**Ibec**

For Irish Business

# Planning a better future: It's everyone's business

## Submission on the EMRA Draft Regional Spatial and Economic Strategy

January 2019

# Contents

## Introduction: Ibec in the Eastern and Midland Region

Ibec is a national organisation with a strong regional structure. This includes a network of eight regions, with members supported by six Ibec offices across the country. Ibec's regional network ensures that members are serviced regionally in addition to Ibec's national and international services.

A key driver of regional business priorities are the Ibec Regional Executive Committees. Ibec Regional Executive Committees are made up of nominees from Ibec member companies operating within the regions including both multinational and indigenous companies and reflect the diversity of business in terms of business sectors and company size. The committees work to shape, guide and influence business policy priorities for the regions that contribute to sustainable economic growth and employment. Ibec Regional Executive Committees are led by a Regional President. Regional Presidents are also members of the Ibec National Council which provides an important point of contact between the organisation and the respective regions.

Three of Ibec's Regional Executive Committees (Dublin & Mid East, Midlands and North East) match closely to the Eastern and Midland Region. Each Regional Executive Committee has actively participated throughout the development of the National Planning Framework. Our members views and experiences across each region have been developed for this response to the initial public and stakeholder consultation issues paper on the Regional Spatial and Economic Strategy. With this in mind, Ibec has compiled joined up regional analyses from our Regional Executive Committees to match for their respective Regional Assembly areas. Each offers opportunities to be capitalised on and challenges to be addressed.

## Key aspects of the Eastern & Midland Draft RSES:

The Regional Spatial and Economic Strategy (RSES) is a new concept in Irish planning where not only the spatial but also the economic factors that set out the future of the region are brought together into one all-encompassing strategy. Ibec welcomes the opportunity to respond to the draft RSES published by the Eastern and Midland Regional Assembly. We participated in preparation of the document through submitting our views on the issues paper in February 2018. Prior to this, our members were actively engaged throughout the development of the National Planning Framework and the National Development Plan published as Project Ireland 2040.

The draft RSES sets the vision to "create a sustainable and competitive region that supports the health and wellbeing of our people and places, from urban to rural, with access to quality housing, travel and employment opportunities for all".[1] This vision along with the articulation of 16 regional strategic outcomes are to be welcomed. Delivery of this vision must result in effective and sustainable development right across the region.

The ultimate objective of the RSES must be to allow the entire region to develop to its full potential. This includes ensuring the region has the right enabling infrastructure and services to drive sustainable development, meet economic goals and improve the quality of life. Skills, talent, connectivity and quality of life are critical to the region's productivity and a key part of a value proposition to attract and retain businesses and workers to the region. In an increasingly competitive environment in Europe, the region has proven that it can be an engine for growth for the whole country. With the right focus, investment and planning, the region can continue to grow and be successful, providing a vibrant and sustainable environment where future generations can live and work.

An asset-based approach is to underpin the region's growth strategy. Areas across the region have been designated: *Outer Region, Hinterland, Dublin Metropolitan Area and Capital City*. Essentially, these are "characterised by their location and relationship to the Capital City".[2] This undermines effective regional growth by now allowing each area to be examined on its respective merits. The *Midland Region* for example has an opportunity to become the linking point and a central corridor stretching east to west across Ireland and with the *Eastern Region* being the lynchpin of the Dublin-Belfast economic corridor. Any terminology used must be consistent with the region's three Strategic Planning Areas: *Dublin, Eastern and Midland*.

Prioritising Dublin and the wider metropolitan area must not mean the region's other urban areas are devalued. We must not overlook urban centres which fall outside metropolitan areas as national drivers of growth. Some towns and their hinterlands (e.g. Drogheda, Dundalk etc.) are greater in population than when some of our cities were granted city status. Towns across the region will benefit significantly from the effects of agglomeration. This effect allows for a deeper pool of labour, knowledge spillovers, and supply chain integration between centres of economic activity. Population and economic growth can be effectively shared across the region. Ultimately, the output of the RSES must be an adequate supply of commercial and residential property, attractive and quality areas to live, availability of skills, underpinned by sustainable development and the required infrastructure. These will underpin each respective local and regional value proposition.

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### Recommendations:

- Asset-based assessments should be based on the strengths, weaknesses, opportunities and other merits of a particular area.
- The area designations Outer Region, Hinterland, Dublin Metropolitan Area and Capital City should be replaced with the terminology consistent with the Special Planning Areas.
- Better balance growth projections to achieve effective regional development.
- Delivering the objective of compact, urban growth requires a stronger focus on Athlone, Dundalk and Drogheda as regional growth centres and the region's other key towns.

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[1] Draft Regional Spatial & Economic Strategy, Eastern & Midland Regional Assembly (November 2018) p.21
[2] Draft RSES p.37

# 1. Demographic and population projections

Ireland's population will likely exceed 5 million by 2021, 6.2 million by 2041 and 6.5 million by 2046.[3] This suggests that the population could be higher than the National Planning Framework's forecast, which plans for the population increasing to 5.7 million by 2040. This impacts the regional allocations. We are now at the end of a decade that has seen a population increase of over 400,000 people, which was significantly higher than the most optimistic scenario in the last national population projections in 2011.

Today, the Eastern and Midland Region has a population of 2,328,517 and home to one out of every two people in the country. The region has one of the youngest populations in Europe, with 49% aged under 35 years old. The population will continue to expand over the coming years, boosted by the return of net inward migration.

The implications of being too conservative with the national population forecasts should not be underestimated. A recurrence of the current housing shortage, at a local or regional level, is more likely using conservative assumptions. Population projections guide our plans to provide for the associated growth of demand for services such as regional hospitals, third level institutions, cultural and sporting institutions.

## 1.1 Major shift in population and development

The RSES sets out the population projections for the region and county/local authority contained within. It outlines the "headroom" that can be built in to each area in terms of population and housing needs, including how it differs for urban areas over rural areas. The population targets will guide the location of housing and population growth across the region.

There is a major shift in population and development emphasis over the next 15 years from what has transpired in the past 15 years or so. The apportionment of the Ireland's future population at regional, local and metropolitan levels is set out in the *Implementation Roadmap for the National Planning Framework* (July 2018). Government must provide further guidance on how the growth projections are to be incorporated into core development strategies of local authorities.

**Table 1: Population projections for the Eastern and Midland Region**

|  | Pop change 2002-'16 ('000) | Pop Change Projection 2016-'31 ('000) | % difference |
|---|---|---|---|
| **Dublin City** | 59 | 100 | +66% |
| **DLR** | 26 | 39 | +50% |
| **Fingal** | 100 | 53 | -53% |
| **South Dublin** | 40 | 50 | +25% |
| **Kildare** | 59 | 44 | -25% |
| **Louth** | 27 | 22 | -16% |
| **Meath** | 61 | 37 | -40% |
| **Wicklow** | 28 | 24 | -22% |
| **Laois** | 25 | 13 | -51% |
| **Longford** | 10 | 6 | -38% |
| **Offaly** | 14 | 12 | -16% |
| **Westmeath** | 17 | 13 | -19% |
| **EMRA** | 456 | 412 | -12% |
| **Dublin SPA** | 225 | 243 | +8% |
| **Eastern SPA** | 174 | 125 | -29% |
| **Midland SPA** | 67 | 45 | -33% |

**Source:** CSO & NPF Implementation Roadmap

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[3] Better housing: improving affordability and supply, Ibec (June 2018) p.12

The projections in the current draft should be the minimum expected growth over the period because after all we are planning for effective growth, not business as usual. Population and jobs growth could be more heavily weighted towards the regional growth centres (Athlone, Drogheda and Dundalk) and key towns without any absolute reduction in the projected increase for Dublin. These urban centres will act as a driver of population and employment growth across the region, complementing the planned infrastructure investment.

## 1.2 Increasing density across the region

Ireland is a low-density country. This has significant implications for policy making. Dispersed development affects the cost of transport infrastructure and service provision, as well as impacting sustainability and our quality of life. There are environmental, economic and social benefits of denser living that Ireland has not yet fully harnessed in urban, suburban or rural areas.

Density in the Eastern and Midland Region is five times higher than the national average due to metropolitan Dublin and Louth. This has significant implications for policy making. Density leads to more creativity and innovation, shorter commutes, lower emissions and energy costs, and more productivity and prospering businesses. For local authorities, the more spread out people and premises are, the more expensive they are to service and maintain.

**Table 2: Density per km²**

| | |
|---|---|
| National | 29.5 |
| Eastern & Midland | 164.4 |
| Dublin City | 4780.2 |
| DLR | 1729.2 |
| Fingal | 651.1 |
| South Dublin | 1260 |
| Kildare | 132.8 |
| Meath | 84.4 |
| Wicklow | 71.6 |
| Louth | 157.6 |
| Westmeath | 50.9 |
| Laois | 19.2 |
| Offaly | 15.6 |
| Longford | 18 |

**Source:** CSO

Density is not solely a concern for the metropolitan area. Towns of all sizes should incorporate quality of life factors into their long-term planning. Properly planned density and improved quality of life will lead to more sustainable growth. This will help to mitigate rural decline and depopulation that parts of Ireland are currently experiencing. Correctly planned, densifying our smaller towns will allow them to unlock and drive regional growth while preserving and enriching the character of rural Ireland.

## 1.3 Ensuring sustainable land supply

Increasing availability of zoned and serviceable land will be essential to the provision of homes to house the growth projections set out in NPF and by extension, the draft RSES. Current estimates are based on 2014 analysis. Figures are often quoted of land zoned in Ireland for more than 400,000 housing units and over 116,000 units in Dublin.[4] The reality, however, is that not all this land is in easily developed brownfield or greenfield sites, in agricultural use, not serviced by critical infrastructure, water and public transport or unlikely to receive planning permission.

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[4] Better housing, p. 25

Ireland needs a comprehensive approach to strategic land reserve zoning. There is a mismatch in the current practice of zoning land and the development process. This undermines the plan-led approach. The practice of providing a headroom allowance leading to 150% of land being zoned for residential development compared to projected demand has not been sufficient for long-term planning.

All local authorities should undertake strategic land assessments as part of the forthcoming review of local development plans. These should set out the deliverable supply of housing land within a local development plan. It would promote sustainable residential development objectives, bringing an additional layer of coherence to strategic planning. Three separate lists of zoned land should be categorised and prioritised in their local development plans:

- Lands which are located in close proximity to nearby, and accessible to, adequate services to permit housing development within a three-year timeframe.
- Lands which require services and infrastructure installation in order to make development possible within three to seven years.
- Lands which require significant infrastructure and services installation in order to make development possible beyond seven years.

The assessment process will highlight the availability of suitable land, including potential shortages, available for residential development in the short-term. Government initiatives such as the Urban Regeneration and Development Fund and the Land Development Agency should take an active role in advancing the serviceability of zoned land in the second and third categories to increase the land supply in areas with a strong demand for housing.

