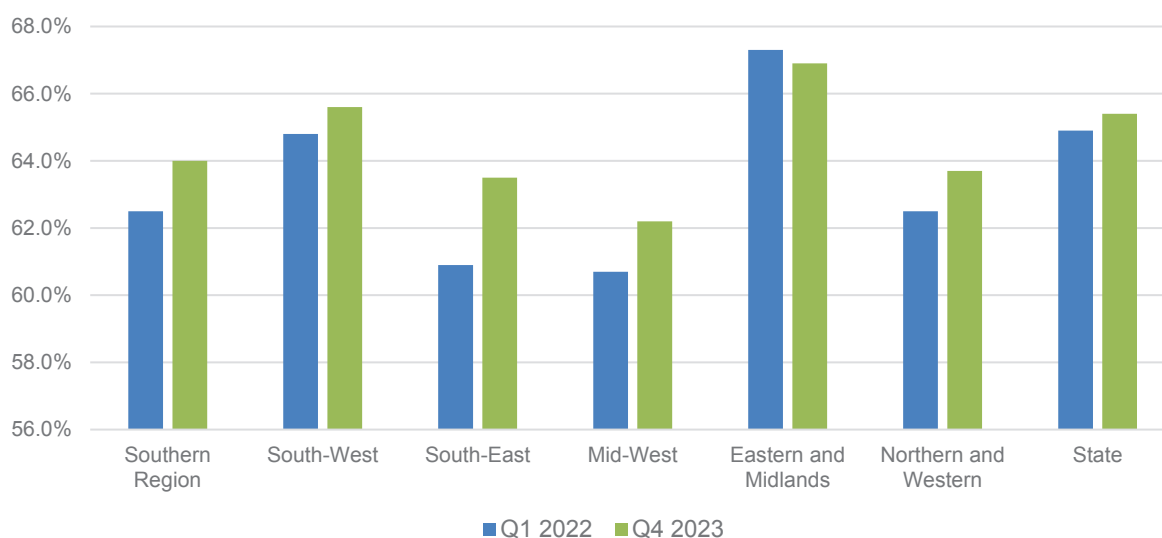


Figure 17: Labour Force Participation Rate Q1 2022 to Q4 2023 (Source: CSO Labour Force Survey)

The *CSO Labour Force Survey* quarterly reports provide estimates on unemployment and labour participation rates across NUTS 2 and NUTS 3 Regions (SPAs). As of Q4 2023, the Southern Region had an unemployment rate of 4%, a reduction of 0.3% from the start of the period. Within the Region, the South-West SPA has the lowest level of unemployment, with moderately higher rates in the Mid-West and South-East. The labour participation rate for the Southern Region is 64%, highest in the South-West at 65.6%, and lowest in the Mid-West at 62.2%. The Eastern and Midlands Region has the highest Participation Rate at 66.9%. However, the gap between the Southern and Eastern and Midland Regions has reduced significantly over the monitoring period.

The Labour Force Survey data indicates strong economic performance in the Southern Region within the monitoring period. Notably, the rate of jobs growth and levels of employment in the Southern Region is in line with, and potentially performing more strongly than, than Dublin and the Mid-East. This contrasts with rates of housing delivery, which shows much higher levels of activity in the Eastern and Midland Region compared the Southern Region.

Share of Employment by sector in the Southern Region

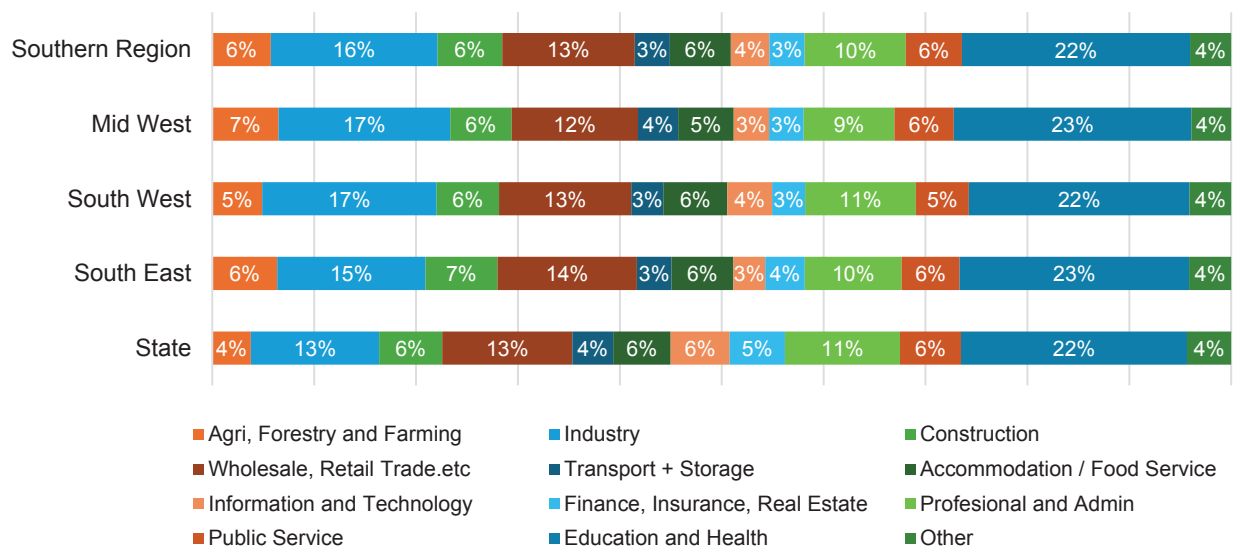


Figure 18: Share of Employment by Sector within the Southern Region, NUTS Regions and State as a whole (Source: Census 2022)



Figure 19: Percentage Change in Employment by Sector, 2016 to 2022 (Source: Census 2022)

Generally, there is no significant variance of sectors across the State or Region. Within the Southern Region, there is a slightly higher proportion of workers employed in Agri, Forestry and Farming, Industry and Construction than the national average, while there is slightly less

employed in IT and Financial Services. From 2016 to 2022, the biggest increase in employment was in IT, Professional and Administration, and Construction.

