



Tionól Réigiúnach  
an Deiscirt

Southern Regional  
Assembly

# Delivering Infrastructure for a Thriving Southern Region

Priorities for National Development Plan Review 2026 – 2035

Submission of the Southern Regional Assembly

June 2025



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# Summary Response to Consultation Questions

## 1. Name:

David Kelly, Director Southern Regional Assembly

## 2. Please indicate if you are submitting on behalf of an organisation and or as an individual:

Organisation

## 3. Name of organisation (if relevant):

Southern Regional Assembly

## 4. The Review of the National Development Plan will be focused to ensure that economic infrastructure can be prioritised to deliver 300,000 additional homes by 2030 and to support international competitiveness.

### A) In that context, which sectors should be a national priority for additional investment?

### B) Why should these sectors be a national priority for additional investment?

The Southern Regional Assembly has identified the following areas as key priorities for investment to enable the Region to fulfil its potential and objectives under Project Ireland 2040:

- Addressing **inadequacies in public transport** across the region and largest urban areas, with accelerated delivery of currently commitment projects including BusConnects, and a commitment to **projects of greater scale and ambition** including rail and light rail solutions.

- Realising the opportunity for accelerated delivery of proposals under the All Island Strategic Rail Review to deliver **substantial improvements in inter urban rail** connectivity across the Region up to 2030.
- A clear capital funding commitment to **progress the road projects necessary** to deliver 90 KPH average inter urban journey times, with a more flexible and agile funding approach to accelerate the progression of projects through pre implementation phases to being “shovel ready”.
- **Investment in our Ports** focused on enabling and benefiting from Off Shore Renewables, and recognising their increased importance in post-Brexit trade.
- Expanded support for all four **Regional Airports**, including recognition of the role and opportunity of Waterford Airport to support the wider South-East.
- Increased investment to address the **widespread deficiencies in water infrastructure** across the Region. Consideration should be given to giving greater opportunities and funding to local authorities to work with Uisce Eireann on delivering smaller scale infrastructure improvements and network expansion.
- Investment in our **energy and grid infrastructure**, recognising the substantial role of the Region in our energy security and net zero transition, as well as the need for localised upgrades to enable servicing of new development.



# Summary Response to Consultation Questions

## Response to Question 4 (Continued)

- Continue to build upon the impact of the URDF and RRDF in our Region, alongside **targeted investment in housing** to address the specific challenges faced in brownfield land activation and apartment development.
- Delivering the improvements in **healthcare and education** required to address current deficiencies and keep pace with the growth in population for our Region set out in the NPF. Alongside this, continued investment in our **third level institutions** to underpin our economic competitiveness.
- Investment in **green and blue infrastructure** to support our obligations and objectives for **nature restoration**, whilst providing the recreational amenities to enable our Region's liveability and high quality of life.
- Ensuring that objectives on **climate neutrality** are a core pillar prioritised across all sectors of capital investment, supported by the targeted investments necessary to **protect our communities** and critical infrastructure from the impacts of the climate change.
- **Establish a dedicated long-term financing mechanism for local authorities**, who should no longer be made to compete against each other for access to scarce funding to advance national and regional objectives.
- **Effective delivery and implementation mechanisms for metropolitan areas** should be established to advance their development in accordance with national policy.

## 5. In the context of the need to boost the delivery of infrastructure, what trade-offs and constraints should the government be aware of and how should these be managed as part of the Review of the National Development Plan?

The National Development Plan sits alongside the National Planning Framework to form Project Ireland 2040, an overarching strategy to address the significant spatial, societal, economic and environmental issues facing Ireland. The Southern Regional Assembly strongly supports the process and is committed to playing its role in ensuring its successful implementation.

A fundamental objective of Project Ireland 2040 is overcoming the 'business as usual' approach and shifting the trajectory of growth to a 50:50 distribution between the Eastern & Midland Region and the Southern and Northern & Western Regions. The Southern Regional Assembly supports this approach as a positive, credible, reasonable and viable proposition which provides a sustainable basis for all three regions together to harness their potential.

The Southern Region has significant attributes to support this approach and to make it work. However, our fundamental concern is that since the inception of Project Ireland 2040, the NDP has not coherently aligned with NPF policy.

# Summary Response to Consultation Questions

## Response to Question 5 (Continued)

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.

The Southern Region has pronounced infrastructure deficits, with the EU's Regional Competitiveness Index placing it within the bottom 15% of Regions across Europe with regards to infrastructure. Infrastructure is a core competitive weakness for the Region when compared to both European peers and the Eastern and Midland Region.

Analysis undertaken by the Assembly shows significant and embedded nonalignment between policy and investment. Despite accounting for 33% of current population and future growth to 2040, the Region only accounts for 17% of planned investment under the current NDP. If funding for the Southern Region were proportional to that committed to the Eastern and Midland region, this would result in an additional €14 billion (120%) in planned capital expenditure.

**The Revised National Development Plan should be strengthened significantly to address the current lack of alignment between the objective for Regional Parity and the structural and funding model required to achieve it.**

**6. Government has been communicating on National Development Plan delivery in several ways, including through the Project Ireland 2040 Interactive Map and Tracker, and the Project Ireland 2040 Annual and Regional Reports.**

**How can government best communicate the National Development Plan?**

As set out in response to Question 5, analysis undertaken by the Southern Regional Assembly has identified a significant regional imbalance in planned investment under the current NDP and Project Ireland 2040 Capital Investment Tracker.

This demonstrates that the NDP has not aligned with or supported NPF objectives for regional parity, nor has it sought to address the more pronounced infrastructure deficits evident in the Southern Region. **The Project Ireland 2040 process will not succeed unless this is addressed.**

Current processes for monitoring and communicating the NDP as outlined in Question 6 have failed to effectively identify this funding imbalance, with a focus on quantifying projects rather than the actual scale of investment.

**There is a clear need for more robust arrangements for monitoring the alignment of planned infrastructure investment under the NDP with objectives of the NPF.**

## Overview of the Southern Regional Assembly

This is the submission of the Southern Regional Assembly to the Consultation on the National Development Plan Review for 2026 – 2035. The purpose of the submission is to assist Government in ensuring that the strategic priorities for Region are fully considered in the revised NDP so that the Region can realise it's full potential and deliver upon the objectives set out as part of Project Ireland 2040.

The Southern Regional Assembly has a specific interest in the NDP Review and planned capital expenditure 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, Tipperary, Waterford and Wexford, the Assembly has the following formal functions under the Local Government Reform Act 2014:

- The formulation, adoption, and implementation of Regional Spatial and Economic Strategies (RSES). The Assembly published the first RSES for the Southern Region in 2020, including Metropolitan Area Strategic Plans (MASPs) for Cork, Limerick-Shannon and Waterford.
- Management of EU regional programmes, 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.
- Facilitation and provision of assistance to local authorities in engaging with EU institutions on matters related to regional and local development.
- 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

# The NDP, NPF and Project Ireland 2040

## Infrastructure in Delivering Balanced Regional Development

### Project Ireland 2040

The Southern Regional Assembly has an important statutory and democratic role in the implementation of Project Ireland 2040 and has a strategic interest in its success. We strongly support the process, and its potential to address the significant spatial, societal, economic and environmental issues facing Ireland, and are committed to playing its role in ensuring its success.

The National Development Plan (NDP) sits alongside the National Planning Framework (NPF) as the two core pillars which form Project Ireland 2040. A critical component of the process is the alignment of capital expenditure under the NDP with the spatial, economic, environmental and broader societal objectives of the NPF.

A fundamental objective of Project Ireland 2040 is overcoming the 'business as usual' approach and shifting the trajectory of growth to a 50:50 distribution between the Eastern & Midland Region and the Southern and Northern & Western Regions.

The Southern Region has significant attributes to support this approach and to make it work. **However, our fundamental concern is that since the inception of Project Ireland 2040, the NDP has not coherently aligned with NPF policy.**

### Regional Spatial and Economic Strategy (RSES)

The key statutory function of the Southern Regional Assembly is the preparation and implementation of the Regional Spatial and Economic Strategy (RSES) for the Southern Region. The RSES serves as a framework for sustainable development, guiding how our region evolves economically, socially, and environmentally.