This approach outlined above would consistent with the stated objective to achieve a "phased and sequential delivery of a steady stream of sites to meet demand including identification of long term strategic future development areas" within the Dublin Metropolitan Area.[5] The phasing periods set out in the draft RSES are 2026 (short term), 2031 (medium term) and 2040 (long term). Given the current demand for housing, it is important that short-term is sub-divided into immediate development and near-term development, allowing recognition that not all developments occur within the lifetime of a development plan.

The Department of Housing, Planning and Local Government should monitor the level of land available for residential development. In tandem, it should also undertake a new residential land availability survey to understand the current strategic land supply, along the lines outlined above. Efforts to promote active land management requires the prioritisation of sustainable land use. Clear guidance is needed on the interaction between new growth commitments set out in the RSES and historic/legacy zonings and developments already underway.

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Recommendations:

- Population projections must be revised to account for a more realistic future scenario in order to achieve the region's economic potential.
- Demographic projections must be regularly reviewed so they don't hold back future growth.
- Government must provide further guidance on how the growth projections are to be incorporated into core development strategies of local authorities.
- Strategic land reserve assessments identifying existing residential zoning, level of serviceability and reality of projected yields should be undertaken by all local authorities.
- Undertake a new residential land availability survey and ensure information is kept up to date. This data should be published on the Rebuilding Ireland portal.
- Government must publish clear guidance on the treatment of historic or legacy zoning within the context of the RSES growth commitments.

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[5] Draft RSES, p.79

## 2. Establishing a growth framework for the Midlands

### 2.1 Athlone as the Regional Growth Centre

Due to its strategic location and scale of population, employment and services, Athlone was designated a regional growth centre in the NPF. Athlone was recognised as key regional centre of growth for the Midlands, whilst extending its influence into Roscommon and Galway. It is an employment centre, an educational centre, an administrative centre, a retail centre, a transport centre and a tourism centre.

The draft RSES does not comply with specific commitments as a *Regional Growth Centre* set out in the NPF. Athlone's regional role has not been clearly "identified and supported" (NPO 2b) and the draft RSES fails to apply a "tailored approach to urban development" with regards to Athlone (NPO 7).  The disparity between what Government aspires to achieve in the National Planning Framework and what is outlined in the draft RSES to support its implementation at a regional level is stark. It demonstrates a lack of ambition for the region and will simply serve to widen existing regional inequalities.

#### Inter-regional challenges must not hold back Athlone

The inter-regional location of Athlone provides specific challenges and is a new risk in terms of spatial planning. The draft RSES fails to recognise the extent to which Athlone fulfils the role of a regional growth centre. This is in sharp contrast to the focus on the Dublin Metropolitan Area and Eastern region. Far more detail is provided in the Northern and Western Regional Assembly (NWRA) RSES regarding Letterkenny/Derry and Sligo as Regional Growth Centres. Athlone's planned future development requires strong coordination between local authorities and between regional assemblies.

Athlone is embedded within the boundaries of two regional assembly areas (EMRA & NWRA) and two local authority administrative areas (Westmeath & Roscommon). The unique case of overlapping boundaries for planning and governance considerations requires special attention. It is the only urban centre in the country where this occurs. The RSES process must recognise the unique challenge that this presents. Athlone's planned future development requires strong coordination between Local Authorities and between regional assemblies.

#### Provide a strategic development framework for Athlone

The RSES must provide a strategic development framework for Athlone, as a Regional Growth Centre. This includes setting out a clear vision for the future growth of this key urban area. Ibec's 2040 regional vision for Athlone is: *"A Midland Regional City with viable scale, incorporating a diverse social and industrial ecosystem with long term sustainable impact for future generations"*. This should inform the RSES and the subsequent RSES.

Athlone's development framework must identify all necessary requirements to deliver on this vision. Key growth enablers must be identified, which can contribute to ambitious compact, sustainable and sequential growth objectives. It identifies large scale strategic residential, employment and regeneration development opportunities and any infrastructure deficits or constraints that need to be addressed. Athlone must be allowed to fulfil its full potential to act as a regional engine of economic growth.

#### Getting the coordinating structure right for Athlone

The draft RSES states that a cross-boundary Joint Urban Area Plan (UAP) is to be developed for Athlone by Westmeath and Roscommon County Councils following the publication of the RSESs. Emphasis will be placed on securing the critical mass and strong urban economy of scale required to contribute to national development and competitiveness. This plan must be based on similar criteria for the development of the Metropolitan Area. It must satisfy Athlone's potential and aspirations to grow into a city region of scale.

There is little detail on the development and implementation of the UAP such as cooperation and coordination between the two local authorities and how the two regional assemblies will monitor implementation. Specific future physical, economic and social development initiatives with clear timelines are required. Based on the draft RSES, competition locations such as Sligo and Letterkenny are well-advanced in their strategies. Athlone, on the other hand, is being held back due to bureaucratic geography, when in fact its location should be recognised as a national and regional strategic asset.

Government must provide specific clarification on the role of the proposed Urban Area Committee for Athlone in terms of developing and implementing the UAP.  If this new mechanism is to be the key body to deliver on Athlone's ambition under the National Planning Framework, it should be clearly articulated in the two RSESs.

Certainty is required over the timelines for establishing the Committee and for undertaking prescribed functions. Furthermore, it is important that there will be strong external business representation on the Committee. This is necessary to ensure that Athlone's spatial and economic objectives can be articulated and delivered on.

## 2.2 Place greater emphasis on the Midlands' four 'key towns'

The draft RSES must also provide sufficient emphasis on the four 'key towns' listed within the Midlands. These are Longford, Mullingar, Portlaoise and Tullamore}. Over one third of 'key towns' listed in the draft RSES are in the centre of the country. 'Key towns' are large towns which are economically active towns that provide employment for their surrounding areas. They must have high-quality transport links and the capacity to act as regional drivers to complement Athlone as the Regional Growth Centre.

These four towns have the capacity and future growth potential to accommodate above average growth, with commensurate employment growth on high quality public transport corridors aligned with requisite investment in services, amenities and sustainable transport. They must be allowed to effectively contribute to compact, urban growth objectives, broadening the local enterprise base (RPO 4.22) and the development of development of strategic employment opportunities (RPO 4.23). The latter seeks to achieve a more sustainable economic base by increasing the ratio of jobs to workers. Developing effective regional policy objectives for the four 'key towns' should occur within the framework of a wider Midlands strategy.

## 2.3. Deliver key enabling infrastructure for the Midlands

Key enabling infrastructure for growing the Midlands must be clearly identified and prioritised. The draft RSES contains too few projects for delivery within the Midlands, with the exception of further improvements to intra-regional connectivity. Delivering on the Midland's growth potential requires advancement of key projects with a strong focus on connectivity, transport, energy, water, waste, education and social infrastructure.

The RSES must exploit the central geographical location of the Midlands as a transport and distribution hub for the country with regional and national benefits. A North-South link strategy, incorporating a central spine corridor through the Midlands is essential to providing a pathway for the efficient movement of goods and people between the country's main economic centres. The North-South corridor is crucial to the region's long-term development. North-South access would also serve as a solution to current traffic congestion problems in particular locations including the M50. The N4 upgrade project is a key short-term priority and delivery must be accelerated to address what is a critical connectivity gap and a significant obstacle to growth. The current estimated timeline is 8-13 years and is unacceptable. Other growth enabling transport projects include expanding the region's rail infrastructure and road projects interconnecting Athlone and the region's 'key towns' (e.g. N62 Birr-Athlone, N55 Longford-Athlone etc).

Other specific key enabling infrastructure projects include expanding the gas network and water supply in the Midlands to secure future investment and sustain current growth. The region ranks better when compared to the other two regions in terms of broadband access but there are significant disparities across the region. The requirement for state intervention is highest in the Midlands with 32% or over 45,000 premises without access. Approximately 37% of premises in Longford are dependent on the NBP, with Offaly (34%) and Laois (33%) second and third highest in terms of NDP dependency.

## 2.4 Supporting a long-term growth strategy for the Midlands

The Midland's central location has the potential to support the future growth and prosperity of the entire country. The region's location is a distinct competitive advantage. The RSES must fully unlock the region's potential to contribute to national economic growth. The Midland region requires its own specialised strategy within the RSES to avoid being marginalised. Well-established industry clusters in the Midlands in software, medical devices, pharmaceutical and ancillary services sectors play a major role in underpinning the region's economic performance. A high quality infrastructure network is paramount in supporting the growth of these global reaching sectors and driving productivity and regional competitiveness.

Population projections for the Midlands must be revisited, whilst achieving sustainable growth. The proposed regional population targets to 2031 envisages the Midlands growing at third-thirds the rate it witnessed during the previous 15 years timeframe. The difference (22,000) equates to the total population of Athlone. Instead, these should be the minimum population growth to achieved, which can be exceeded by strongly performing urban areas across the region. Population projections impact on the provision of new homes and commercial property through zoning decisions. We need to get this right to better inform the core development strategies of the region's local authorities.

The RSES must recognise the Midlands as a key contributor to overall national economic growth. Its central position enables the region to become a hub of regional connectivity, growth, and development, working in all directions and empowering all regions. In short, a mechanism must be established to allow for the involvement of all five Local Authorities in the Midland region in the development of a cross-boundary regional vision for the Midland, to ensure national and regional objectives can be achieved.

### Recommendations:

- Ensure alignment and consistency between Eastern & Midland and the Northern & Western RSESs and avoid two-speed development occurring between the eastern half of the EMRA area and the Midlands.
- The draft RSES must comply with the NPF objectives regarding Athlone's role as the Regional Growth Centre, clearly describing and defining Athlone's as the designated growth centre.
- Provide a strategic development framework for Athlone supported by a clear vision and with growth targets resulting in an adequate supply of commercial and residential property, attractive and quality areas to live, availability of skills, underpinned by sustainable development and the required infrastructure.
- Inclusion of specific details in the RSES on the development and implementation of a cross-boundary Joint Urban Area Plan (UAP) including specific Local Authority development initiatives with timelines.
- Ensure the four designated 'key towns' can effectively contribute to compact, urban growth objectives, broadening the local enterprise base, creating quality local employment opportunities and supporting Athlone as the regional growth centre.
- Accelerate the N4/M4 upgrade (Mullingar to Longford) because the current timelines will undermine the growth ambition for the Midlands and prioritise key road projects interconnecting Athlone and the region's 'key towns' (e.g. N62 Birr-Athlone, N55 Longford-Athlone etc).
- Identify and deliver key enabling infrastructure underpinning future growth in the Midlands such as completing the broadband roll-out, upgrading rail infrastructure, gas network expansion, water and wastewater infrastructure and strategic initiatives such as development of a north-south road artery through the Midlands.
- Support access to a Technological University in the Midlands.
- Ensure adequate funding is ring-fenced for key tourism initiatives in the region e.g. Hidden Heartlands, cycleway projects
- The RSES must provide a coherent and long-term vision for the Midland region, with the active involvement of all five local authorities.
- The region must exploit the central geographical location of the Midlands as a transport and distribution hub for the country with regional and national benefits.