Extent of City Regions

Figure 20 presents the extent of the “City Regions” of Ireland’s five Cities, in line with the standardised EU/OECD definition as the commuter catchment from where at least 15% of the relevant city area workforce is drawn from.

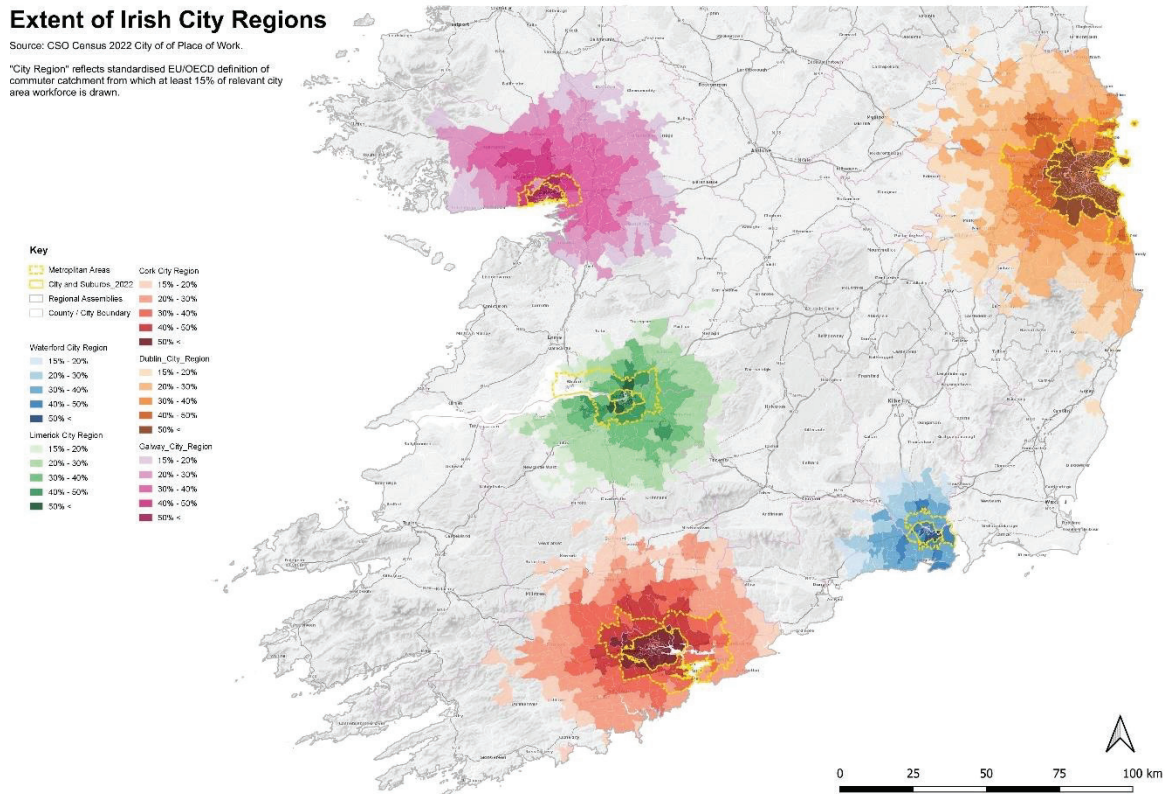


Figure 20: Extent of Irish City Regions (Source: Census 2022)

Within the Southern Region, it is notable that Cork and Limerick have a significant economic influence within the Mid-West and South-West SPAs respectively. By comparison, Waterford has a more limited economic influence over the South-East SPA. It is noteworthy that despite its proximity, no part of County Wexford is within the Waterford City Region, while two areas in the north of the County fall within the Dublin City Region.

When considered alongside Dublin, it is clear that as well as having higher Jobs to Resident Worker Ratios, the other four Cities also have proportionally larger City Regions. It is noted within the Draft NPF, and often cited in public commentary on current housing challenges, that there is a particular issue in Dublin that a large portion of workers are forced to live outside of the City and commute for work. The evidence demonstrates that this is an even more pronounced issue in the other four Cities.

Modal Share

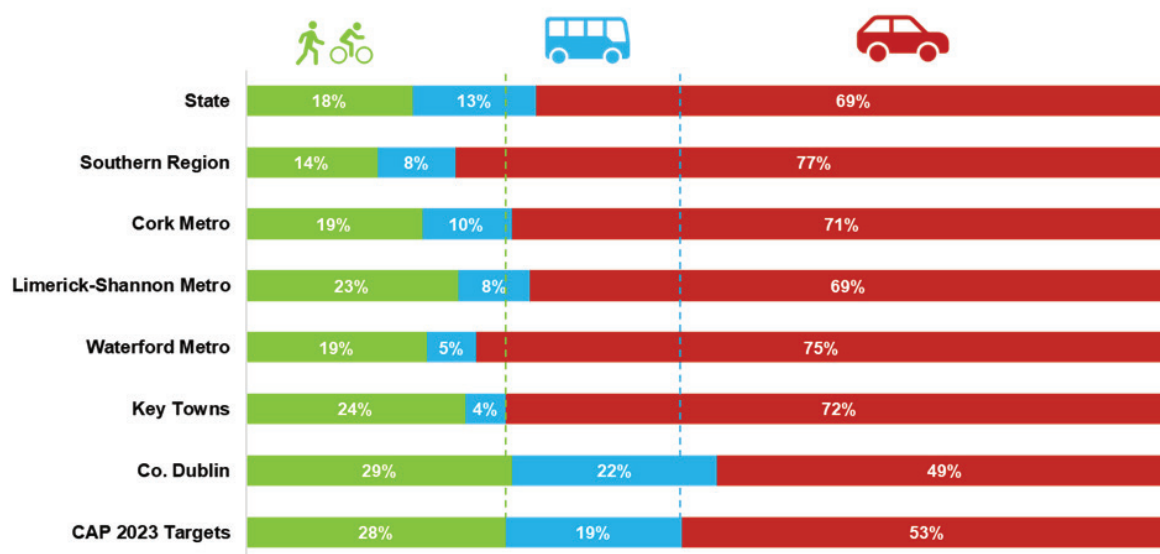


Figure 21: Modal Share of Travel to School, College or Work 2022 (Source: Census 2022)