The current RSES was adopted in 2020. With the recent adoption of the Revised NPF, the SRA will be required to commence work on a review or replacement of the RSES before the end of 2025.

To realise the vision of the RSES, the Regional Assembly collaborates closely with local authorities and state agencies on various strategic initiatives that aim to create a more connected, resilient, and sustainable region. A critical aspect of this is capital investment in strategic infrastructure. This is reinforced in the new Planning and Development Act 2024, with future strategies required to set out priorities for infrastructure of scale, and to make provision for the coordination of cooperation for effective implementation of these priorities.

**The alignment of planned capital investment is critical to the successful implementation of the RSES.**



# The Southern Region in a European Context

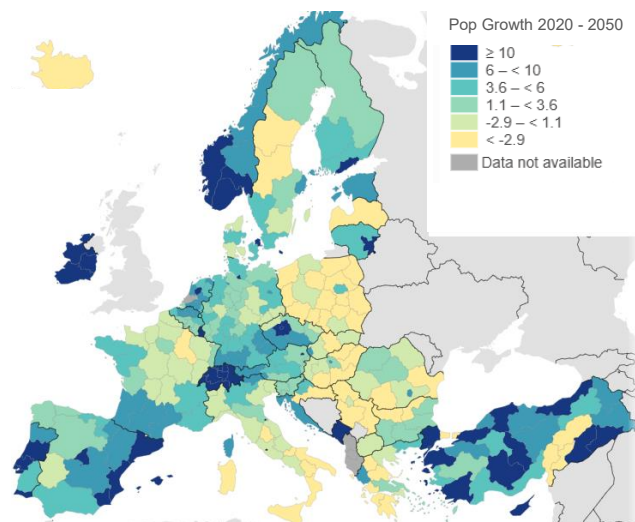
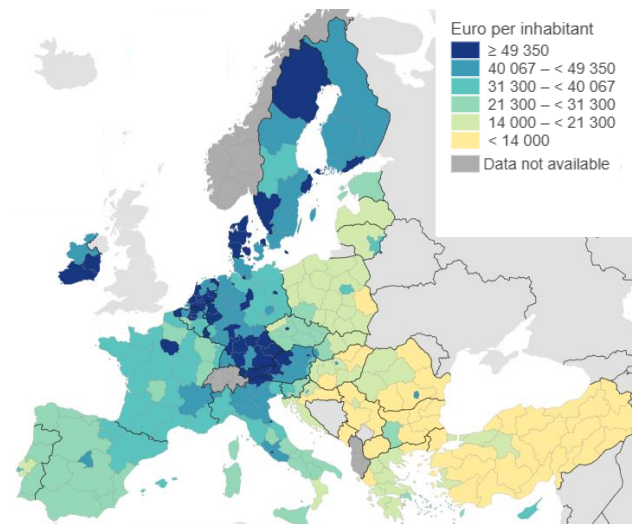
## A strong regional economy set for significant growth

### The Southern Region is one of the best performing economies in Europe.

Evidence from Eurostat demonstrates that the Southern Region had the third highest recorded GDP per capita of all 242 assessed NUTS 2 Regions in 2023. The Southern Region also had the fifth highest labour productivity of EU countries.

Findings from the CSO demonstrates that in a national context, GDP per capita for the South-West is just 1.6% behind Dublin at €162,832. The Mid-West accounts for €64,496 per capita, and the South-East €43,500 per capita.

**This highlights the exceptional economic performance of the Southern Region in a National and European context,** and the importance of the Region to the overall economic performance and resilience of the State.



Ireland is one of the few countries in Europe, and indeed across much of the OECD, which is set to witness significant levels of population growth in the coming decades. While much of this projected growth is due to economically influence migration, it is underpinned by a high level of natural increase.

The Southern Region is projected to witness one of the highest levels of population growth from 2020 to 2050 across 31 EU and EFTA States, **and are amongst the top 2% of regions for project population growth to 2050.**

It should be noted that these projections do not account for NPF's objective for regional parity (50:50 split), which would result in even higher rates of growth for the Southern Region, and particularly for the with the three Cities of Cork, Limerick and Waterford each identified for targets of at least 40% growth from 2022.



# The Southern Region in a European Context

## Infrastructure as a Core Competitive Disadvantage

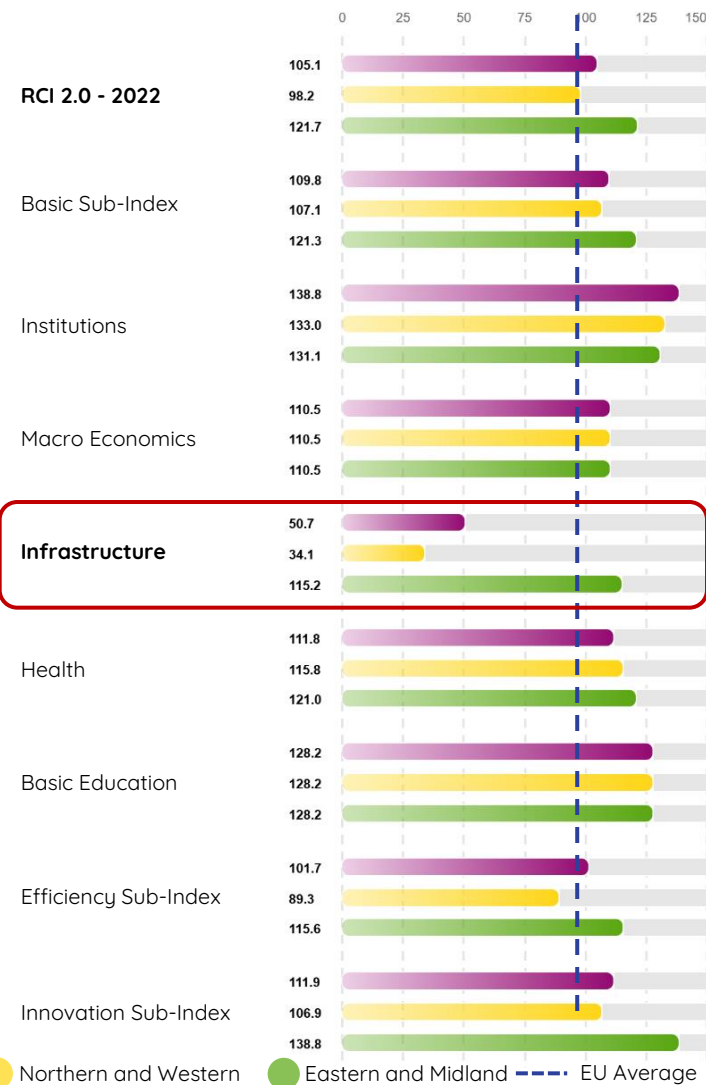
The European Commission's Regional Competitiveness Index (RCI) measures the major factors of competitiveness for regions across the European Union. The Index is made up a set of indicators which identify the ability of a region to offer an attractive environment for firms and residents to live and work.

The Southern Region has an overall index of 105.1, ranking it 94th out of 234 regions in the EU, and classifying it as a "more developed region". The Southern Region ranks higher than the Northern and Western Region (98.2), but noticeably lower than the Eastern and Midland Region (121.7).

The Southern Region places particularly strongly with regards to education, strength of the labour market and technological readiness. **However, with regards to infrastructure, the Southern Region ranks in the bottom 15% of all 234 regions across the EU 27, with a scoring of 51.** By comparison, the Eastern and Midlands regions ranks significantly above the EU average at 115.

**In summary, despite having one of the highest GDP per capita of all assessed European regions and having one of the highest levels of projected population growth to 2050, the Southern Region ranks as one of the lowest in Europe with regards to infrastructure.**

Infrastructure is the fundamental competitive weakness to the sustainable economic success of the Southern Region, and to its overall quality of life and general attractiveness. In a National context, the evidence also highlights that infrastructure deficiencies are significantly more pronounced in the Southern Region compared to the Eastern and Midland Region.



# National Development Plan 2021 – 2030

## Project 2040 and Alignment of Capital Investment with NPF

A central component of Project Ireland 2040 is the alignment of capital investment 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).