## 3. The Dublin Metropolitan Area Strategic Plan

Metropolitan Dublin must become more competitive, resilient, and inclusive. Talent is mobile. It is not just businesses that invest in an area, people do too. Cities are also not just places where people work. We must recognise that urban planning necessitates building communities, not just housing. All of this impacts a city's ability to attract or retain people. However, this is an area of underperformance in recent years. In 2010, for example, Dublin was ranked as the 26th most liveable city in the world. Today, Dublin is 34th This represents a failure of spatial planning and guidelines to connect the quality of life and place better. This must change.

Dublin must strive to be amongst the most liveable cities in the world. The draft Metropolitan Area Spatial Plan (MASP) sets out a strategy to deliver on the city vision to *"build on our strengths to become a smart, climate resilient and global city region, expanding access to social and economic opportunities and improved housing choice, travel options and quality of life for people who live, work, study in or visit the metropolitan area".*[6] Essentially, the MASP is an overarching framework to manage the sustainable and compact growth of Dublin, urban regeneration and better use of under-used land, integrated transport and land use and the promotion of Dublin as a global city region. This includes identification of key growth enablers, strategic residential, employment and regeneration development opportunities and any infrastructure deficits or constraints that need to be addressed.

### 3.1 Metropolitan growth through collaboration

A lack of cooperation and collaboration between local authorities in many areas has led to unsustainable development patterns and urban sprawl. For example, the population increase between 2006 and 2016 in metropolitan Dublin (13%) was lower than the average growth rate in the Eastern and Midland Region.[7] This MASP approach overcomes a significant barrier that these city regions have faced. They have been organised around administrative, not economic boundaries. Institutionalising collaboration and coordination between local authorities on economic and spatial development is to be welcomed.

Getting the MASP approach right will represent a willingness of Government for a new risk sharing partnership with local and regional authorities. The boundary of Metropolitan Dublin covers all or parts of seven local authority areas. These include all of Dún Laoghaire-Rathdown, Dublin City and South Dublin and parts of Fingal, Wicklow, Kildare and Meath. The rationale for not including all of Fingal should be stated in the published RSES, as the eastern part of the local authority area is a growing population centre along the Dublin-Belfast corridor.

The RSES should contain specific information on how collaboration and coordination in the development and operation of the MASP is to occur. This goes beyond the regional assembly approval process for the MASP as part of the wider RSES. More detail is needed on how the MASP is to be operationalised across all local authorities. A clearing-house must be put in place allowing the local authorities, the regional assembly and all applicable public bodies to deliver on the objectives contained in the MASP. Performance monitoring is to be conducted through a MASP implementation group (see section 7) but clarity is needed on how the delivery of priorities such as enabling infrastructure is to be better coordinated. These areas must be clarified ahead of the alignment of the core strategies of the local authorities within the MASP area. Of course, any reforms to local government structures within the MASP area must be accounted for in the future.

### 3.2 A sensible approach to building heights

A sensible approach to urban building height limits will make a significant contribution to delivering the core objective of compact, urban growth. A focus on height will allow us to address the problems of urban sprawl, housing and commercial space shortages and improved densification. However, the draft RSES only mentions height once in the entire document.

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[6] Draft RSES, p.66

[7] Ibid, p.65

Georgian proportions have defined the Dublin skyline for the last 250 years. Standards established then should not be the sole determinant for the ambition or natural evolution of the city for the next 250 years. This position contributes to urban sprawl; prioritising the character of a few areas over developing the green belt within and outside the city. Dublin is not unique internationally in its dominance of Georgian house proportions or character. Comparative Georgian cities, such as London or Boston, have higher average building heights than Dublin. Closer to home, Limerick has earmarked its Georgian quarter to spearhead its ambitious regeneration initiative for the city.

A common argument against tall buildings is that Dublin is a low-rise city. This understates the low-level of building height generally across the country and more worryingly in our key urban centres. We lack a common a common definition of 'low rise'. What is low rise in Dublin, for example, is far lower than in other cities that local authority planners and opponents of increased height put forward to justify their position. Average building heights in Dublin are lower than other cities across Europe, including comparably sized cities such as Amsterdam, Copenhagen, and Stockholm.
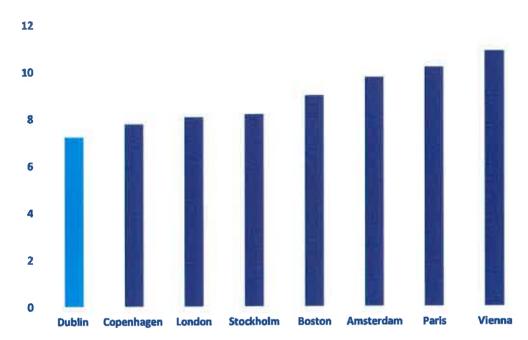
**Figure 1: Average building heights (metres)**



**Source:** Calculations based on Copernicus Urban Atlas (Gleeson, 2018)

The approach taken by local authorities is inconsistent and incoherent. Developments in Cork City and Sandyford are taller than projects initiated in the Dublin City Council area. Blanket restrictions on height in local development plans have resulted in sites within areas in need of redevelopment and regeneration being underutilised, sterilised or inadvertently making a proposed development financially unviable.

The MASP section must be reviewed to take into account the new *Urban Development and Building Heights Guidelines for Planning Authorities* (December 2018), which were published during the draft RSES consultation period. More detail is required on how planning authorities will integrate increased height into their forward planning process. This ranges from default minimum height standards such as six storeys within central urban areas but also the MASP must include a clear statement on taller buildings in relation to sustainable development, within appropriate locations within the metropolitan area. In developing policy on building height, attention should be paid to international best practice in urban design and regeneration and acknowledge that clusters of well-designed taller buildings can provide housing and make a beneficial contribution to their surrounding streetscape and skyline. The focus should be on actively promoting good design within the context of place-making.

## 3.3 Density is central to compact, urban growth

Transport infrastructure, the cost of living, sustainability, and the built environment are all affected by how well space is utilised and they play a role in determining the quality of life. Globally, the past 50 years has been a period favouring suburbanisation and urban sprawl. More recently the trend has been reversed. There is a return to focusing on the city core as the focal point for growth.

Irish cities not only lag behind international competitors concerning building height, but they also have lower population densities. Paris has double the population density per square kilometre than Dublin, and it's five times greater in London. Why is density important? Cities concentrate productivity, innovation and creativity and higher density cities are more successful across these areas. Therefore, increased density is crucial to a metropolitan region's economic future. It can enrich character, place and identity, which boosts attractiveness and overall competitiveness.
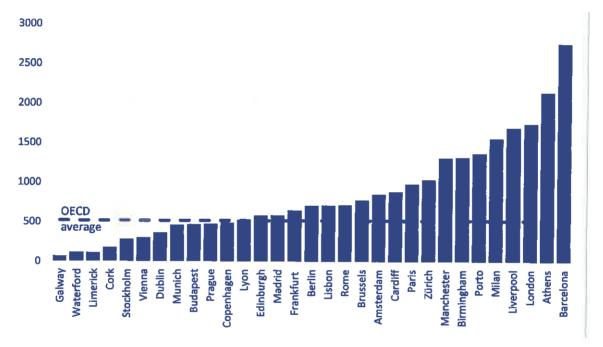
**Figure 2: Population density in Irish and other European cities, people per km²**



Source: OECD

Metropolitan Dublin will require a significant increase in density. A new pragmatic approach must be taken by its constituent local authorities, supported by all appropriate national guidance to ensure well-designed higher density development can be delivered in specific locations. Higher density development can encourage more affordable housing by spreading construction costs across more housing units within a development, which also increases the viability of site development and works.

The MASP should champion well designed and higher density developments within the metropolitan areas without loss of high-amenity green spaces. The MASP's active land management strategy ranging from metropolitan through to local implementation must fully support the objectives of compact, smart growth through urban infill.

The MASP will allow us to further streamline and harmonise spatial planning across the wider city region. It is envisaged that they will guide development plan formation at a local authority level once adopted. They should force local authorities to fully adopt the compact city policy aim, by requiring local authorities to align their height, density, indicative plot ratios and coverage policies with the emerging transport strategies. Some local authorities lack policies in relation to these areas in their entirety, while others have a clearly defined and well-developed strategy.

## 3.4 Integrated land use and transport

The RSES' vision for Dublin is that it becomes a smart, climate resilient and global city region expanding access to social and economic opportunities and improved housing choice, travel options and quality of life for people who live, work, study in or visit the metropolitan area. Achieving this means that land use and transport policies that allow people to choose to where they want to live and work, rather than having these decisions dictated by circumstance. Connectivity and effective land use planning will ensure Dublin is a living city. Jobs, homes, culture, and socialising should be integrated into the fabric of all parts of the city.

Residential and commercial developments should not occur without the supporting infrastructure to keep them connected to the rest of the city region. It is essential that land use and transport are developed and planned for through a coordinated approach to avoid the mistakes of the past that handcuffed the growth of Dublin's commuter belt to the rise in car dependency. If successfully implemented, compact growth and the delivery of homes within the urban core will encourage a greater share of the population growth to occur in cities.

However, the population on the commuter belt will continue to grow, albeit more slowly. The transport network into and around the city region will need to be more connected, integrated, and efficient. Business, as usual, is unsustainable. The Dublin city-region is still car dependent for most of its journeys. Roughly 65% of commutes in the Dublin and Eastern Special Planning Areas are made by car. More sustainable modes of transport such as walking, cycling, and public transport must be prioritised for the share of commuter trips by car to be reduced – a stated objective of the National Transport Authority's *Transport Strategy for the Greater Dublin Area 2016 – 2035*.[8] Not only would this reduce emissions, but it would lead to more economic activity and an improved quality of life for residents and workers through shorter commutes, better air quality, and more leisure time.
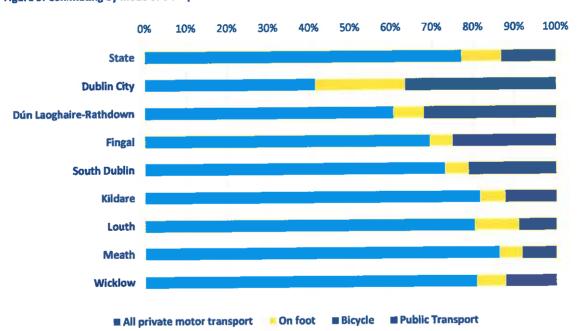
### Figure 3: Commuting by mode of transport



Source: CSO, Census 2016

The BusConnects initiatives is a good example of progressive measures aimed at improving the public transport system. The bus network will continue to be the key to the city region's mass transit, and the changes promised in BusConnects are welcome. Capital investment in other transport projects such as the DART Expansion Programme and the MetroLink is also to be welcomed. As the number of pedestrian and

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[8] National Transport Authority (2016), *Transport Strategy for the Greater Dublin Area 2016 – 2035*, pg 6. Available at: https://www.nationaltransport.ie/wp-content/uploads/2016/08/Transport_Strategy_for_the_Greater_Dublin_Area_2016-2035.pdf

cyclists in the city continues to rise, so should investment in footpaths and dedicated cycling infrastructure that will facilitate the move towards more sustainable modes.