Modal share of travel to work, college or school showed no significant change between 2016 and 2022, either at national or regional level, with only minor reductions (< 1%) in the proportion for both active travel and public transport, and a minor increase in the share for private vehicles. By comparison to the national profile the Southern Region has higher levels of car dependency and lower levels of active travel and public transport. It is particularly noteworthy that the three metropolitan areas in our region have significantly higher levels of car dependency, and less than half the rate of public transport use, than Co. Dublin.

When considered against modal share targets for 2030 as set out in Governments Climate Action Plan 2024, it clearly demonstrates the major challenge that the Region faces in achieving more sustainable transport patterns. It highlights the importance of investment in high quality and high capacity public transport infrastructure including BusConnects, Suburban Rail and Light Rail and investment in active travel infrastructure. It also demonstrates the importance of delivering and enabling compact patterns of growth, and in delivering a higher proportion of housing in more sustainable locations.

Capital Investment in Infrastructure (NPD 2021 – 2031)

A central component of Project Ireland 2040 is to ensure the alignment of investment plans with the stated National Strategic Objectives of the NPF in a considered, cohesive and defined manner. Specifically, this is to be ensured through effective oversight of the National Development Plan (NDP), which sees a total public investment of €165 billion from 2021 to 2030. The Department of Public Expenditure NDP Delivery and Reform (DPENDR) has responsibility for oversight and delivery of the NDP. In its submission DPENDR noted that it has responsibility for allocating expenditure on a departmental, and not on a geographic basis. It is also responsible for ensuring that individual projects satisfy the requirements of the Infrastructure Guidelines with the responsibility for ensuring that overall departmental spending programmes are aligned with the NPF resting with the individual government departments.

An important element of capital infrastructure investment is the need to address long standing deficiencies in infrastructure provision across the State. This is of particular concern for the Southern Region, as according to findings of the EU's Regional Competitive Index 2.0 infrastructure provision in the Region ranks significantly below the EU27 average at 50.7. This places infrastructure provision in the Southern Region in line with some of the most underdeveloped economies in the European Union. This contrasts with the Eastern and Midlands region where infrastructure provision ranks above the EU27 average at 115.2.

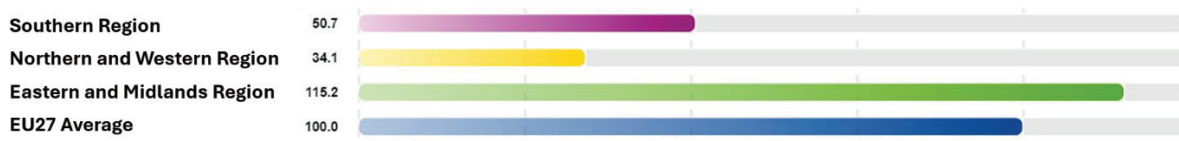


Figure 22: EU Regional Competitiveness Index 2.0 – Infrastructure (Source: European Commission)

The NDP is primarily monitored through the Project Ireland 2040 Capital Investment Tracker and Map. DPENDR has noted that the regional distribution of the number of projects identified in the tracker indicates planned investment is in line with NPF objectives for balanced regional growth. However the SRA has concerns that DPENDR based its analysis on the number rather than the nature of projects and the actual quantum of investment planned.

The SRA has carried out its own analysis of the regional distribution of infrastructure investment identified in the NDP. This assessment is based upon the projects and information identified in the most recently published version of the Project Ireland 2040 Capital Investment Tracker from April 2024: <https://storymaps.arcgis.com/stories/7682860c80d64a62b90e8a1ca3d16364> To ensure an accurate assessment of planned infrastructure investment, this assessment was based on projected project costs where available. Where this information is not available, or for NDP projects costing less than €100 million, an aggregate of the relevant project cost range from the Capital Investment Tracker has been used. The assessment also differentiates between projects at pre-implementation, and implementation-completion phase.

Some projects are categorised as national/pan regional in nature, which are projects being delivered at a specific location, but which serve a national rather local or regional purpose e.g. the National Children's Hospital.