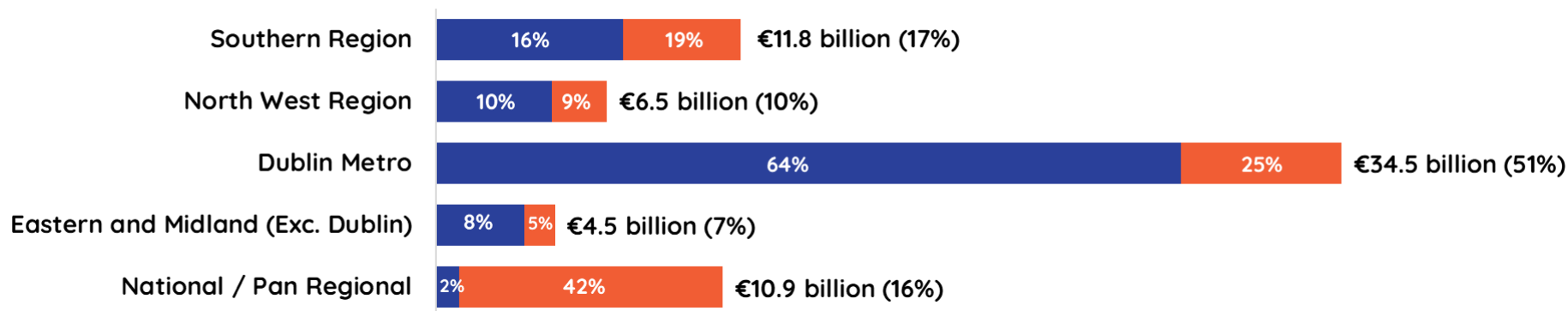
The Department of Public Expenditure NDP Delivery and Reform (DPENDR) has responsibility for oversight and delivery of the NDP. DPENDR have noted as part of the RSES monitoring process that it has responsibility for allocating expenditure on a departmental, and not on a geographic basis. It is also responsible for ensuring that individual projects satisfy the requirements of the Infrastructure Guidelines, and that individual departments are responsible for ensuring that their spending priorities are aligned with the NPF.

The NDP is primarily monitored through the Project Ireland 2040 Capital Investment Tracker and Map. While 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, **research undertaken by the SRA has identified a significant imbalance in the actual quantum of planned investment.** On a regional basis, €11.8 billion (17%) of planned investment is for projects within the Southern Region, compared to €34.5 billion (51%) for projects within the Dublin Metropolitan Area.

it is notable that the imbalance in planned investment is more pronounced for projects at pre-implementation phase, where the Dublin Metropolitan Area accounts for 64% of total planned investment.

### Share of Overall Planned Investment under Current NDP

■ Pre-Implementation ■ Post Implementation / Completed



Source: Project Ireland 2040 Capital Investment Tracker (April 2025), SRA Analysis. Cost based upon cost categories, or latest public projection for major projects



# National Development Plan 2021 – 2030

## Regional Balance of Planned Capital Expenditure

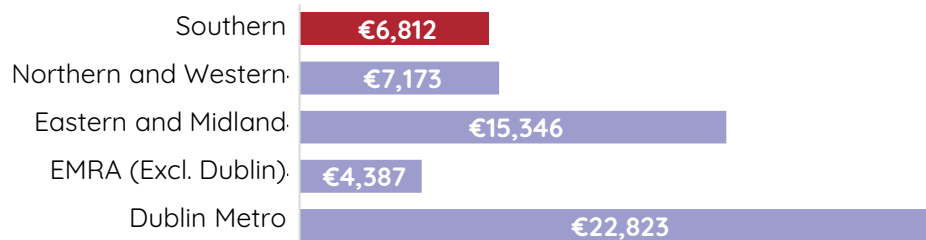
### Share of Planned Investment in Metropolitan Areas



When planned investment in the five metropolitan areas is assessed, Dublin accounts for 79% of total funding. This is despite the fact that the other four Cities are targeted to grow at almost twice the rate of Dublin up to 2040.

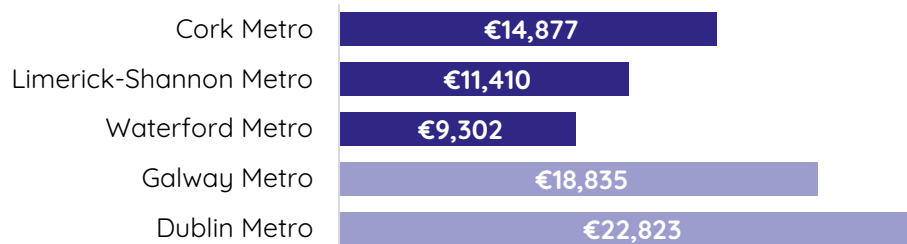
The regional imbalance on planned investment is clearer when assessed on a per capita basis, with €6,800 per capita for the Southern Region compared to €15,300 for the Eastern and Midland Region. There is a similar disparity across Metropolitan Areas, with per capita investment substantially higher in Dublin than our other Metropolitan Areas.

### Planned Investment Per Capita



If funding for the Southern Region were proportional to the Eastern and Midland region, **this would result in an additional €14.4 billion in planned capital expenditure**. If funding for our three Metropolitan Areas were proportional to the Dublin Metro, **this would result in an additional €5 billion**.

**This evidence clearly demonstrates that the NDP has not been aligned with the NPF objectives for regional parity nor has it sought to address the more pronounced infrastructure deficits evident in the Southern Region.**



# National Development Plan 2021 – 2030

## Current Status of Key Projects

An overview of the largest planned and committed investments across the State highlights the impact of major projects of scale. A number of strategic projects for the Region have been implemented or progressed under the current NDP, addressing significant gaps in the Region's infrastructure provision.

### Completed / Implementation Phase

- Completed Road Projects since 2019 (€1.2 billion)
- M28 Cork to Ringaskiddy (€ 456 million)
- N21/N69 Adare to Foynes (€450 million)
- Water Infrastructure – Various (€389 million)
- Cork Commuter Rail Phase 1 (€290 million)
- Limerick Regeneration Programme (€250 million)
- Waterford North Quays (€207 million)
- Housing Projects – Various (€105 million)

### Pre-Implementation Phase

- M20 Cork to Limerick (€ 2 billion)
- BusConnects Cork, Limerick, Waterford (€ 1.3 billion)
- Cork Commuter Rail Phase 2 (€840 million)
- New/Upgraded Hospitals (€700 million)
- Water Infrastructure – Various (€665 million)
- Cork Docklands (€471 million)
- Higher Education Facilities (€350 million.)
- Housing Projects – Various (€180 million)

However, the nature and scale of projects within the Dublin Metropolitan Area represents a level of ambition which is not reflected across current capital spend commitments for the Southern Region.

### Completed / Implementation Phase

- BusConnects Dublin (€4 billion)
- Housing Projects – Various (€2.5 billion)
- Dublin City Port Masterplan (€1.6 billion)
- Further and Higher Education (€855 million)
- Ringsend Treatment Plant (€550 million)
- Dublin Airport North Runway (€320 million)

### Pre-Implementation Phase

- Metro Link (€ 9.5 billion)
- Eastern and Midlands Water Supply (€5 billion)
- Dart + (€ 3 billion)
- Major Hospital Projects\* (€ 1.5 billion)
- Cultural and Sporting Infrastructure (€1.3 billion)
- Housing Projects – Various (€950 million)
- Greater Dublin Drainage Scheme (€750 million)
- Luas Finglas (€600 million)



# National Development Plan 2021 – 2030

## Current Status of Key Projects

There are several proposed projects of scale within the Southern Region which are not committed to within the current NDP, in addition to a range of localised infrastructure priorities across the Region. While there has been some varied progress on the feasibility and design of projects, their omission from the current capital spending programme has resulted in significant delays and uncertainty.

A clear commitment to projects of this type under the Revised NDP will help to address the significant funding imbalance which exists under the current NDP.