Transport investment is essential to reduce the region's reliance on private motor vehicles. Over time, there should be a conscious effort by authorities to continue reallocation of road space to more sustainable modes. The experience of Vancouver demonstrates that a growing city does not require more cars. Vancouver's innovative 1997 Transportation Plan recognised that the city's future did not lay in road expansion, and instead prioritised other modes of transport, primarily walking and cycling. While the number of journeys into downtown Vancouver increased, as did the population and the number of jobs, the number of car journeys declined by a fifth.

Recommendations:

- Delivery of the initiatives under the MASP must result in an improvement in Dublin's position in global quality of life rankings.
- The MASP should detail how the seven local authorities will collaborate and coordinate on the delivery of the objectives, how the MASP process will interact with the wider RSES and the role of the regional assembly regarding oversight and implementation.
- Establish a clearing-house to allow the local authorities, the regional assembly and all applicable public bodies to deliver on specific the objectives contained in the MASP.
- The MASP must include a clear statement on increasing building heights, including taller buildings within appropriate locations within the metropolitan area.
- Champion higher density development across metropolitan Dublin to achieve the objective of compact, smart growth through urban infill.
- Ensure all constituent local authorities fully adopt the compact city policy aim through alignment of their height and density policies with integrated land use and transport strategies.
- Transport investment with the metropolitan area should be integrated with land use and development objectives established in the RSES.
- Ensure sustainable development targets over the lifetime of MASP are not derailed by delays to key supporting infrastructure such as Metrolink, DART expansion and the Water Supply Project.

# 4. Enterprise and employment

The RSES must support enterprise growth across the region. Placemaking, addressing strengths and weaknesses of each region, and smart specialisation is core components of Ireland 2025, the national enterprise strategy.

In 2017, the Minister for Jobs, Enterprise and Innovation announced a €250 million fund to drive enterprise development across the country, including investments in advance property solutions and competitive initiatives to stimulate collaboration in the areas of entrepreneurship, innovation, enterprise infrastructure and job creation.

The focus must be on re-intensification of existing business locations. This strategy aims to create the right conditions for enterprise to thrive, to create wealth and improve quality of life for all. Key aspects are orderly growth, placemaking, smart specialisation and clustering. Consideration is given to future proofing risk management so that growth is sustainable, competitive, inclusive and resilient. Skills, talent and innovation are identified as drivers for resilient and sustainable growth.

Place-making can inform region-specific approaches. However, there are likely to be several similar 'horizontal' challenges (that have a regional perspective), and it is important that a coordinated approach is taken in addressing them- including for example skills and innovation. With the intensified focus on regional development, it is important that we do not inadvertently create 'consultation' fatigue, and/or duplicate efforts, and/or see an increase in extensive 'activity' that is neither sustained or delivering outcomes.

## 4.1 Enterprise in the region

Regions throughout Ireland are different in terms of potential, critical mass, stage of development, nature of sectors, skills profile, innovative capacity, natural resources, cultural and/or heritage assets etc. Such potential needs to consider a whole of enterprise approach – including sectors and activities that may not 'sit' within agency profiles. Moreover, without our enterprise base, Irish society would not and could not enjoy the significant economic regeneration and growth this country is currently experiencing.

There is a strong interdependence between the planning, development and creation of an attractive environment and enterprise development. Companies are attracted to invest in locations where they access skills, where people will want to live and work and where the surrounding infrastructure are supportive of business (including, for example, transport and broadband networks; education and training facilities etc.). Establishing a strong sense of place contributes to the attractiveness factors for entrepreneurship, for business investment, for foreign direct investment (FDI), talent and tourism.

## 4.2 Employment in the region

Towns must be developed in terms of their economic self-sufficiency to minimise the need for commuting and support the development of surrounding areas. This would support locally generated employment and create prospects for growth. Employment creation will come from a broad base of possible activities; it is critical that potential is recognised and supported across a range of possible sources both indigenous and from overseas. We must help firms attract and retain scarce talent; a greater focus on supporting indigenous enterprises; and commitments to underscore Ireland as a beacon of certainty for mobile investment in an increasingly uncertain global economy.  Employment along with social protection and pensions system needs to support easy career transitions.

Examining employment on a sectoral basis is vital in understanding the dynamism of the economy and where skills and investment may be leveraged at a regional level. This insight is also helpful when designing enterprise and skills development policies. The 12-year RSES must support the requirements of traditional and emerging business sectors (e.g. financial services, fintech, biopharma, medical technology, business services, engineering, internet of things, infrastructure etc.) over its lifetime. Improved business conditions will support job creation and boost local employment opportunities.

## 4.3 Education in the region

The RSES must recognise the importance of education and lifelong learning to sustaining economic success and building strong communities. It must improve education and develop the right skills to attract employers and retain talent and promote social inclusion to ensure opportunities for quality jobs across the region. Together with the NPF, the RSES must define how human capital development will fit into the overarching framework that will inform the strategic investments needed to realise the potential for regional growth. The Eastern and Midland Region is currently home to four universities (DCU, NUIM, TCD and UCD), one technological university (TU Dublin), three institutes of technology (IADT, AIT and DKIT), six Education and Training Boards. There are significant challenges for businesses to engage effectively with 14 diverse public education institutions and agencies, plus a range of private providers. The creation of three *Regional Skills Fora* are an important step in providing structures for engagement between enterprise and providers on the skills agenda. However, this project is still at an early stage, and more work is required to deliver progression pathways between higher and further education.

Within the higher education institutions in the region, research and development are an important and growing activity. The RSES must give a higher priority to regional R&D and enterprise policy more generally. The RSES can encourage high-level interactions between research organisations, public bodies, business and education institutions to cluster and network to become more engaged in the social, economic development of their region. Innovation is essential to boosting regional productivity.

Education should not be considered solely as a demographic or quality of life issue. The creation of high skilled jobs can have a strong 'local multiplier' effect on job creation while the 'drag' on regional economic growth of large numbers of low skilled workers can be significant. There are striking regional disparities in skills attainment within Ireland which should be addressed through an integrated regional planning and enterprise development framework. The Expert Group on the Future of Higher Education Funding identified a capital investment requirement of €5.5 billion over the next 15 years to cater for increased student numbers, capital upgrades, health and safety issues, equipment renewal and ongoing maintenance. A coherent planning framework for medium-term is required to ensure the most effective use of additional resources.

## 4.4 Retail in the region

Efforts to rejuvenate town centres must go beyond those contained within the draft RSES. Increasing footfall is one priority. Higher density within our towns will also make a beneficial contribution. Achieving a greater mix in uses within urban areas will lead to sustainable rejuvenation occurring. It requires achieving a better and more appropriate balance between residential, retail and other commercial or business activity. This objective will require a collaborative approach between local business, the local authority and Government to be successful. The future development of town centres should be consistent with A framework for town centre renewal, development by the Government's Retail Consultation Forum.

A renewed focus on the retail mix across the region is welcome. However, the focus on in-town versus out-of-town retail is unhelpful. Some retailers operate in out-of-town stores. Some operate in towns and city centres. Many operate in both. The RSES must recognise that out-of-town shopping, which brings multiple benefits to retailer and consumer alike. Efforts to rejuvenate town centres does not require a loss of focus on the shopping centre or out-of-town retail experience.

Over the years, peoples' shopping habits have changed. Retailers across the city are facing challenges of online shopping, new shopping destinations in neighbouring local authority areas and people who want to shop later in the day and after work. Town centres will require a greater mix of specialist shops, which contribute to the character and attractiveness of the town centre as a destination for shopping. Increased availability of cafés, bars and different categories restaurants will not only relieve the pressure on the retail sector but support it also.

**Recommendations:**

- The plan should be revised in light of the Brexit outcome.
- We welcome the strategy of smart specialisation, clustering, place-making, future proof and orderly growth.
- We support the regional policy objectives of a shared evidence base, economic risk management system and anticipating economic structural changes.
- We must improve opportunities for business to collaborate with local stakeholders, including enterprise agencies, to encourage enterprise development.
- We recommend linking enterprise to higher education to develop skills and increase innovation.
- We applaud opportunities to build the region's innovation capacity and activity.
- Development of a performance monitoring/evidence-based system for the regional economy.

## 5. Better Lives, Better Business – the quality of life agenda

The RSES must articulate a clear statement that the region must offer a good place to both live and work. Future economic growth and demographic change must be planned nationally, regionally and locally. Housing and infrastructure are singled out as key areas that need to be addressed in order to allow Dublin to continue to grow. Quality of life is key. The RSES captures the substance of the Better Lives, Better Business campaign and previous submissions made to the consultation on the issues paper.

### 5.1 Better housing: improving affordability and supply

Housing is a critical part of a country's physical infrastructure. Continued shortages of affordable housing in Ireland threatens to undermine the achievement of many of our economic policy goals – including the attraction of overseas investment into Ireland, the promotion of third-level education, the reduction of emissions and the improvement of household incomes and wellbeing. In addition, the lack of housing is a key driver of an acute social crisis. There is a clear link between housing availability, affordability and our economic competitiveness. The cost of accommodation is a key factor in the decision if and where workers locate in Ireland.

The rise in house prices and rents experienced across all parts of Ireland has been a consequence of a significant imbalance between supply and demand following the crash. This has also resulted in a lack of affordable housing in urban areas where the need is greatest. The story of the decline in house building in recent years is well-known, but the impact of this shortage of new building activity is now clearly a crisis that is making its impact felt, as the economy grows strongly, and our population continues to rise. Companies are often choosing to locate where talented workers want to live rather than the other way around. As such quality of life, household mobility and value for money in housing is a growing determinant of our ability to compete internationally.

#### New household formation

Ireland will see a steady increase in the number of new households being formed, reflecting the growth in population coupled with a decline in average household size. Based on these forecasts, we estimate that nationally new household formation will average over 36,000 per annum between 2018 and 2046. Each of these households will need a home. This will involve a combination of owner-occupied and renting households.

The draft RSES does not contain targets for housing construction, with one exception. The Dublin MASP includes the specific target of 7,500 new homes to be built annually.[9] This is less than Ibec projections, which indicate a need for 10,800 new units every year to 2046. However, if we include pent up demand, the figure could be closer to 15,000 units per annum over the next five years. Like with the population projections, this figure is far too conservative and could place an undue restriction

#### The right housing mix

The draft RSES recognises that the current housing market is undermining the region's quality of life proposition. The RSES promotes compact, urban growth through urban infill and brownfield development. It identifies measures to unlock the barriers to supply in the Metropolitan Area and in other urban areas. Future housing development is to be based on sustainable travel patterns, employment and educational locations.