Share of Planned NDP Investment Across Ireland's Regions and Metropolitan Areas

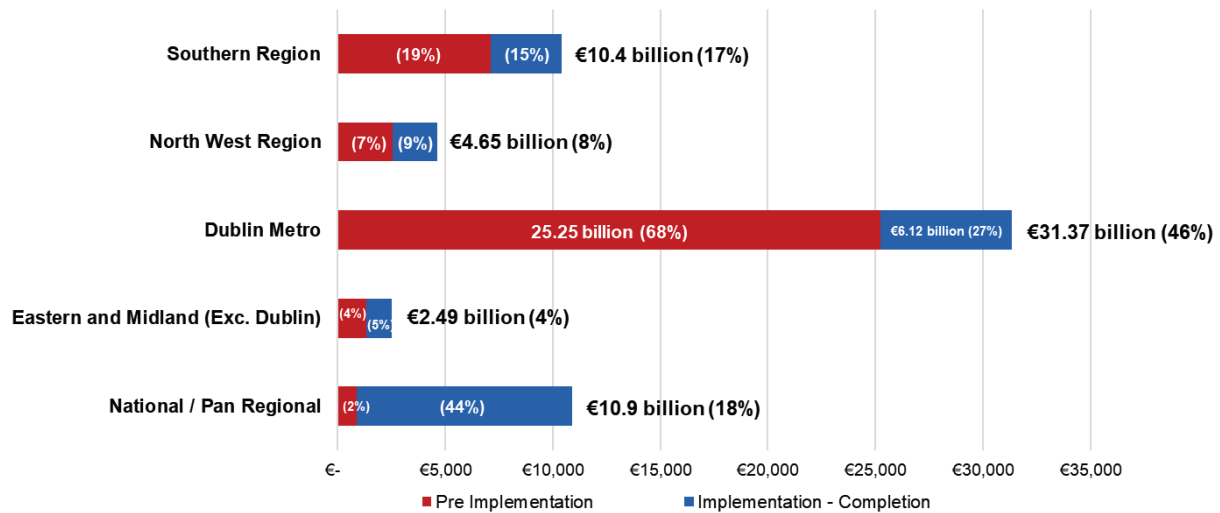


Figure 23: Planned NDP Investment across Regions (Source: Project Ireland 2040 Capital Investment Tracker, SRA Analysis)

€10.4 billion of investment is planned for the Southern Region, 17% of overall planned investment. By comparison, the Dublin Metropolitan Area accounts for €31.37 billion, 46% of total. The remainder of the Eastern and Midlands Region has been identified for €2.49 billion, or 4% of overall spend. National /pan regional projects account for €10.9 million, 18% of overall, with the vast majority at implementation-completion phase. Notably the Dublin Metropolitan Area accounts for 68% of total planned investment at pre-implementation phase, compared to 19% for the Southern Region. Many projects at post implementation/completion phase would have originated prior to the NPF or NDP, with feasibility, design, planning and business case approval taking a number of years. However, the expectation should be that projects identified at pre-implementation phase would be much more closely aligned with the core objectives of the NPF. The data demonstrates that over a period in which the NPF is targeting balanced regional growth, the Southern Region received 3.5 times less investment than the Dublin Metropolitan Area.

Share of Planned NDP Investment Across Metropolitan Areas

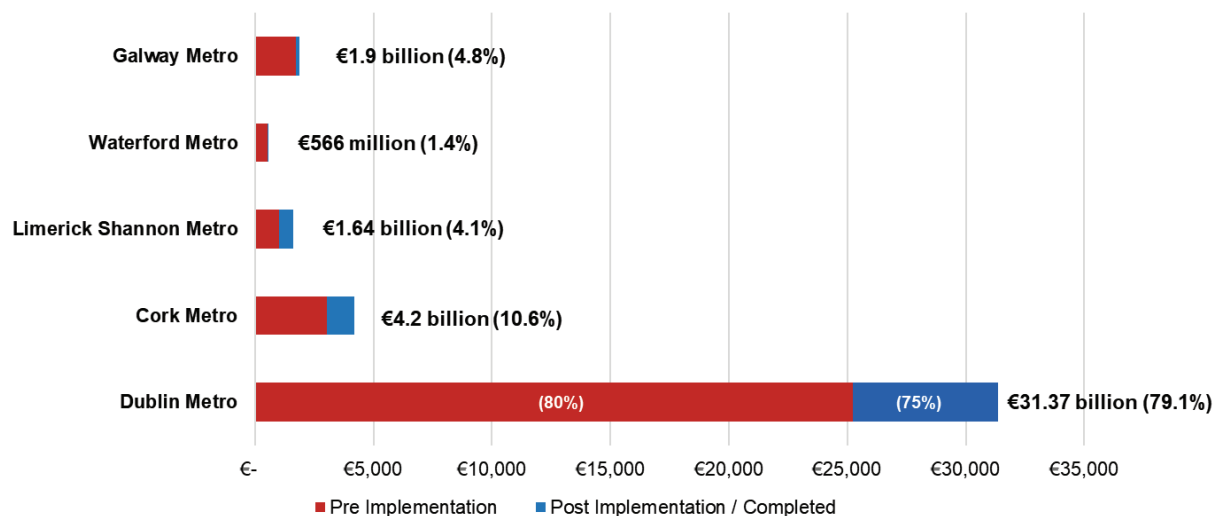


Figure 24: Planned NDP Investment across Metropolitan Areas (Source: Project Ireland 2040 Capital Investment Tracker, SRA Analysis)

When planned investment for the five metropolitan areas is considered, 79% of funding is focused on the Dublin Metro. Within the Southern Region, Metropolitan Areas are projected to deliver circa 75% of the Region’s overall growth. It is also an objective that the four regional Metros are collectively, targeted to deliver the same quantum of growth as the Dublin Metro.

Planned NPD Investment – Per Capita Assessment by Region and Metropolitan Area

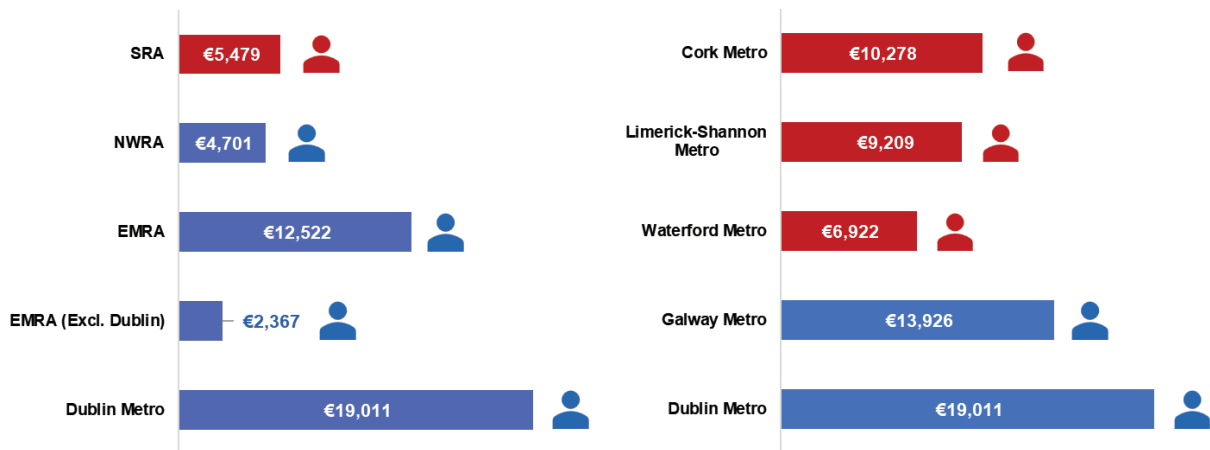


Figure 25: Per Capita Breakdown from Planned NDP Investment (Source: Project Ireland 2040 Capital Investment Tracker, SRA Analysis)