**If Project Ireland 2040 is to be a success, it is essential that the Revised NDP includes commitments to delivering the projects of scale in the Southern Region required to realise the potential and opportunity that exists.**

**This needs to be supported by effective arrangements for monitoring and oversight of investment, which ensure that planned investment is in line with NPF objectives and is addressing the profound disparity in infrastructure deficiencies across Regions.**

### **Projects Without a Clear Commitment to Capital Funding Under the Current NDP Capital Investment Tracker**

- Regional and Intercity Rail Network (AISRR)
- Cork Luas
- Limerick Suburban Rail Network
- Cork City Northern Transport Project
- Limerick Northern Distributor Road
- N24 Cahir to Limerick Junction
- N24 Waterford to Cahir
- N11 / N25 Oilgate to Rosslare
- N25 Upgrades (Cork to Waterford)
- N25 Waterford to Glenmore
- N22 Killarney to Foynes
- Orbital / Relief Roads for Towns across the Region
- Eastern River Suir Crossing, Waterford City
- Waterford Airport Upgrades
- Upgrades / Replacements to Major Hospitals
- Investment in Further and Higher Level Education Facilities (various across institutions)
- Water infrastructure (various across the region)

*This is not a definitive list of potential projects in the Region, and full consideration should be given to specific priorities identified by local authorities and other stakeholders.*

## Public Transport and Sustainable Mobility Infrastructure for Modern European Cities of Scale

Delivering a network of high-quality public transport and active travel infrastructure in the Region is critical to lead the modal shift necessary to achieve our climate action targets and improving quality of life and economic competitiveness.

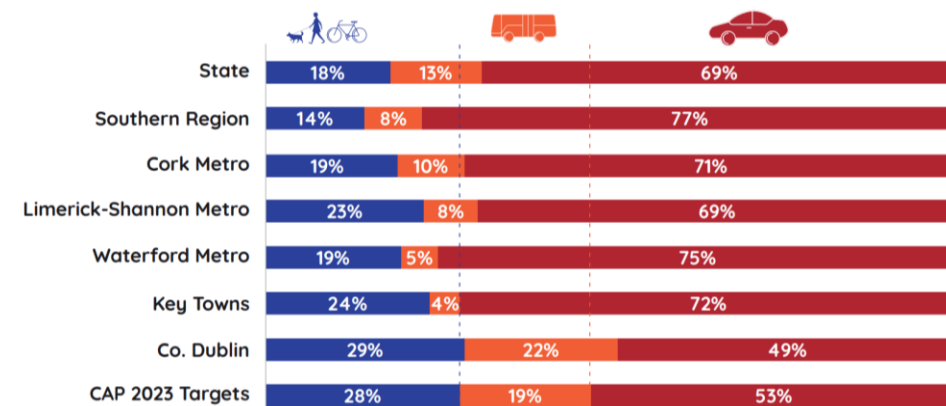
### Public transport provision represents one of the most significant aspects of the Region's infrastructure deficit.

This is a particular weakness for our three Metropolitan Areas, where the level of car dependency is significantly higher than is the case of the Greater Dublin Area.

A number of key projects have the potential to have a transformative impact. A core pillar will be BusConnects across our three Cities, which will deliver significantly improved bus services, and improved infrastructure for bus and active travel across our three Metropolitan Areas. Continued expansion of urban bus services across our larger towns, and of TFI Local Link, will support increased public transport use in the wider region. Investment in active travel, including both urban and interurban greenways, and multi modal corridors is also critical in supporting modal shift.

**However, this needs to be supplemented by high-capacity public transport solutions, including rail and light rail, for our Metropolitan Areas.** This was reaffirmed by the recent report *Cost of Congestion in our Regional Cities* which found that planned interventions will not be sufficient to mitigate the increased congestion projected up to 2040.

### Modal Share of Travel, Census 2022



In Cork, progress on the Cork Area Commuter Rail programme, and publication of the emerging preferred route for the Cork Luas, presents an opportunity for transformative changes for entire Metropolitan Area.

Similar proposals for Limerick and Waterford are less advanced, with a stronger commitment required from stakeholders to progress solutions. This includes the potential of the Limerick-Shannon Commuter Rail network, and spur serving Shannon Airport.

The expansion of high-capacity public transport services in our Metropolitan Areas is also essential to enable opportunities for Transport Oriented Development (TOD), which is recognised in NPO 10 and NPO 97 of the NPF.



# Public Transport and Sustainable Mobility

## Potential for Accelerated Improvement Regional Connectivity

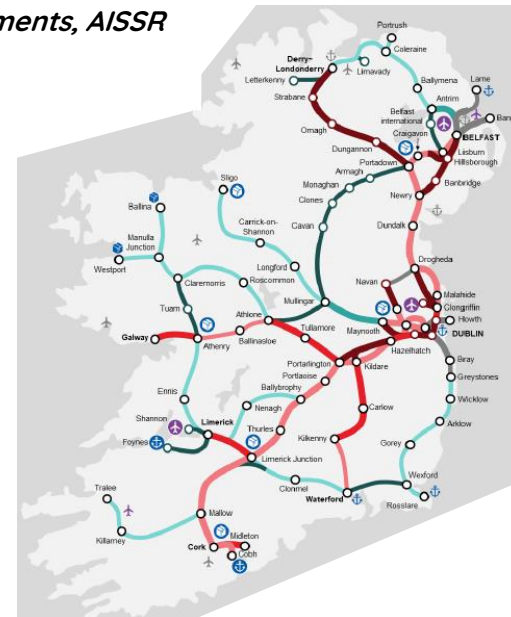
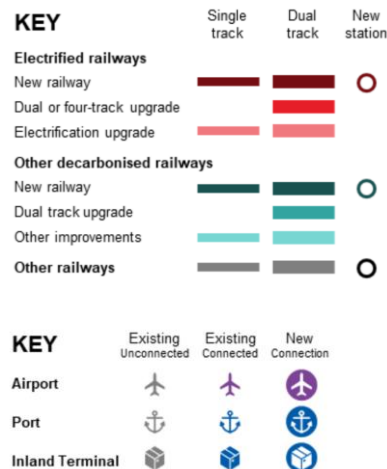
Across the wider region, despite reasonable connectivity to Dublin from many areas, inter-urban services within region are wholly inadequate. As a result, there is an overwhelming reliance on car journeys for travel across the Region.

The All Island Strategic Rail Review (AISRR) includes a series of proposals which, combined, would result in a substantial improvement in rail connectivity within the Region, in addition to the wider island. Crucially, this would result in more regular services, and significantly reduced journey times which compared positively to car journey times.

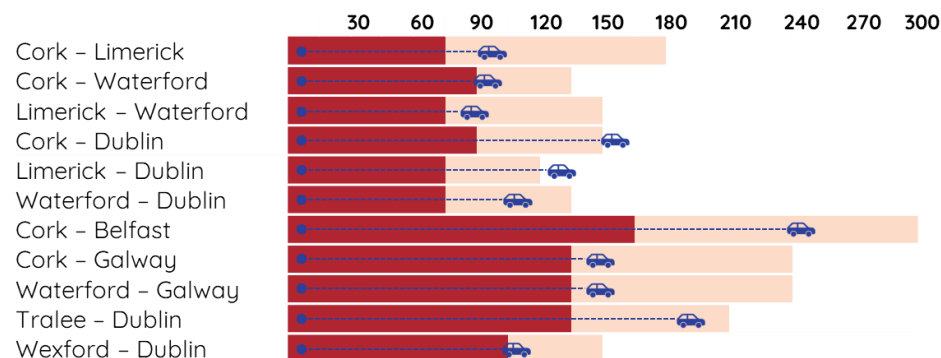
**Accelerated implementation of projects identified in the AISRR represents an opportunity for transformative improvement in regional connectivity, and increased share of public transport use, up to 2030.** Upgrades to existing rail infrastructure can be delivered in a much faster timeframe than major road projects, with less risk arising from the planning process or environmental impact.

Notwithstanding the potential of AISRR, the SRA are concerned that the proposals for the Southern Region do not match the ambition and scale envisioned for other Regions, and that additional opportunities should continue to be explored to expand the rail network across the Region.

### Proposed Network Improvements, AISRR



### Estimated Journey Time Improvements, AISRR



### Improving Inter-urban connectivity and enabling growth

While the three Cities of the Southern Region, and many of our large towns, have strong road connectivity to Dublin, **inter-urban road connectivity within Region itself represents a critical structural weakness.** Together with deficiencies in our rail network, this fundamentally undermines the Region's collective ability to act as an economic counterbalance to Dublin.