There is currently a mismatch between what housing is suitable and what is available. This affects affordability of housing and ultimately the region's ability to attract or retain people. The demand for homes is also driven by changes in the average household size. Generally, there has been a steady decline in average household size in Ireland. Census 2016 results show, however, that this stabilised in 2016, with the average number of persons per household in the region at 2.80 compared to 2.74 in 2011. This contributed to the first national growth in average household (2.75 in 2016 compared to 2.73 in 2011) size since the foundation of the State.
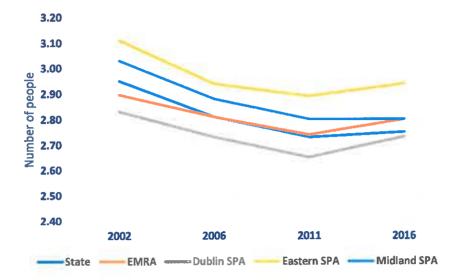
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[9] Draft RSES, p.79

**Figure: Average persons per household, 2012-2016**



Source: CSO

It likely represents, for the most part changes imposed on individuals' living arrangements due to the housing crisis rather than any change in peoples' preferences. The reported increase was largest in Dublin and the surrounding counties, in particular the metropolitan commuter belt. Ibec analysis estimates that household size nationally will decline to an average of 2.3 persons per household (EU average) by 2046.

The draft RSES acknowledges that a change in household mix and tenure will be required. We need the right mix of housing in the right areas, in accordance with suitable and sustainable development practices. It is important that the region's housing policy adequately accounts for the expected demographic changes that will impact the housing stock and mix required over the coming years. A holistic view of housing is required, allowing for an appropriate mix of location, type, tenure and accommodation. Students, young professionals, families, and an older population all have different housing needs.

## 5.2 Sustainability

A cleaner and more resilient environment brings both societal and economic benefits. We must climate-proof the RSES to allow the delivery of a low carbon, climate resilient, and environmentally sustainable economy. Ireland requires a reliable and secure water supply and service. Improved water quality brings environmental, social and economic benefits. The region's approach to waste management must contribute to the deliver of the commitments in the RSES and NPF.

### *Supporting the decarbonisation agenda*

The theme of Irish energy policy over the next twenty years will be one of transition as the country follows through on its international commitments and targets the delivery of a low carbon, climate resilient, and environmentally sustainable economy. This includes an 80%-90% reduction in greenhouse gas emissions compared to 1990 levels by 2050. Meeting these objectives in the context of a growing economy and an increasing population while also addressing concerns around energy security and affordability will be one of the greatest challenges of our time. Appropriate focus on our decarbonisation agenda must be adequately incorporated into the RSES.

The RSES will need to facilitate the incorporation of long-term emissions considerations in planning and infrastructure decisions right across the region. Many infrastructure and development decisions are effective over several decades and hence decisions in the 2020s could affect Ireland's emissions profile in 2050.More effective land and marine planning and development will be needed to increase the region's resilience to climate change, reduce emissions and support the delivery of vital energy infrastructure.

Significant investment in our electricity system will be required over the next 20 years if we are to meet projected demand levels, remove bottlenecks, build greater efficiency into the network and allow for additional renewable energy capacity. Electricity will play a major role in decarbonising our heat and transport

networks and improving air quality. EirGrid's *Tomorrow's Energy Scenario*'s project includes an assessment of regional generating capacity and demand requirements. The RSES and Climate Action Regional Offices, as well as with individual Local Authorities should engage with EirGrid on this initiative.

Meanwhile, natural gas - given its relatively low greenhouse gas profile and negligible levels of particulate matter - will play an important role in in the transition. Biomethane grid injection meanwhile can help reduce the non-renewable carbon content of the fuel. This will involve a network of anaerobic digestion plants using feedstock from their surrounding area to produce renewable bio gas for injection into the national grid at a dedicated regional grid injection facility. This will also create significant regional employment opportunities. The RSES should consider the practical planning and zoning requirements needed to roll out such an integrated network.

Climate-smart compact growth will play a crucial role in reducing emissions. This is particularly relevant for the transport sector where longer commutes have led to an overreliance on petrol and diesel cars. Compact growth allied with greater investment in public transport and cycling networks will help drive real emissions growth across the region. All future development – where appropriate – must be centred in areas with access to sustainable transport options. Ibec also supports the regional objective of rolling out charging and re-fuelling infrastructure for alternative fuels and promoting the increased use of rail for passengers and freight. Time-limited incentives should also be introduced to help encourage early adopters of alternative fuel vehicles.

The region also has potential to roll out efficient community heating networks in densely populated areas. These networks are commonplace in Nordic cities and towns and can serve the needs of households, apartment complexes, hotels and commercial units. These heat networks could make efficient use of waste heat from thermal power stations and industry. The RSES should develop detailed heat maps of densely populated areas to identify viable locations for district heating schemes and/or efficient use of waste heat.

Ibec strongly supports the objective of promoting energy conservation in the built sector (RPO 7.39). It will be important to ensure that new buildings are compliant with the Nearly Zero Energy Building (NZEB) standard. However, we would caution against an overly simplistic approach to the promotion of specific construction materials claiming low to zero upfront embedded energy and $CO_2$. It is necessary to consider the lifecycle of such materials, including any co-products or land use impacts.

Thousands of houses and buildings in the region will also need to undergo extensive energy efficiency retrofits in the coming years. The RSES in cooperation with the regional skills fora needs to consider the upskilling requirements and expertise needed to facilitate this large undertaking.

Ibec is developing a detailed Low Carbon Transition Roadmap setting out a cost-effective pathway for ireland to follow over the period to 2050. We look forward to discussing our findings and policy recommendations with all three Climate Action Regional Offices, as well as with individual local authorities.

### Water

The draft RSES highlights the precarious water supply/demand balance now prevailing in the Greater Dublin Area. Notwithstanding efforts to conserve mains water, and to make use of rainwater, will indeed be necessary to secure an additional source in the medium term. The Eastern and Midland Region Water Supply Project as currently proposed represents the best available option identified by extensive analysis and stakeholder consultation. It will ensure sustainable growth of the Region's population for decades to come. We very much hope that it does not get unduly delayed by planning objections or legal challenges. This concern equally applies to certain critically important energy projects within the Region, most notably the North South Electricity Interconnector. Any further delays to the project will impact adversely on energy cost competitiveness and greenhouse gas intensity not just for the Regions but also for the entire island of Ireland.

### Waste Management

With regard to waste management and this valuable resource, Ibec encourages its member firms to adopt circular economy thinking. Ibec educate Irish businesses on the need to consider the principles of the waste hierarchy to prevent waste where possible. Circular design thinking encourages the designing out of waste through innovation and this should be promoted in the region. Life cycle analysis and localising your supply chain are essential components in future proofing waste management.

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Nevertheless, there will continue to be a particular challenge in disposing of soft plastics. It does not currently appear commercially feasible to recycle them anywhere in Europe.

Nevertheless, there will continue to be a particular challenge in disposing of soft plastics. A certain proportion can be used as waste to energy. Designing out complex multi-layer composites will help to increase recyclability. State intervention and joined up thinking between regions and government departments will be essential to manage soft plastics in Ireland.

Due to increased construction, soil waste management should be a primary focus area. The NPF, RSES and local authorities should take into account the expected increase in demand for management of soil removed from sites. Much of this soil may require extensive treatment before being classified as 'no longer waste' and appropriate facilities should be provided to address this along with easing the current administrative burden.

### The blue economy

The draft RSES correctly identifies the need to integrate land and marine spatial planning (RPO 7.1 & 7.2). To this end, the EMRA and its constituent Local Authorities will need to engage actively with a range of sectorial and environmental groups, for example through the Marine Spatial Planning Stakeholder Advisory Forum. We consider the recently-published National Marine Planning Framework Baseline Report to be a useful reference for understanding how to ensure ambitious but environmentally sustainable harnessing of our coastal and offshore resources. The Marine Plan, when finalised, will augment and replace Government's *Harnessing Our Ocean Wealth* strategy. We would also encourage the Regional Authority to support Ibec's call for faster progress on updating Ireland's antiquated foreshore legislation. At present, there is significant duplication of the licensing and consent procedure for new coastal infrastructure.

## 5.3 Better infrastructure

The draft RSES identifies enabling infrastructure, which will underpin regional growth. There is a strong focus on connectivity, transport, energy, water, waste and social infrastructure. It is important that the right infrastructure can be delivered on time and within budget. For example, delays to public transport infrastructural improvements in Dublin could undermine growth targets for the wider metropolitan area, the region and the country.

Investment in public infrastructure is fundamental to creating the economic conditions necessary for long-term national prosperity. Underinvestment over recent years has run down the region's stock of critical infrastructure. The lack of investment in the economy has been a major constraint to progress. It is important that the National Development Plan (NDP) and the National Planning Framework are aligned under Project Ireland 2040.

### An effective regional investment framework

The NDP has earmarked a €116 billion investment on priority projects over the period to 2027 and will see annual capital spending exceed 4% of economic output. If delivered, the NDP will go a long way to remedying the chronic and pronounced infrastructural deficits that need to be addressed. In terms of the Eastern and Midlands Region, 69 projects are currently included in the Project Ireland 2040 Capital Projects/Programmes Tracker, with 24 "major projects for every million of the target population".[10] It is also "important to note that many of the projects located in the Eastern and Midland Region are national in nature".[11]

Significant projects for the region in the NDP include:

- Water Supply Project - Eastern and Midland Region;
- M7 Naas to Newbridge Bypass Widening;
- Metro Link;
- Dublin Busconnects;
- The National Children's Hospital.

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[10] Project Ireland 2040 Investment Projects and Programmes Tracker, IGEES/ Department of Public Expenditure & Reform (September 2018) p.11
[11] Ibid, p.11

Projects listed above will underpin medium-term growth. In addition, the region will secure additional projects through the various national investment programmes such as in education and social infrastructure. Ibec believes that more needs to be done and that the NDP does not address all the key infrastructural deficits in transport and public infrastructure. If a business case can be made, projects such as the Dart Underground should be added to the public investment programme earlier than is currently envisaged.

## Transport

The RSES is an opportunity to provide a regional vision for the transport network, with a particular focus on interurban connectivity. During the period up to 2008, there was considerable investment in road transport connections between the capital and most of the regions. However, the motorway network was never completed and the urban centres across the region remain poorly connected to each other. This makes it more difficult for them collectively to provide an effective counterweight to Dublin. Projects like N4 Dublin to Sligo and the N11 upgrade will significantly advance growth across the entire region.

Successfully addressing interurban connectivity requires a focus on other modes of transport other than roads. Ibec supports plans for future investment in high capacity rail connecting Belfast. The RSES must connect with the overall vision for the rail network in the region, including the potential enhancement of freight capacity. This is in addition to plans for rail investment within Dublin, which have already been determined by the Transport Strategy for the Greater Dublin Area.