Population projections for 2031 from the relevant RSEs have been used as the basis for the per capita assessment. 2031 also represents a mid-point of NPF implementation. Planned investment in the Southern Region equates to €5,479 per capita. This is less than half that of the Eastern and Midlands Regions at €12,522. It should be noted that there is major difference in per capita investment for the Dublin Metropolitan Area (€19,011) and the remainder of the Eastern and Midlands Region (€2,367). Funding for the Cork, Limerick-Shannon and Waterford Metros are substantially lower per capita than the Dublin Metro.

Approaches to Equitable Investment in Metropolitan Areas

To understand the potential for, and implications of, a more balanced approach to investment across MASP areas, an assessment has been undertaken of what level of funding would be appropriate if based upon equitable per capita basis for projected growth. This has been undertaken based on two scenarios:

- Scenario A: Assumes no net increase of the current overall projected investment, but a redistribution of funding on an equal per capita basis (2031 projections).
- Scenario B: No change in the level of funding projected for the Dublin MASP, with an increase in other MASPs equivalent to the same amount per capita as Dublin. This would result in €6.99 billion net increase (18%) in overall spend across MASPs.

A key finding from this assessment is that a more balanced approach to infrastructure investment across metropolitan areas would, proportionally, result in much greater benefit for regional metropolitan areas than it would reduce benefits for the Dublin metropolitan

area. A 15% reduction in funding of infrastructure in Dublin would result in a 57% increase in funding within Cork, 75% increase in Limerick and a 133% increase in Waterford. If current funding for Dublin was maintained and investment in other metropolitan areas was increased to the same level, it would result in a 85% increase in Cork, 106% increase in Limerick and a 175% increase in Waterford.

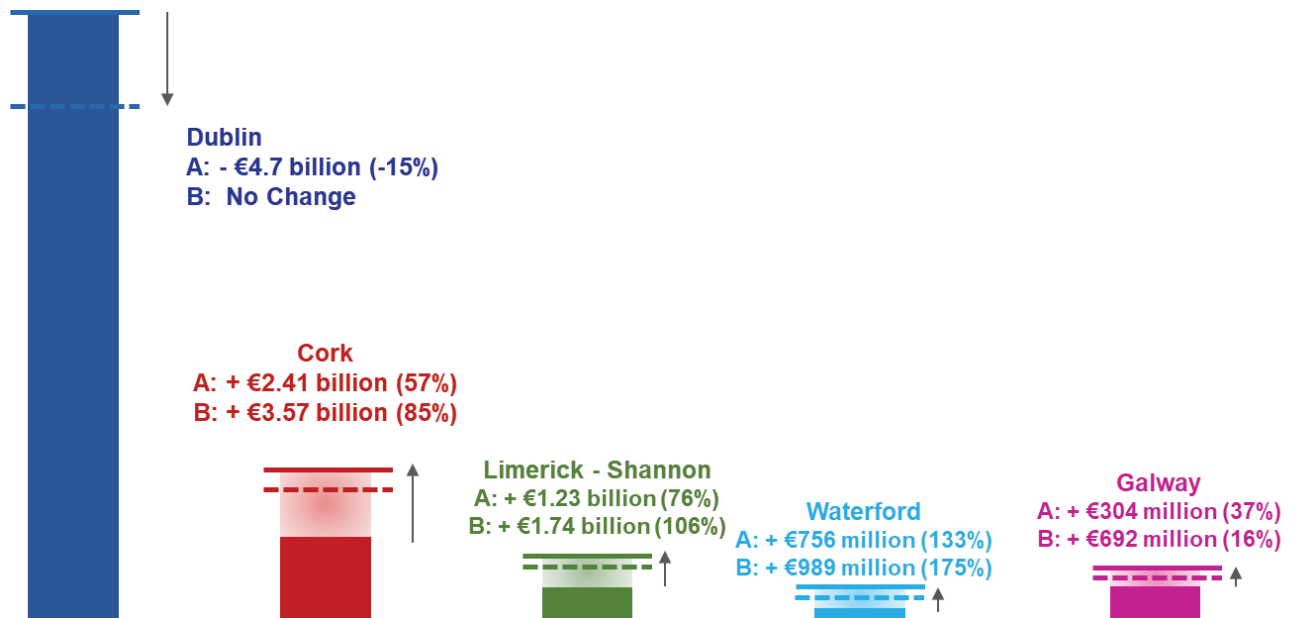


Figure 26: Assessment of Equitable Approach to Infrastructure Investment in MASP Areas

For clarify, the Region Assembly is not suggesting or seeking a reduction in current funding of projects for the Dublin MASP. The key concern of the Assembly is in ensuring an appropriate scale of investment and prioritisation of projects for the Region in future iterations of the NPD.

A similar assessment of spend per capita has been undertaken for the Metropolitan Area Transport Strategies for Cork and Limerick-Shannon, and for the Greater Dublin Area Transport Strategy. This has identified the same level of disparity in projected investment. This is potentially of greater concern as these Strategies highlight proposed investment up to 2040, so have a longer timeframe than the NDP, and include major projects which are not included within the current NDP. This indicates that future revisions of MATS for regional metropolitan areas should consider projects and interventions of additional scale and ambition.