This is recognised in NSO 2 of the NPF, which aims for an average inter-urban journey time of 90 kph. For this to be achieved, progress is required on several key projects across the National Road network, including key corridors which form part of the European TEN-T network.

Some major road projects are at an advanced design stage, with planning applications set to be submitted for the M20 and N24 (Cahir to Limerick Junction), in 2025. It is crucial that accelerated progress is made on these projects once planning approval is granted, with clear commitment to capital funding.

Other projects are at an earlier stage of design and feasibility. Considering the timeframes for delivering major road projects, it is crucial that funding is committed to progress these projects through pre-implementation phase, so that they can benefit from capital investment within the timeframe of the new NDP.

In our cities, towns, and villages, investment in orbital road infrastructure is required to reallocate space within our urban cores, and to unlock areas for strategic, plan led growth and support delivery of at least 40% of future housing development within the existing 'footprint' of built-up areas. This includes multi-modal northern distributor projects in both Cork and Limerick, and objectives for relief roads and an eastern river crossing in Waterford.

A number of settlements throughout the Region are struggling with congestion from national roads passing through main streets and town centres, and are awaiting progress on relief roads or bypass projects. Such projects are required not just to support more efficient operation of the national road network, but to enable regeneration and revitalisation of our town centres.

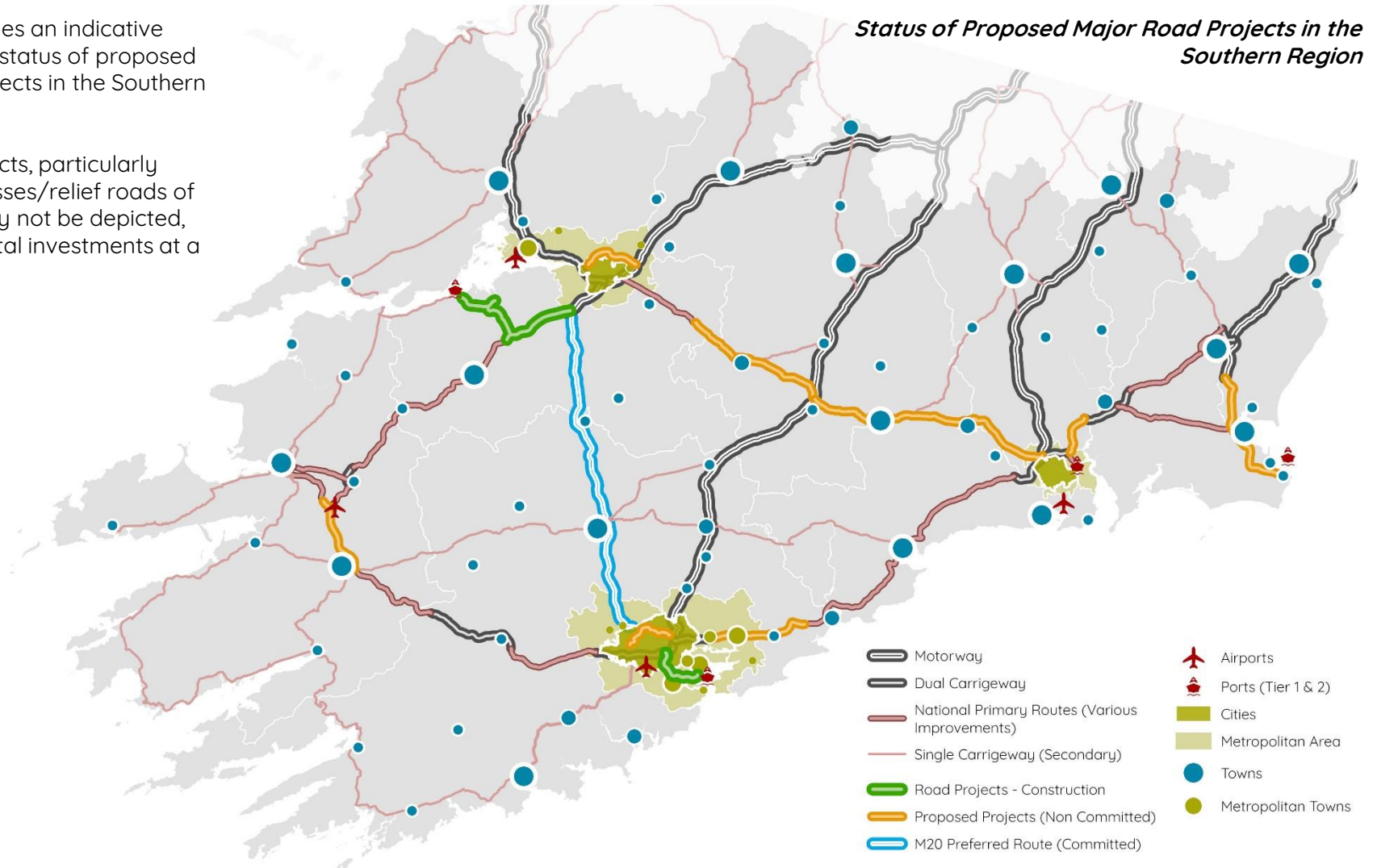
The absence of a multi annual funding model has been noted as major obstacle to the timely and efficient progress of many road projects. This has resulted in stalled or delayed progress on projects which clearly contribute to the NPF objectives for much improved inter-urban connectivity and town centre renewal.

**The NDP should enable a more agile and flexible approach to advancing design, feasibility and planning of variety of road projects required across the Region.**

## Improving Inter-urban connectivity and enabling growth

This map provides an indicative overview of the status of proposed major road projects in the Southern Region.

Additional projects, particularly proposed bypasses/relief roads of settlements, may not be depicted, but represent vital investments at a local level.





### The Importance and Opportunity of our Ports and Airports

As an island nation, **Ireland's ports and airports are key national infrastructure assets** and perform an indispensable role in facilitating the movement of both people and goods.

The Southern Region contains four of Ireland's five Tier 1 and Tier 2 Ports. Ports in particular play key roles in energy security and associated green industrial development, food security, cyber security, tourism, and supporting coastal and island communities. Their importance to the All-Island economy has been increasingly evident in the post BREXIT period.

The Programme for Government and First Revision to the National Planning Framework (NPO 50 and NPO 51) both seek the upgrade of ports to realise the economic potential of facilitating renewable energy projects and recognise this can support balanced regional development.

A 2024 report commissioned by the Southern Regional Assembly on 'The Economic Impact of Southern Region Ports' highlighted that the largest barrier to the successful delivery of offshore wind is preparing the ports in the Southern Region for the assembly and installation phase. This will require the ports to finance large investments, but they do not have sufficient funds to do so themselves and there is also uncertainty associated with demand.

The Revised NDP must set out a clear approach to funding the necessary upgrades to the Region's Ports to facilitate ORE projects, in addition to other key development and infrastructure proposals highlighted in the RSES, including:

- Support investment in the transition to smart technologies of port and harbour assets.
- Support the achievement of Tier 1 status for the Ports of Waterford and Rosslare Europort.
- Supporting the implementation of Masterplans and Strategic Visions for the development of Cork, Shannon Foynes, Waterford and Rosslare Ports.
- Continued commitment and investment in the necessary road and rail connections to our Tier 1 and Tier 2 Ports.

Capital investment in our Region's Airports – Cork, Shannon, Kerry and Waterford – is critical to support, sustain and enhance resilient international connectivity, which is a necessity in the face of increasing geopolitical change and uncertainty.

The RSES supports continued exchequer assistance for regional airports under the Regional Airports Programme and extension of the programme to all airports under 3 million passengers as permissible under EU guidelines. **It is recommended that programme supports are provided for all eligible airports in the Southern Region.** Funding is also sought for Waterford Airport, which was omitted from the programme this year, to enable a return of passenger services for the South East.

# Water Infrastructure

## Addressing deficiencies and enabling growth

**Constraints in both water supply and wastewater treatment represents one of the biggest obstacles to increased housing delivery and economic growth in the Southern Region.**

The largest investment in water infrastructure in the Southern Region is the Eastern and Midland Water Supply Project. The Southern Regional Assembly supports this project and recognises how crucial it is to ensure a secure water supply for the Greater Dublin Area.