## International connectivity

As a trade-intensive island at the edge of Europe, Ireland is heavily reliant on international connectivity provided by our aviation and marine transport infrastructure. They play an essential role in our economic prosperity, especially trade and tourism. Accessibility to ports and airports for high quality international connectivity is of critical importance.

Our ports and airports are assets of strategic national infrastructure, underpinning regional development. It is important that we improve accessibility, such as continuing to invest in road and rail linkages. We must also fully leverage Ireland's port and airport infrastructure. International connectivity is recognised as a national strategic outcome in the National Planning Framework (NSO 6). Key will be completion of the second runway at Dublin Airport (RPO 8.15). The planning conditions attached to the runway, limiting aircraft movements at key times must be revisited. Any constraints on Ireland's airports have the potential to become constraints on economic growth. Midland counties are well-placed to leverage their proximity to strategic infrastructure assets in the other regions in addition to those in the region itself (e.g. Shannon Airport, Port of Waterford etc.). This strategic advantage should be better reflected in the RSES (RSO 15).

## Broadband

The expanding digital economy plays an increasingly crucial role in the exchange of goods and services. Insufficient broadband connectivity leaves local businesses and householders at a significant disadvantage. The opportunities the digitalisation offers cut across sectors and play to the strengths of both urban and rural areas. Currently, 89% of the region's households and businesses have access to high speed broadband (30Mbps or greater) from commercial operators.[12] The National Broadband Plan (NBP) will address the remaining 11% of premises across the region.

Data intensive industries are increasingly mobile and have provided vital boosts in job creation around the country. Attracting these industries remains a challenge in some local authority areas. Local businesses selling niche products or services are prevented from accessing global marketplaces due to insufficient broadband access quality. This is not to mention that the trend of remote working is increasing. Lack of access to high speed broadband undermines competitiveness. This is most acutely felt in rural areas.

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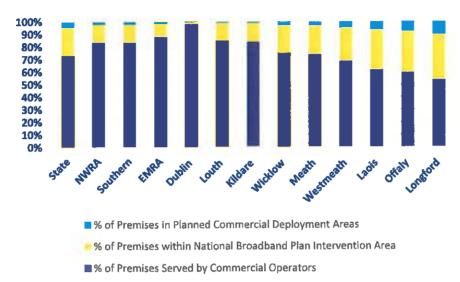[12] National Broadband Plan County Statistics, November 2018

**Figure 4: Broadband coverage by region and county**



■ % of Premises in Planned Commercial Deployment Areas

● % of Premises within National Broadband Plan Intervention Area

■ % of Premises Served by Commercial Operators

**Source:** Department of Communications, Climate Action and Environment

## 5.4 Better planning: reforms for sustainable development

Ireland's planning consent and appeals system must be able to deliver the right investment in the right place and at the right time. In practice, however, it is not working as intended and needs to be reformed. The NPF, which has sustainable development at its core, represents an important opportunity to achieve greater policy coherence, effective regional development and ensure commitments can be delivered. The RSES replaces the current regional planning guidelines and is in the middle of the newly established planning hierarchy under the NPF. It is important that the planning system does not undermine the objectives set out in the RSES.

Efforts to house our growing population and problems of inadequate infrastructure are being hindered by a planning regime that is unnecessarily costly, slow and cumbersome. An overhaul is urgently needed to help underpin Ireland's economic prosperity. A streamlined planning system will not on its own accelerate the construction of new homes sufficiently to meet pent-up demand. Nor will it automatically ensure the timely delivery of essential public amenities such as new or upgraded roads, water supplies, sewage treatment plants and electricity networks. An increasing proportion of planning decisions are being challenged in the High

The scale of the challenges to be overcome are not to be underestimated. However, action is needed so that the planning system does not threaten economic development, nor undermine the success of the NPF and the NDP or damages Ireland's international reputation as a place to do business. Ibec has identified key actions that must be taken by Government across the following five key action areas:

- Political leadership – the planning functions of local authorities across the country must operate a consistent level of service.
- Regulation and oversight – full operational capacity to be given to the Office of Planning Regulator as quickly as possible.
- Planning processes – streamlining of procedure by which An Bord Pleanála deals with Strategic Infrastructure Development applications.
- Legislative reform – revisions to legislation governing Compulsory Purchase Orders.
- Legal challenges – Reduce timelines for any legal challenges.[13]

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[13] Better planning: reforms for sustainable development, Ibec (January 2019) pp 4-5

**Recommendations:**

- Avoid restrictive measures on the supply of new homes, including deleting the conservative housing demand target contained in the Dublin MASP.
- Ensure that the Region delivers the right housing and tenure mix (e.g. apartment focus, rental sector, ageing population, students, social housing, affordable housing etc).
- Urge progress on MAFA Bill
- The EMRA must actively engagement with the Marine Spatial Planning Stakeholder Advisory Forum.
- Ensure Ireland's long-term emission reduction obligations are considered when making planning decisions for new developments and strategic infrastructure
- Engage with EirGrid's Tomorrow's Energy Scenario's to assesses the region's future electricity demand requirements.
- Consider the practical planning and zoning requirements needed to roll out an integrated biogas network in the region.
- Introduce time-limited incentives to help encourage early adopters of alternative fuel vehicles.
- Ensure all future development – where appropriate – is centred in areas with access to sustainable transport options.
- Develop detailed heat maps of densely populated areas to identify viable locations for district heating schemes and/or efficient use of waste heat
- Cooperation with the regional skills fora to consider the upskilling requirements and expertise needed to facilitate a regional energy efficiency retrofit scheme Circular design thinking, life cycle analysis and localising your supply chain are essential components in future proofing waste management.
- Undertake a demand review of the available capacity for soil waste treatment to meet RSES commitments.
- Ensure the regional investment framework set out under the NDP is delivered.
- Establish a business case for advancing new infrastructure projects not currently included in the NDP project tracker to underpin ambitious growth.
- Provide a regional vision for a multimodal transport network, focusing on inter-urban and intra-urban requirements.
- Ensure the planning system supports the delivery of the Project Ireland 2040 objectives set down in the NPF, NDP and the RSES.
- Address challenges in the planning system through a series of actions focusing on political leadership, stronger regulation, streamlined planning processes, reform of planning legislation and ensuring that legal challenges get resolved more speedily.

## 6. All Island Cohesion

Local and regional economies function across both jurisdictions, creating an all island market across many sectors. Our ambition is for a fully connected all-island market that supports greater prosperity and employment through increased flows of people, goods, services, energy and investment. Cross border economic activity plays a large role in driving growth in both Ireland and Northern Ireland. Cities and local economies in Northern Ireland have a strong influence on the economies on this side of the border. Towns within the region derive economic benefits by their proximity to urban centres in Northern Ireland.

Cross-border co-operation and gains are derived in a multitude of areas ranging from environmental collaboration, accident and emergency services, education, energy, tourism, recreation, social cohesion and transport. There are substantial economic benefits, including shared public service provision, to be gained from the effects of agglomeration between urban centres. It allows for a deeper pool of labour, knowledge spill-overs, and supply chain integration between centres of economic activity.

The all-island economy has developed into an efficiently functioning 'natural economic zone' of scale, which delivers significant economic benefits:

- An all-island consumer market of 6.6 million people, which will grow by 33% to 8.8 million by 2048.
- Employment totalling 2.869 million, up 32% since the Belfast / Good Friday Agreement in 1998. The single all-island labour pool is greater than that of Denmark, Norway or Scotland.
- €3.2 billion (stg£2.84 billion) trade in goods only between Ireland and Northern Ireland
- Gross consumer spending of €72.2 billion (stg£60.5 billion)
- 110 million people border crossings annually
- 3,600 light goods vehicles crossing the border every day.[14]

A functional cross-border economy requires collaboration between authorities on both sides. It is important that sufficient consideration given by the RSES to cross-border economic and social links between the two jurisdictions on the island (RPO 11.1). It is important that the RSES prioritises joint spatial planning and development along the Dublin-Belfast corridor. It is right that recognition is given to the Drogheda-Dundalk-Newry economic zone and the crucial role it plays as a North-South economic interconnector.

Brexit creates uncertainty; this should not undermine territorial cohesion. The future development of the all-island economy must be protected. This includes ensuring the attraction, retention and development of skills necessary to deliver future growth. Significant investment in essential infrastructure across both jurisdictions will be required to sustain economic gains because "failure to do so will result in increasingly chronic infrastructure deficits that negatively impact on competitiveness and the quality of people's lives".[15]

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**Recommendations:**

- The RSES must support the development of the all-island economy, including the Dublin-Belfast corridor, post-Brexit.
- Infrastructure requirements required to underpin further growth must be advanced.

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[14] Ireland & Northern Ireland: Business on a connected island, IBEC-CBI Joint Business Council (July, 2018) p.4
[15] Ibid, p.35

## 7. Implementation

### 7.1 Alignment with local development plans

Government has signalled its intention to achieve greater alignment between local authority development plans and the NPF process. Without such change, there would have been a slow ramping up of integration between the RSES and development plans. All local development plans are to be reviewed for 'consistency' with the NPF by 2020. They are to be aligned with the NPF and the RSES and will all be put on the same six-year cycle. This will put pressure on resources at regional and local levels as almost 75% of the region's local authorities were not due to publish new development plans until 2021 at the earliest.

Alignment and interaction between these plans must result in an adequate supply of commercial and residential property, attractive areas to live, availability of skills and higher density, underpinned by required infrastructure. This process will also need to be carefully managed by central government. The mandatory review process must not have adverse consequences on the delivery of housing during 2019 and 2020. For example, delivery of new housing could be postponed until after the local development plan review, which could better deliver higher density and compact development.

All Local Economic and Community Plans (LECPs) must also be consistent with the RSES. The EMRA exercises a degree of oversight over all local plan making. This is further complicated by the presence of smaller, specific local area plans. These local plans will also have to be vetted for consistency by both the responsible local authority and the relevant regional assembly. The regional assembly must ensure adequate resources are in place to carry out its role in reviewing all local plans.

### 7.2 The planning regulator must foster quality planning practices

The new independent Office of the Planning Regulator (OPR) has been established under the Planning and Development (Amendment) Act 2018. The new planning regulator has specific responsibility for monitoring consistency of the local and regional development plans with the NPF. Legislative delays have drastically shortened the OPR's consultative role during the development of the RSES, but it will exercise oversight over the RSES when published. The OPR will also have an oversight function over local development plans, in addition to the Regional Assembly functions. The OPR is to report to the Minister for Housing, Planning and Local Government highlighting areas (if any) of inconsistency between local development plans and the NPF. In such cases, the OPR has the power to make recommendations and suggested draft text to improve consistency in line with proper planning and sustainable development principles.