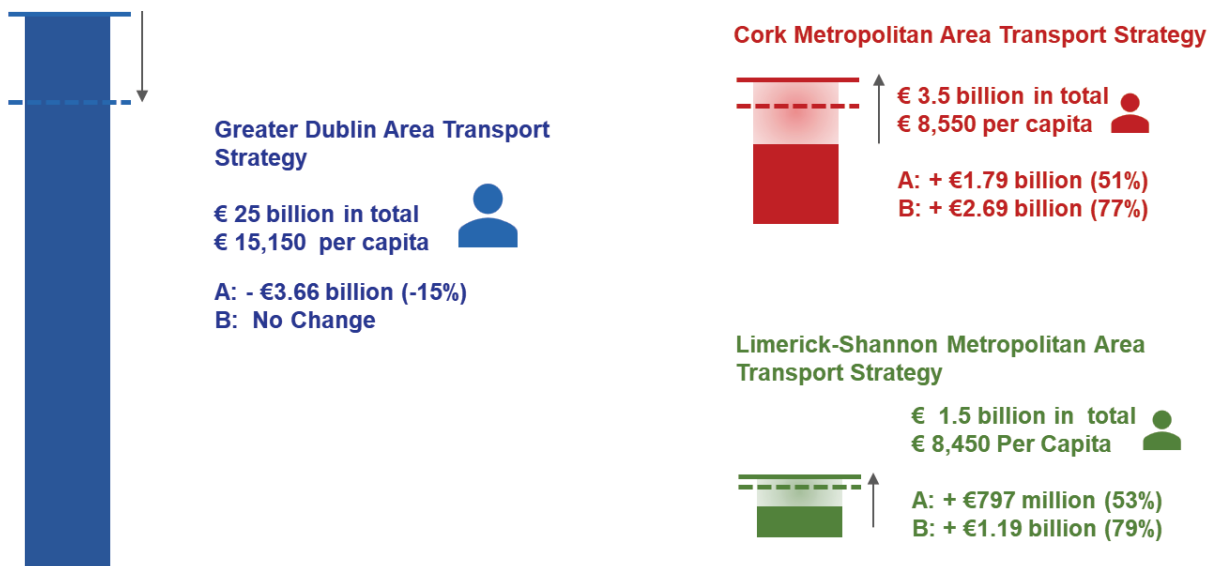


Figure 27: Planned Investment in Dublin, Cork and Limerick Metropolitan Area Transport Strategies, and analysis of equitable approaches. (Source: Metropolitan Area Transport Strategies for Cork and Limerick, Greater Dublin Area Strategic Transport Strategy, SRA Analysis)

Major Committed and Non-Committed Infrastructure Projects

The largest projects identified for delivery within the Southern Region, and which have a commitment under the NDP, are set out in the figure 28 below. This includes major road projects which have been completed in recent years, such as the M11 Gorey to Enniscorthy, the N22 Macroom Bypass, and the Dunkettle Interchange. The M20 Cork to Limerick motorway is the largest non-implemented project at a projected cost of €2 billion.

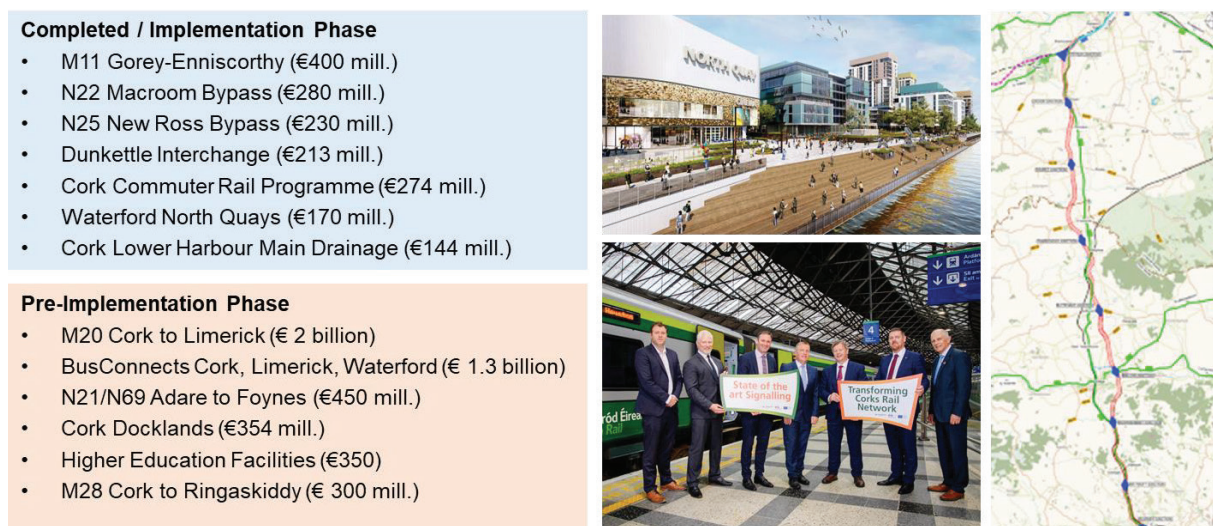


Figure 28: Projects committed under the NDP within the Southern Region

Investment in roads accounts of the substantial majority of implemented and planned infrastructure investment in the region. However, the BusConnects programmes for Cork, Limerick and Waterford collectively amounting to the second largest project at circa €1.3 billion, while investment in the Cork Commute Rail Network amounts €274 million. The latter is being supported by €164m in EU Recovery and Resilience Facility. Enabling infrastructure