However, it is important to emphasise the scale of deficiencies that exist in water infrastructure in settlement across the Southern Region. This includes numerous settlements where there is complete restriction on new development due to a lack of capacity in water supply and/or wastewater treatment facilities. Many other settlement only have potential capacity to support projected growth up to 2033.

An additional factor which is restricting housing delivery where capacity does exist in terms of treatment, network expansion is required to enable the delivery of housing on zoned and otherwise serviced sites.

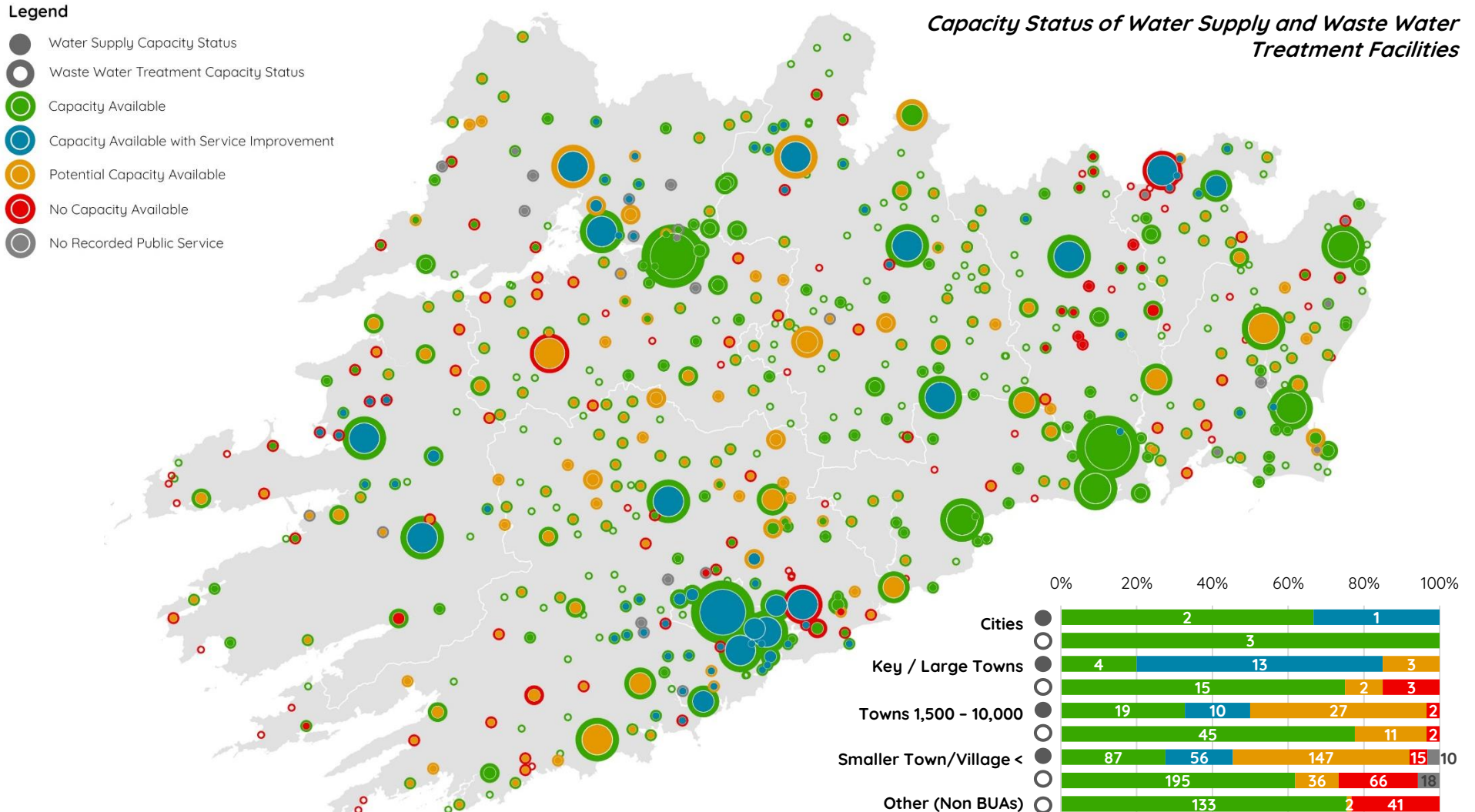
As a result of the widespread deficiencies in water infrastructure provision, there is increasing pressure on planning authorities to allow for developer provide/on-site solutions for wastewater treatment to enable housing delivery. This is a highly unsatisfactory solution, which in the past has resulted in substandard and poorly managed facilities with significant negative environmental outcomes.

Consideration should be given to expanding opportunities and funding for our local authorities to deliver water infrastructure improvements in appropriate circumstances, in partnership with Uisce Eireann, particularly in relation to network expansion and smaller scale treatment facilities. This would allow local authorities to respond flexibly to local priorities and challenges, including opportunities for new housing and economic development.

The establishment of the Housing Infrastructure Services Company (HISCo), a commercial joint venture between the Ireland Strategic Investment Fund (ISIF) and Cork County Council, demonstrates the potential for innovative approaches to addressing our infrastructure challenges.

# Water Infrastructure

## Addressing deficiencies and enabling growth





# Energy Resources and Grid Infrastructure

## Supporting Energy Security and Achieving Net Zero

### The Southern Region will play a central role in Ireland's energy security and transition to a low carbon future.

A renewables-led system is at the core of Ireland's plan to radically reduce emissions within the electricity sector, whilst also protecting our energy security and ensuring economic competitiveness. The national Climate Action Plan 2024 (CAP 24) sets renewable energy targets to 2030 which consists of 9GW onshore wind, 5GW of offshore wind, and 8GW solar (2.5GW of new non-utility solar) as well as green hydrogen production from renewable electricity surplus generation.

The Southern Regional Assembly has been tasked with developing a Regional Renewable Energy Strategy (RRES) as part of the overall RSES process as set out under NPO 74 of the revised NPF. The RRES will play an important role in the allocation of onshore wind and solar renewable energy targets to the Southern Region's constituent local authorities.

The Southern Region will shoulder much of the responsibility for onshore wind and solar under the NPF targets, **including 40% of national onshore wind capacity, and 43% of national Solar PV capacity**. This will help to ensure that our legally enshrined national climate objectives, and our legally binding obligations of a reduction in green house gas (GHG) emissions of 51% by no later than 2030, are delivered.

Investment in offshore renewable energy development is crucial for decarbonisation, and for the State to harness its vast marine resources, whilst also fostering opportunity for economic growth and relevant industry job creation. Investment through the NDP in offshore renewable energy is especially pertinent in the Southern Region, where there is an extensive coastline which presents a unique opportunity for the Southern Region to develop as a hub for renewable innovation and sustainable industry.

The South Coast DMAP, adopted in 2024, is Ireland's first ORE DMAP, with four maritime areas identified as locations for future ORE. The first area, Tonn Nua, has the potential for 900MW and will be subject to auction later in 2025.

Key to the delivery of this renewables-led electricity system is the **delivery of a safe, secure and reliable electricity network**. This will warrant significant investment not just to enhance the electricity grid in order to accommodate renewable energy, but to achieve the ambition set out under the NPF for projected population growth and employment for the Southern Region. This is also of significant importance for energy security as we transition to a more sustainable electricity supply and carbon neutral energy system. Long-term energy security will necessitate timely investment to supply energy in line with the anticipated economic growth and environmental needs of our Region.