The OPR's mission will be to provide enhanced oversight of the planning system and help ensure the highest possible standards in planning practice. This should not be limited to specific responsibility for monitoring implementation of the NPF, including zoning decisions. Its remit should be extended to ensuring the planning system functions properly, in a timely manner and is consistent across all local authorities. The OPR should be adequately resourced to carry out its statutory functions. Any evaluation or monitoring of the NPF conducted by Government or the OPR itself must inform its future functioning.

Government should consider expanding the remit of the OPR beyond its statutory duties, by including assessments of the proper functioning of planning systems across all local authorities. Finally, it is worth considering whether the OPR should have a legislative mandate to promote better integration of land and maritime planning. Projects that involve foreshore development currently must go through two separate lengthy consent procedures each involving environmental impact assessment. This has the potential to hinder investment in the region's ports, in marine tourism, and aquaculture.[16]

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[16] Better planning: reforms for sustainable development, Ibec (January 2019) p.17

## 7.3 Capacity within the system needs to be examined

Planning capabilities at local authority level have been reduced over recent years. Yet, local authorities are generally the first point of call on planning matters. Staffing levels across the local authority sector have been reduced by 25% nationally between 2008 and 2014. However, certain local authority functions have been hit disproportionately. The numbers of planners employed in local authorities decreased by a third in the decade to 2014.[17] Dublin's four local authorities saw a reduction of almost 40% in terms of planners employed. While recruitment for key skills has resumed, it is estimated that there has only been an 8% increase in planners employed by local authorities.[18]

Implementation of the NPF on regional, metropolitan and local levels is expected to exert further pressures on public planners. A tightening and competitive labour market due to NDP commitments and private sector investment will compound the demand for planners and other key skills further. So too could the establishment of the Land Development Agency and the OPR.

Sharing of planners and other specialist skills between local authorities must be encouraged. Pooling of talent within the local authority sector will ensure professional and timely planning operations can be maintained. It would allow an individual local authority scale to meet short-term or immediate pressures because planning applications can vary in size, complexity and timeframe.

A programme to upskill existing local authority staff is needed to provide more active role in performing the planning including forward planning, regulatory policy, development management and enforcement. Suitable candidates should be identified from the pool of non-planners employed within planning departments or those in other service areas. Specialist training for professional and technical skills could be developed and contracted specifically for the local authority sector or certain individuals could be enrolled on accredited training programmes.

## 7.4 Monitoring performance

We need to pay close attention on local and regional performance throughout the lifetime of the NPF to ensure the right conditions exist to allow the entire country to succeed. A comprehensive review of the NPF is to be conducted at six-year intervals. The results of each review should be incorporated into the RSES and the MASP. The EMRA should play an active role in each review of the NPF to ensure it continues to shape performance within the region. It should also coordinate the views of the constituent local authorities to present one regional voice during the consultation review phase.

Reviews should be scheduled to guide regional, metropolitan and local development plans to be prepared and to continually inform national capital expenditure programmes. Government and the Oireachtas should also be required to scrutinise legislation for consistency with the NPF and to monitor whether the NPF delivers on national priorities. NPF reveiws are to provide updated population targets that should inform the next applicable phase of local development plans.

Ongoing performance monitoring metrics should be developed and put in place. Development of baseline data will assist in the preparation of evidence-based stategy development and assessment. The EMRA is to make "available the baseline data as a shared evidence base for the region and encourages other public bodies and local authorities to use this data".[19] This data is to be regularly updated.

Ibec welcomes the commitment to develop and publish a "set of robust, relevant and timely Key Regional Indicators for policy making and evaluation".[20] Data is to be updated on a four-yearly cycle. This is too long a timeframe. Everyone should be able to monitor progress of the plan over its lifetime and to see its implementation right down to the local level. A dedicated portal should be established to allow this to occur. Whilst the data set may only fully change once every four-to-five years such as those based on census data, individual measures could be updated as specific data is available.

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[17] Irish Planning Institute Survey of the Planning Profession 2014/2015 (April 2015)
[18] Irish Planning Institute Opening Statement to the Joint Committee on Housing, Planning, Community and Local Government in relation to A Review of Building Regulation, Building Controls and Consumer Protection (13 April 2017)
[19] Draft RSES, p.196
[20] Ibid, p.196

A dedicated portal should be established to allow people to monitor progress of the RSES over its lifetime and to see its implementation right down to the local level. In 2017, Ibec launched the first *Local Economic Indicators* report, an annual study scoring regions and all 31 local authorities on over 30 indicators across 8 categories of competitiveness. The annex to this submission contains the indicators for the region and its 12 constituent local authorities. The indicators are based on data that is openly available. We have detailed and ranked key areas of interest to local and national policymakers, individuals and businesses alike. Regional and individual local breakdowns provide unique economic and social insights. This allows us to better understand the strengths and weaknesses of the economy at a local level.

Indicators can act as a state of play of local and regional competitiveness. Performance monitoring should not be limited to areas that are in direct local control. Many of the included indicators fall outside the remit of local and regional governance structure. They provide an important window to the performance and impact on the ground of national policy. The regional authority should use the indicators developed by Ibec as part of their wider data-inspired performance monitoring approach.

## 7.5 Implementation groups must have a clear mandate

An RSES implementation group will be established to oversee and monitor progress. A separate implementation body is to be tasked with coordinating and monitoring implementation of the MASP. The precsise role of both bodies is vague. The RSES implementation group is to "identify opportunities to drive regional development and leverage new funding, partnership and collaboration opportunities in the region".[21] The MASP implementation group is "oversee and drive implementation of the MASP for Dublin".[22]

Detail is lacking on the exact membership of both groups, how they will interact with themselves, and with the regional assembly itself. The only mention in the draft RSES of membership of either body is that the MASP implementation group will comprise "stakeholders, who will be "critical in the delivery of the RPOs", who "assisted in the delivery of the MASP".[23] There is no mention on how the Joint Urban Area Plans will be monitored. This is simply insufficient. The widest expertise should be sought from internal and external sources in transport provision, housing, infrastructure delivery and industry. It is important that the views of business and the wider economy are represented as this is both a 12-year spatial and and economic strategy.

## 7.6 Leveraging funding sources to finance growth

Although Government is the principal funder of national infrastructure projects, the draft RSES correctly recognises the need to embrace a greater diversity of funding and co-funding options. This poses a challenge to the EMRA and the constituent local authorities. Specialist expertise may be required to make it a reality. Significant work must be undertaken identify appropriate funding sources for specific commitments identified in the draft RSES.

We must look to European sources for funding mechanisms. The region needs to build on its track record of successfully utilising cohesion funding to support economic development during the current and future rounds of EU funding. The draft RSES identified the European Investment Bank (EIB) and the Council of Europe Development Bank as funding sources that should be explored. The EIB is a potential source of funding for long-term capital investment in line with EU 2020 and future priorities. The EIB also has an advisory role, which the region and local authorities should seek out when designing projects, including but not limited to issues of funding.

Peer-to-peer learning between all local authorities and regional assemblies should be encouraged. The National Development Finance Agency could provide advice on working with funding sources such as the EIB. Local authorities should also follow the example of Limerick City and County Council and Fingal County Council in developing a funding framework in partnership with the EIB. These were the first two areas to receive EIB finance for a local authority programme anywhere in Ireland since 1993. Limerick secured €85million to support the Limerick 2030 initiative, a specific urban investment programme for the city. A €70 million Framework Loan Agreement was put in place by Fingal with the EIB, triggering a €180 million investment in

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[21] Ibid, p.197

[22] Ibid, p.191

[23] Ibid, p.191

strategic infrastructure projects. The two local authority projects are different in scope, whilst they both underpin key NPF objectives. They indicate the EIB is open to local and regional projects and provide important example of how such finance can be used to support project delivery.

There are also important national investment and funding mechanisms that must be fully utilised to support delivery of objectives set out in the RSES. These include but are not limited to the role the Ireland Strategic Investment Fund can support infrastructure and corporate lending in the region, enterprise schemes such as the Regional Enterprise Development Fund and the various support schemes for rural towns and villages provided by the Department of Rural and Community Development.

Project Ireland 2040 has introduced four new competitive funding streams (Urban Regeneration and Development Fund, Rural Regeneration and Development, Climate Action Fund and the Disruptive Technologies Fund). Competitive funding streams can improve the effectiveness of regional development. Successful draw-down of some of these funding sources will require regional and local authorities to develop strong local partnerships, particularly with the private sector. It is important that all local stakeholders are engaged early in the development of proposals. Alternative mechanisms to supporting public infrastructure investment should be examined, such as borrowing against future property tax liabilities generated from the resulting development.

## 7.7 Development contribution schemes must support compact, urban growth objectives

Implementation of the NPF at a local level through the development plan process offers an opportunity to examine development contributions and their effects on housing availability and affordability. Development contribution schemes are set for each local authority in respect of public infrastructure and facilities provided by, or on behalf of the local authority that benefit development in the area.[24] They are designed and apportioned across pre-designated classes of public infrastructural development. There is a lack of consistency over the 31 schemes operating across the country and often between neighbouring local authorities.[25]

There is also a general discrepancy between levies on urban and rural residential development. Current schemes tend to favour out-of-town development, where rates can be as much as 50% cheaper. Yet, dispersed development is generally much costlier where the provision of infrastructure is concerned. On the other hand, Limerick City and County Council has designed its development contribution scheme to facilitate urban regeneration and infill of brownfield sites. A special rate (€7 per m²) applies to encourage residential development in key urban cores, which is 65% lower than the county-wide charge. Local authorities within the region should consider replicating this approach to compact growth and urban regeneration (RSO 2). Targeted measures to encourage urban brownfield or infill development would reflect the "fact that infrastructure and services are already provided" and could include a "capped contribution charge at a certain height or above a certain site density".[26]

## 7.8 Local authorities must not frustrate delivery of vital infrastructure

Transparency is needed on the impact local authorities can have in frustrating the delivery of national policies, commitments and infrastructure. Little attention has been given the impact that direct local charges (e.g. commercial rates, development contributions etc) can have on the competitiveness of the local economy. These local costs and charges can also frustrate the provision of much needed infrastructure. to substantially affect the cost base of existing energy generation sites or undermine the attractiveness to develop new infrastructure projects

Local development plans through zoning practices can reduce the availability of land for infrastructure development. These practices must be reduced under the NPF in order to deliver national and regional policy objectives set out in the RSES. For example, past practices have frustrated efforts to meet Ireland's renewable energy needs such as windfarm development. This is not consistent with the stated priority to transition to a low carbon, clean energy and building climate resilience (RSO 8 & 9).

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[24] Under Section 48, Planning and Development Act, 2000, as amended.
[25] Dublin City Council charges €86.40 per m² of residential development but it is on a per-residential unit basis (€8580) in Dún Laoghaire-Rathdown. Meath County Council charges €11,000 per residential unit.
[26] Review of Delivery Costs and Viability for Affordable Residential Developments (2018) p.7

The regulation of noise pollution is complex and evolving. It has the potential to impact not only on urban infrastructure such as roads and airports, but also on rural areas where new wind energy projects are being considered. It will be important to ensure a regional approach to land use zoning and community gain that balances the legitimate interests of transport providers and users, energy providers and users and local communities.