When compared to investment under the broader NDP programme, the allocation of funding under the URDF is weighted strongly towards the Southern Region, and Cork in particular. This is largely a result of an allocation of €350 million towards the Cork Docklands regeneration projects, and €46 million to the Grand Parade Quarter project. In Waterford €100 million has been allocated to the North Quays regeneration project and in Limerick, €125 million was allocated to the redevelopment of Opera Square and the development of a World Class Waterfront. **It should be noted that the URDF only accounts for 4% of overall spending identified within the NDP.**



Tionól Réigiúnach
an Deiscirt
Southern Regional
Assembly

Appendix B

Key Enablers

12th September 2024

1. Key Enablers for the Region

Our Strategy for building the Region as one of Europe's most Creative and Innovative, Greenest and Liveable Regions focuses on Key Enablers to transform the Region:

- **Connecting our Region** – enhanced infrastructure from North to South and East Coast to West Coast, connecting to the Atlantic Economic Corridor & developing an extended Eastern Corridor to Rosslare Europort;
- Delivering ambitious and sustainable growth targets for our cities, developing and consolidating our Key Towns, creating the **Greenest** and most **Liveable Metropolitan Areas** for diverse communities, culture and enterprise - developing the Cork Docklands, regeneration of Limerick-Shannon, including the Limerick Northern Distributor Route/ Smart Travel Corridor, and achieving a balanced 'concentric city' model north of the river in Waterford with development of the North Quays and adjoining lands in Kilkenny;
- Creating an inclusive and **Learning Region**, building on our internationally competitive, learning partnerships, higher education institutions including establishing the new technological universities of MTU and TUSE, a new Learning Region Network and developing a Smart Region which recognises the advantages of a multilingual society and the value of using Irish both inside and outside the Gaeltacht areas;
- Investing in **Public Services** to tackle legacies, support planned population and employment growth; providing education, health, transport, community and social services and infrastructure;
- Positioning the Southern Region as **Ireland's International Gateway** at Cork, Shannon, Kerry and Waterford Airports and our sea ports;
- Making the most of **Cork and Waterford Harbours** and the **Shannon Estuary** – our natural maritime assets;
- Improving and protecting the **quality of the environment** and our rich **heritage** as custodians for future generations along the Wild Atlantic Way, into Ireland's Hidden Heartlands, through Ireland's Ancient East, the Gaeltacht and islands, and along the Blueways and Greenways;
- **Revitalising our urban areas and spaces** through creative and regenerative placemaking, to deliver on **Compact Growth and Housing Need**, and provide new vitality for City and Town Centres;
- **Revitalising Rural Areas** through readapting our small towns and villages and increasing collaboration between networks of settlements to seek higher value, diversified jobs for a higher quality of life;
- **Taking the rights steps** towards more sustainable travel, energy and in bio-economy to **lead on Climate Action** in the transition to a Low Carbon Society.

2. Key Enablers for the Cork Metropolitan Area

- Delivering ambitious large-scale, mixed-use regeneration projects in Cork Docklands (City Docks and Tivoli) identified including the provision of supporting infrastructure (rapid transit, transport infrastructure in particular Eastern Gateway Bridge, and public realm) and the relocation of ‘Seveso’ site from the City Docks and two from Tivoli Docks;
- The development of an enhanced City and Metropolitan area public transport system, focused on the concept of an east-west rapid transit corridor (Light Rail Transit) from Mahon, through the City Centre to Ballincollig, and a north-south corridor with a link to the Airport, supported by a strong core bus network;
- Upgrading the Cork commuter rail service serving the areas to the East and North of the city and providing additional stations in areas targeted for growth, such as Monard and Tivoli;
- Progressing the sustainable development of new areas for housing, especially those on public transport corridors such as Monard and urban expansion areas on the rail corridor such as at Carrigtwohill, Midleton, Cobh and Blarney;
- Identifying infill and regeneration opportunities to intensify housing development in inner city and suburban areas, supported by strengthened public transport connectivity, public realm and urban amenity projects;
- Enterprise property solutions and employment enabling infrastructure;
- Enabling enhanced opportunities for existing communities as development and diversification occurs, particularly through employment, learning and education support;
- Development of a new science and innovation park to the west of the City, accessible by public transport;
- The continued expansion of and integration with the City’s third level institutions, centres of research and innovation and strengthened supports for the role of learning, training, skills development and apprenticeships;
- M8/N25/N40 Dunkettle Junction upgrade (approved) and improved Ringaskiddy Port access (M28), upgrade of the Cobh Road (Fota Road) R624 and R630 Midleton to Whitegate Road to National Road status, to facilitate Port relocation and regeneration of docklands;
- Enhanced regional connectivity and improved journey times including the M20 Cork to Limerick and the Cork Northern Ring Road to ensure connectivity across the Cork Metropolitan area and to routes serving Limerick, Kerry, West Cork, Waterford and Dublin) and upgrade of the N22 Cork to Tralee (approved) and the N25 Cork to Waterford. Improved transport offer around the City through a package of measures including rail and light rail, improvements to the radial and orbital distributor road network, including a northern distributor road, improvements to and more effective management of the strategic road network, including the existing N40 and a future Northern orbital route, delivery of strategic bus network, delivery of the Metropolitan Area Cycle Network, provision for cycling/walkability/permeability/accessibility in the planning, design and delivery of new development;
- Improved rail journey times to Dublin and consideration of improved onward direct network connections;
- Ensuring that water supply and wastewater needs are met by new national projects to enhance Cork’s water supply and increase waste water treatment capacity;

- Improving sustainability in terms of energy, waste and water, to include district heating and water conservation;
- Improve quality and accessibility to a network of parks, recreational areas, sports facilities, playgrounds, natural amenity areas, greenways and blueways extending from a green heart in Cork City throughout the metropolitan area;
- Interconnected and integrated walking and cycling infrastructure;
- Protecting built and natural assets;
- Managing flood and climate change risks;
- Invest in digital/ICT infrastructure - Seek delivery of the National Broadband Plan;
- Ensure security of electricity supply, enhanced connection to grid from renewable technologies, roll out of EV infrastructure.