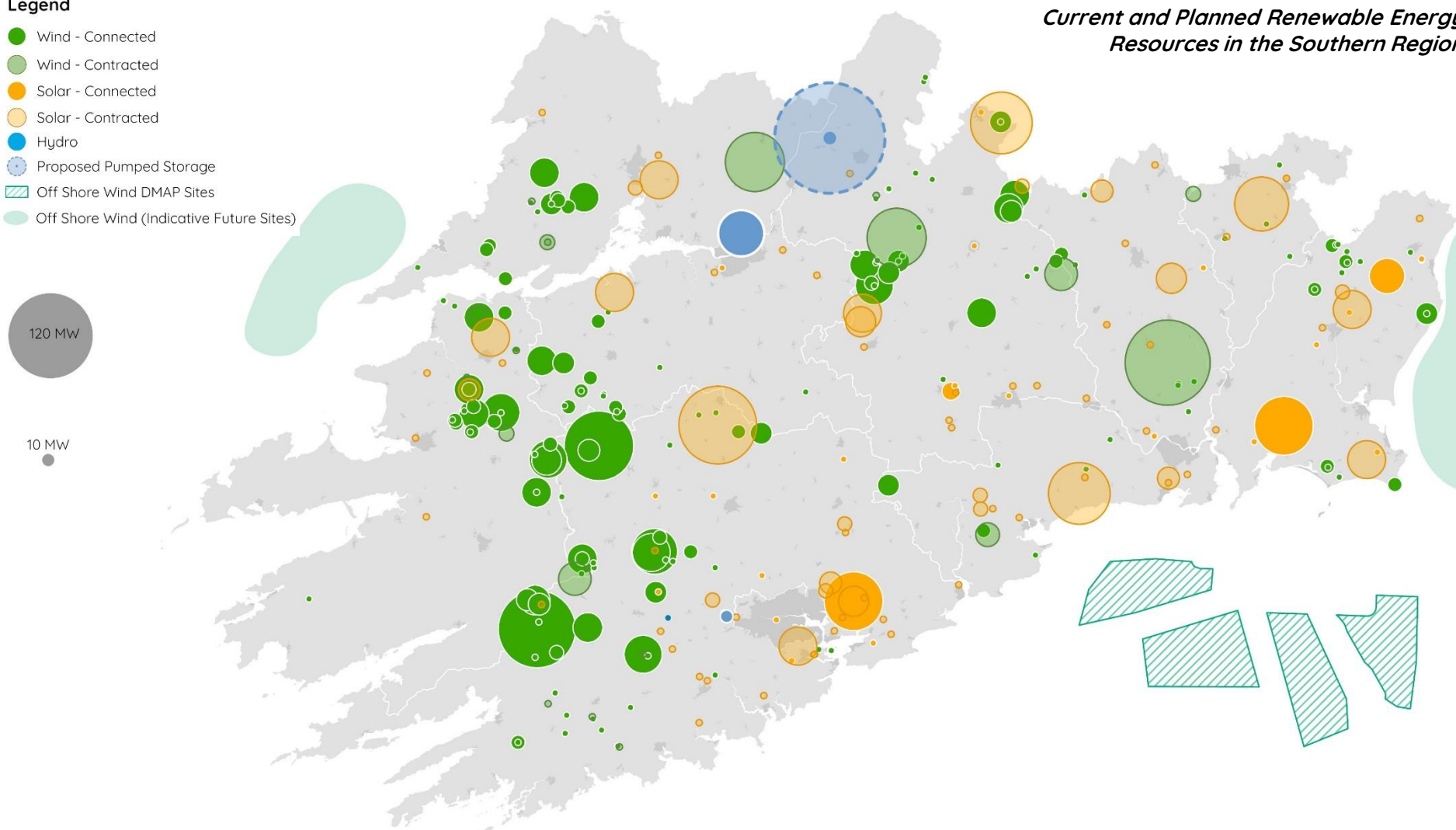
# Energy Resources and Grid Infrastructure

## Supporting Energy Security and Achieving Net Zero

### Legend

- Wind - Connected
- Wind - Contracted
- Solar - Connected
- Solar - Contracted
- Hydro
- Proposed Pumped Storage
- ▨ Off Shore Wind DMAP Sites
- Off Shore Wind (Indicative Future Sites)

### Current and Planned Renewable Energy Resources in the Southern Region



Source: SEAI Wind Atlas, SEAI Solar Atlas, Q4 2024, MARA

# Housing and Urban Regeneration

## Benefits of Focused Investment in Renewal of Urban Areas

The Southern Region, and Cork in particular, has benefited proportionally more than other parts of the Country from the allocation of URDF funding, with €821 million allocated to projects across the Region. Investment to date has enabled accelerated delivery of major projects including the Waterford North Quays, Opera Square, Grand Parade Quarter and Abbey Quarter. €375 million towards the Cork Docklands represents the single largest allocation under the URDF. For smaller settlements and rural areas, the RRDF has played a key role in advancing projects which support our rural communities, and the revitalisation of our rural towns and villages.

**This demonstrates the benefit of funding programmes that are explicitly linked to the strategic objectives of the NPF.**

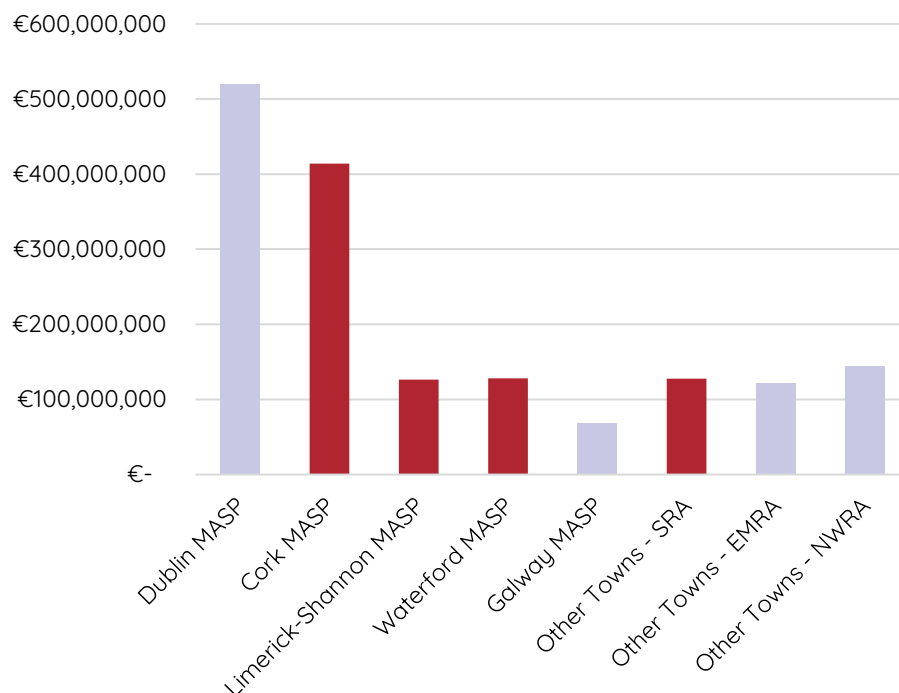
Despite this, the Regional Assembly are of the view of that projects which have been specifically identified by Government as being of strategic importance to delivering Project Ireland 2040 should not be required to enter a competitive process for funding. **Establishing dedicated funding programmes under the NDP for projects of scale and strategic importance** would provide the funding certainty and flexibility required to deliver a complex programme of regeneration projects.

It will also be important to ensure that a particular emphasis is placed on funding opportunities for Urban Areas which have seen limited funding allocations under current programmes.

### Regional Distribution of URDF Funding Allocations



### Distribution of URDF Funding Allocations Across Cities and Towns





# Housing and Urban Regeneration

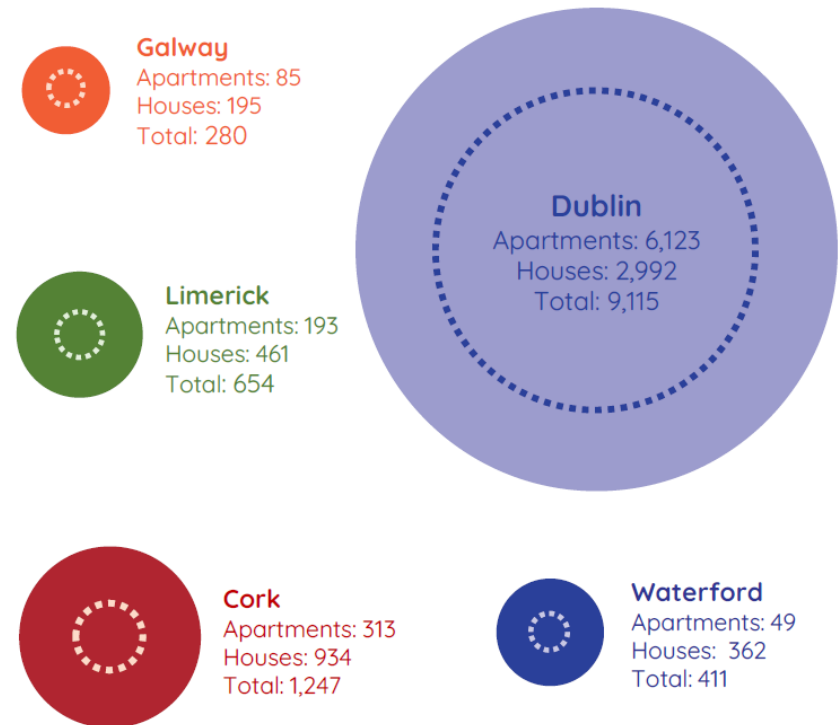
## Accelerating Housing Delivery and Compact Growth

The SRA supports the Government's ambition to prioritise investment which enables significantly increased housing delivery. Our recent report, *Housing Delivery in the Southern Region*, highlighted that viability of higher density residential development of brownfield land as a major issue restricting increased housing output. Whilst the challenge is nationwide, the shortfall has been significantly more pronounced in our Cities outside of Dublin, due to lower levels of planning activity and more challenging viability.

In Cork, Croí Conaithe (Cities) and Project Tosaigh have enabled a major increase in apartment construction in 2024, which was a key factor in a four fold increase in housing commencements in 2024. However, apartment delivery in Limerick, Waterford, and other our larger towns remains well below what is required to deliver on targets.

Apartment delivery and brownfield land activation is a critical part of delivering NPF's objective for sustainable compact patterns of growth. Research from the Housing Commission also noted an additional public cost of up to €137,000 per unit for new homes delivered in green field developments outside of existing urban areas when compared to new homes within our existing urban areas.

### Housing Delivery in Cities and Suburbs in 2024



**It is critical that planned investment in housing seeks to address these issue. Focused investment which accounts for the significant regional variance in development viability is required to enable the large scale delivery of high density housing on brownfield land in our major urban centres.**

## Education and Healthcare Underpinning Quality of Life and Opportunities

**The provision of high-quality Education and Healthcare will be fundamental to sustaining a strong and resilient economy and to ensuring a good Quality of Life for all citizens across the Region.**

Evidence from the OECD in their report *Towards Balanced Regional Attractiveness in Ireland - Enhancing the Delivery of the National Planning Framework*, highlighted the importance of investment in these sectors to address marked regional disparities.

Significant capacity pressures are being experienced in critical social infrastructure facilities including hospitals and schools across the Region. Capital Expenditure allocations in the NDP must seek to address these deficiencies, whilst also ensuring that the growth in population for our Region, and its Cities and Key Towns, under the NPF and RSES has been fully considered.

The NDP also needs to address the community, education and health needs of our diverse communities and an ageing population. ESRI projections indicate that the numbers of people aged over 65 will increase by around 66% to 1.3 million people by 2040, making up approximately 21% of the population. This compares to 15% in 2022 (NPF Section 6.4).

The Southern Region is home to 3 UNESCO Learning Cities, 2 Universities, 3 recently established Technological Universities, and several ETB further education facilities.

The Southern Regional Assembly, together with stakeholders in further and higher education, have championed the principle of the **Learning Region** as key enabler in implementing the objectives of the RSES and Project Ireland 2040. Growing the Region's Human Capital base will support the supply of a skilled workforce, creating conditions necessary to deliver effective regional development. It will also support progress in disadvantages and marginalised communities, helping to ensure they are not left behind.

**Continued investment in our Third Level Institutions will be critical to ensure this ambitions are realised.**



# Climate Transition and our Environment

## Nature Restoration and Green and Blue Infrastructure

**Environmental and climate considerations must form a core part of each investment consideration under the Revised NDP.** As part of this, there is a clear opportunity to embed meaningful environmental and climate considerations in a manner that reflects the core objectives of the overall Project Ireland 2040 process.

The new EU Nature Restoration Regulation, effective from August 2024, mandates Member States to restore at least 20% of land and sea areas by 2030. It will contribute to the long-term, sustained recovery and restoration of degraded ecosystems whilst contributing to the EU's overarching objectives concerning climate mitigation and adaptation,

**The NDP must demonstrate committed support and investment in the implementation of nature restoration** measures and delivered through an all of government, all of society approach. Restoration of the Southern Region's diverse range of ecosystems will involve assisting the distinctive ecosystem to improve its structure and function to a state where the key characteristics of that habitat reflect a high level of ecological integrity, stability and resilience.

**Nature restoration has co-benefits for a smart, sustainable and resilient economy.** This includes economic opportunities that include job creation, tourism, and societal benefits arising from increased quality of life and health benefits.

The SRA has positioned itself as a key actor in delivering informed, practical regional policy and practice for the enhancement of blue-green infrastructure (BGI) and nature based solutions (NbS) considerations across the Region. This includes the development of a bespoke *Blue Green Infrastructure and Nature-based Solutions Framework*, to provide a resource for local authorities, decision makers and developers working in the Region to guide the implementation of BGI and NbS.

**NbS and BGI must be integral to all public capital investment considerations,** as our knowledge and understandings of how nature and biodiversity underpin every facet of a thriving, resilient society is realised. This will ensure that we collectively meet our climate targets through an informed approach to sustainable development and delivering regional attractiveness.





# Climate Transition and our Environment

## Climate Adaptation and the role of the Bioeconomy

As increasingly severe weather events become more common, the need for targeted investment to ensure communities and infrastructure are protected is increasingly important. The Regional Assembly seeks **continued funding for OPW and other agencies for Flood Protection Projects** and other works for the protection of critical infrastructure in the Region.

The use of Nature Based Solutions should be a core consideration in the design of all such projects, and the multifaceted benefits of this approach should be recognised as part of approval for capital expenditure.



The Bioeconomy Action Plan 2023-2025 is the first national action plan for the bioeconomy in Ireland and sets the scene for a new approach to utilising the products, services, wastes, and side-streams from sectors such as the agri-food, forestry, fisheries, and aquaculture more sustainably. It presents an opportunity to harness Ireland's natural resources and competitive advantages in the bioeconomy field with the Southern Region well positioned to deliver a regional focus for the Plan through the many current and emerging enterprises and practices within the Region, as well as through the ongoing policy formation that has been undertaken at regional level.

Owing to this, it is now timely that **investment in industry and enterprise is set in order to move beyond piloting and demonstration, so as to enable commercialisation.** This necessitates support for the direct actors in the bioeconomy and to ensure that this emerging industry is afforded a strong, resilient investment support structure to enable their sustainability and circularity.

# Overarching Structural Recommendations

A fundamental objective of Project Ireland 2040 is overcoming the ‘business as usual’ approach and shifting the trajectory of growth to a 50:50 distribution between the Eastern & Midland Region and the Southern and Northern & Western Regions. The Southern Regional Assembly supports this approach as a positive, credible, reasonable and viable proposition which provides a sustainable basis for all three regions together to harness their potential for the benefit of the State.

As set out in this submission, our key concern is that since the inception of Project Ireland 2040, the NDP has not coherently aligned with NPF policy. The Project Ireland 2040 process will not succeed unless these imbalances are addressed.

The Southern Regional Assembly put forward the following overarching structural recommendations which need to be considered when finalising the Revised NDP 2026 – 2030:

- There needs to be an **urgent rebalancing of the regional distribution of planned investment** to align with the objectives for balanced regional growth set out in the NPF. A clear mechanism should be applied to ensure sectoral investment is weighted in favour of achieving national spatial objectives 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).

- There is a need for **more robust arrangements for monitoring** the alignment of planned infrastructure investment under the NDP with objectives of the NPF.
- Competitive bid processes should not be a primary source for local authority funding the strategic change sought through the NPF.
- 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.
- **Effective delivery mechanisms** should be established to advance the development of regional metropolitan areas in accordance with national policy. Structural mechanisms for the delivery of required mechanisms for implementation should be included as an NPO.

**The overarching recommendation of the Southern Regional Assembly is that the Revised National Development Plan should be strengthened significantly to address the current lack of alignment between the objective for Regional Parity and the structural and funding model required to achieve it.**





**Tionól Réigiúnach  
an Deiscirt**

**Southern Regional  
Assembly**

**Tionól Réigiúnach an Deiscirt**

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