3. Key Enablers for the Limerick-Shannon Metropolitan Area

- Implementation of the Limerick 2030 economic strategy to create modern, City Centre office accommodation and a series of transformational City Centre public realm projects;
- Complementary further development of the Limerick 2030 plan through measures to encourage significant inner urban residential regeneration and development, to include the City's Georgian Quarter;
- Extending the ambition of the Limerick 2030 plan to include extension of the City Centre towards Limerick Docks;
- Identifying infill and regeneration opportunities to intensify housing and employment development;
- Enabling enhanced opportunities for existing communities as development and diversification occurs, particularly through employment, learning and education support;
- Progressing the sustainable development of new greenfield areas for housing and the development of supporting public transport and infrastructure, such as at Mungret;
- Provision of a Citywide public transport network, with enhanced accessibility from the City Centre to the National Technological Park, UL and Shannon International Airport;
- Development of a strategic cycleway network with several high capacity flagship routes;
- Enhanced road connectivity to Shannon Foynes Port, including local by-passes;
- Enhanced regional connectivity through improved average journey times by road to Cork and Waterford;
- Ensuring that water supply and wastewater needs are met by new national projects to enhance water supply and increase wastewater treatment capacity;
- Improving sustainability in terms of energy, waste management and resource efficiency, to include district heating and water conservation;
- The fast-track delivery of the Limerick Northern Distributor Road (LNDR) which is a strategic investment priority for the MASP;
- Enhanced connectivity to Shannon Foynes Port, including local by-passes;
- Development of a new business park on the north of the city accessible by public transport, linking with Limerick IT and Moyross to build on the regeneration progress;
- Supporting an application for the designation and subsequent development of the lands zoned as University in the Clare County Development Plan 2017-2023 as an economic Strategic Development Zone (SDZ);
- The continued expansion of Limerick City's third level institutions and the NUIG Shannon College of Hotel Management along with integration with the wider Metropolitan Area and Region;

- Creating a sustainable urban design town centre through the development of an Action Area Plan for Shannon Town Centre;
- Enable a digital and innovation economy and make this Ireland's leading smart Metropolitan Area;
- Develop a Connected and Autonomous (CAV) R&D testbed and put the Limerick-Shannon Metropolitan Area at the forefront of a global mobility revolution;
- Delivering a 55% level of non-car based transport in the Limerick-Shannon Metropolitan Area;
- The delivery of measures and infrastructure which will transition cycling and walking as the primary mode of transport within the Limerick-Shannon Metropolitan Area;
- Interconnecting and integrating walking and cycling infrastructure;
- Continue to develop workforce skills and talent and enhance the attractiveness of living and working in the Metropolitan Area;
- Protecting built and natural assets;
- Achieve a step-change in progress toward a low carbon economy;
- Managing flood and climate change risks.

4. Key Enablers for the Waterford Metropolitan Area

- The North Quays Innovation District has the potential to transform the City by extending the city centre across the river into a new integrated river side quarter with sustainable pedestrian and public transport links to the historic city centre;
- Development of Technological University for the South East (TUSE) to allow Waterford to advance as a modern European University City, supporting, innovation, creativity and enterprise in tandem with development of Waterford as a UNESCO Learning City;
- Continuing to build an attractive & vibrant city centre will give expression to Waterford's identity as a modern, dynamic, innovative European city, enhanced through public realm and urban amenity projects, focused on streets and public spaces creating a mixed use city centre with housing, retail and cultural life;
- Bridging the River Suir to develop new NorthSouth Connections and support development of the Concentric City – to be progressed in a compact and sustainable manner by the integration of land-use and transportation planning, expansion of public transport services and the extension of greenways and cycleways to link existing and planned urban neighbourhoods with one another and with the City Centre;
- Infill and regeneration opportunities – to be identified to intensify housing and employment development throughout city centre and inner suburban areas;
- Enhanced bus and rail public transport centred on a new transport hub located in the North Quays Innovation District and improved road/ rail network linking Waterford to Cork, Limerick, Dublin, Rosslare Europort and the East Coast will significantly improve inter-regional connectivity.
- Investment in infrastructure to realise the full potential of the Port of Waterford and Waterford Airport will boost international connectivity for the entire region
- Development of University Hospital Waterford (UHW) as a 24/7 Acute Hospital & promote Health Care to make Waterford a Healthy City
- Development of new Recreational Amenity & Green Infrastructure Spaces to create a Clean and Green City and Harbour for the expanded City.
- Delivering the North Quays SDZ regeneration project for integrated, sustainable development together with supporting infrastructure, including a new pedestrian bridge or a pedestrian/public transport bridge over the River Suir;
- 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 greenfield areas for housing and the development of supporting public transport and infrastructure;
- Development of the Link Road from Abbey Road to Belmont on the R711;
- Smarter Travel improvements to Abbey Road;
- Improvement of the N29 to enable employment growth at Port of Waterford, Belview;
- Public realm and urban amenity projects, focused on streets and public spaces, in the existing built footprint of the Metropolitan Area - North & South in support of urban intensification;
- Enhancement of the higher education infrastructure through the expansion and development of Waterford Institute of Technology in the context of the Technological University of the South East, aligned with plans for the Metropolitan Area and the wider region;
- Provision of Metropolitan wide public transport and strategic cycleway networks;
- Extension of the Waterford Greenway to link WIT to the City Centre and to the Greenway linking Waterford to New Ross;
- Enhanced regional connectivity through improved average journey times by road and rail to Dublin, Cork, Limerick and the region's ports;
- Ensuring that water supply and waste-water needs are met by new national projects to enhance Waterford's water supply and increase waste water treatment capacity;
- Improving sustainability in terms of energy, waste management and resource efficiency and water, to include district heating and water conservation.