Ireland is costly and overly-restrictive when it comes to road openings across the region's local authorities for utility networks. This impacts the roll-out of broadband and other utilities. Instead, local authorities should encourage commercial investment in economically productive infrastructure through government-backed exemptions from commercial rates and development contributions. This approach could unlock non-exchequer finance to provide additional infrastructure such as 5G fibre-network roll-out.

Recommendations:

- Ensuring alignment with the development plans and ensuring continuity in development opportunity.
- A greater pooling and sharing specialist skills between public bodies, including local authorities, involved in planning and construction must occur.
- Ensure the OPR is adequately resourced to conduct statutory reviews of spatial plans and their compliance with planning guidelines.
- Develop comprehensive and transparent set of regional indicators as part of performance monitoring system, encouraging public debate and better decision-making.
- The RSES and MASP implementation groups should have external representatives with expertise in transport provision, housing, infrastructure delivery and industry.
- The EMRA and constituent local authorities must provide a mechanism to allow the business communities engage with local authorities in terms of developing/supporting projects that could access competitive funding streams.
- The EMRA must provide assistance to all local authorities to develop a funding roadmap specific for their locality.
- The Dublin Metropolitan region, and constituent local authorities within it, should develop an international funding strategy to deliver additional and/or innovative projects that could access sources such as the EIB.
- Minimise the ability of local authorities to frustrate the delivery of national and regional policy objectives through zoning, local charges and other policy tools.
- Introduce government-backed schemes to allow exemptions to local authority charges to unlock non-exchequer investment in infrastructure.

## Annex: Regional and local economic indicators

## Eastern & Midland Regional Assembly

**Population**
Population: 2,328,517
Population density: 164.4 per km²
10-year population change: 15% (National average 12.3%)
Under 35: 49% (National average 47.1%)
Over 65: 12% (National average 13.4%)

**Housing**
Housing stock: 906,940
Housing density: 64 per km² (National average 29.5)
Average household size: 2.8 (National average 2.75)
Mean house price: €202825 (National average €238,820)
Average rent per month: €853.07 (National average €715)

| Key Indicator | Region | Out of 3 regions |
|---|---|---|
| **Skills** | | |
| Participation rate (% LF) | 66.3 | 1 |
| Gender diversity (females as % of LF) | 46.6 | 1 |
| Third level graduates (% LF) | 46.4 | 1 |
| Concentration of STEM-grads (% LF) | 7.9 | 1 |
| **Broadband** | | |
| Broadband (% premises) | 88 | 1 |
| National Broadband Plan Dependency (% of premises) | 11 | 3 |
| **Travel** | | |
| State airport travel time (minutes) | 34 (DUB) | 1 |
| Regional airport travel time (minutes) | 122 (WAT) | 3 |
| Tier 1 or 2 port travel time (minutes) | 37 (DUB) | 2 |
| Road Quality (% road surface rated 7-10) | 61.8 | 3 |
| Commuting by private vehicle (%) | 67.7 | 3 |
| Commute of 30 minutes or less (%) | 49.6 | 3 |
| Commute over 60 minutes (%) | 14.3 | 1 |
| **Tourism** | | |
| Overseas € per 10,000 population | 23.7m | 1 |
| Accommodation capacity (hotel beds) | 60,997 | 1 |
| **Enterprise** | | |
| IDA jobs per 10,000 (LF) | 1076.6 | 1 |
| LEO jobs per 10,000 (LF) | 136 | 3 |
| EI jobs per 10,000 (LF) | 1,098.6 | 1 |

## Laois

**Population**

Population: 84,697
Population density: 49.7 per km²
10-year population change: 26.3% (National average 12.3%)
Under 35: 49.4% (National average 47.1%)
Over 65: 11.3% (National average 13.4%)

**Housing**

Housing stock: 32,794
Housing density: 19.2 per km² (National average 29.5)
Average household size: 2.87 (National average 2.75)
Mean house price: €138,248 (National average €238,820)
Average rent per month: €688 (National average €715)

Largest town/city:
Portlaoise (22,050)

| | Key Indicator | Laois | Out of 31 LAs | Nat' Average | Highest | Lowest |
|---|---|---|---|---|---|---|
| **Skills** | Participation rate (% LF) | 62.8 | 21 | 65.2 | Fingal (69.1) | Cork City (58.3) |
| | Gender diversity (females as % of LF) | 44.4 | 27 | 46.3 | Galway City (49.5) | Cavan (44.0) |
| | Third level graduates (% LF) | 33.3 | 27 | 43.3 | Dun Laoghaire (74.1) | Cavan (30.7) |
| | Concentration of STEM-grads (% LF) | 4.4 | 26 | 7.1 | Galway City (13.0) | Monaghan (3.6) |
| **Broadband** | Broadband (% premises) | 62% | 14/26 counties | 73 | Dublin (98) | Leitrim (40) |
| | National Broadband Plan Dependency (% of premises) | 33 | 13/26 counties | 23 | Leitrim (51) | Dublin (1.6) |
| **Travel** | State airport travel time (minutes) | 75 (DUB) | 16 | 71 | Fingal (7) | Donegal (165) |
| | Regional airport travel time (minutes) | 100 (WAT) | 20 (joint) | 86 | Waterford (17) | Monaghan (160) |
| | Tier 1 or 2 port travel time (minutes) | 80 (W) | 19 | 67 | Dublin City/ Waterford (14) | Donegal (175) |
| | Road Quality (% road surface rated 7-10) | 46.5 | 30 | 66.5 | Galway City (87) | Fingal (43) |
| | Commuting by private vehicle (%) | 88.3 | 20 | 77.2 | Dublin City (41.4) | Roscommon (93.0) |
| | Commute of 30 minutes or less (%) | 56.1 | 23 | 57.0 | Galway City (74.0) | Fingal (43.5) |
| | Commute over 60 minutes (%) | 19.5 | 28 | 11.6 | Cork City (3.9) | Wicklow (21.7) |
| **Tourism** | Overseas € per 10,000 population | 1.65m | 26/26 counties | 10.34m | Galway (22.82m) | Laois (1.65m) |
| | Accommodation capacity (hotel beds) | 1,377 | 20/26 counties | 5,500 | Dublin (44,677) | Longford (155) |
| **Enterprise** | IDA jobs per 10,000 (LF) | 34.9 | 26/26 counties | 1,034.9 | Galway (1,589.6) | Laois (34.9) |
| | LEO jobs per 10,000 (LF) | 169.8 | 20/30 LAs | 184.3 | Longford (763.0) | Fingal (72.5) |
| | EI jobs per 10,000 (LF) | 432.4 | 26/26 counties | 1,029.5 | Monaghan (2,078.9) | Laois (432.4) |

# Longford

**Population**
Population: 40,873
Population density: 39.7 per km²
10-year population change: 18.8% (National average 12.3%)
Under 35: 46.7% (National average 47.1%)
Over 65: 14.2% (National average 13.4%)

**Housing**
Housing stock: 18,591
Housing density: 18.0 per km² (National average 29.5)
Average household size: 2.70 (National average 2.75)
Mean house price: €184,236 (National average €238,820)
Average rent per month: €500 (National average €715)

Largest town/city:
**Longford Town (10,008)**

| | Key Indicator | Longford | Out of 31 LAs | Nat' Average | Highest | Lowest |
|---|---|---|---|---|---|---|
| **Skills** | Participation rate (% LF) | 60.7 | 28 | 65.2 | Fingal (69.1) | Cork City (58.3) |
| | Gender diversity (females as % of LF) | 44.3 | 28 | 46.3 | Galway City (49.5) | Cavan (44.0) |
| | Third level graduates (% LF) | 32.7 | 28 | 43.3 | Dun Laoghaire (74.1) | Cavan (30.7) |
| | Concentration of STEM-grads (% LF) | 4.7 | 25 | 7.1 | Galway City (13.0) | Monaghan (3.6) |
| **Broadband** | Broadband (% premises) | 54 | 21/26 counties | 73 | Dublin (98) | Leitrim (40) |
| | National Broadband Plan Dependency (% of premises) | 37 | 7/26 counties | 23 | Leitrim (51) | Dublin (1.6) |
| **Travel** | State airport travel time (minutes) | 88 (DUB) | 21 | 71 | Fingal (7) | Donegal (165) |
| | Regional airport travel time (minutes) | 65 (NOC) | 11 | 86 | Waterford (17) | Monaghan (160) |
| | Tier 1 or 2 port travel time (minutes) | 90 (D) | 23 (joint) | 67 | Dublin City/ Waterford (14) | Donegal (175) |
| | Road Quality (% road surface rated 7-10) | 58.5 | 20 | 66.5 | Galway City (87) | Fingal (43) |
| | Commuting by private vehicle (%) | 88.1 | 17 | 77.2 | Dublin City (41.4) | Roscommon (93.0) |
| | Commute of 30 minutes or less (%) | 66.6 | 9 | 57.0 | Galway City (74.0) | Fingal (43.5) |
| | Commute over 60 minutes (%) | 11.6 | 19 | 11.6 | Cork City (3.9) | Wicklow (21.7) |
| **Tourism** | Overseas € per 10,000 population | 2.45m | 23/26 counties | 10.34m | Galway (22.82m) | Laois (1.65m) |
| | Accommodation capacity (hotel beds) | 155 | 26/26 counties | 5,500 | Dublin (44,677) | Longford (155) |
| **Enterprise** | IDA jobs per 10,000 (LF) | 305.8 | 21/26 counties | 1,034.9 | Galway (1,589.6) | Laois (34.9) |
| | LEO jobs per 10,000 (LF) | 763.0 | 1/30 LAs | 184.3 | Longford (763.0) | Fingal (72.5) |
| | EI jobs per 10,000 (LF) | 1,916.3 | 2/26 counties | 1,029.5 | Monaghan (2,078.9) | Laois (432.4) |

## Offaly

**Population**
Population: 77,961
Population density: 39.5 per km²
10-year population change: 10.0% (National average 12.3%)
Under 35: 46.9% (National average 47.1%)
Over 65: 13.6% (National average 13.4%)

**Housing**
Housing stock: 30,740
Housing density: 15.6 per km² (National average 29.5)
Average household size: 2.84 (National average 2.75)
Mean house price: €124,894 (National average €238,820)
Average rent per month: €617 (National average €715)

Largest town/city:
Tullamore (14,607)

| | Key Indicator | Offaly | Out of 31 LAs | Nat' Average | Highest | Lowest |
|---|---|---|---|---|---|---|
| **Skills** | Participation rate (% LF) | 61.2 | 24 | 65.2 | Fingal (69.1) | Cork City (58.3) |
| | Gender diversity (females as % of LF) | 44.3 | 29 | 46.3 | Galway City (49.5) | Cavan (44.0) |
| | Third level graduates (% LF) | 31.5 | 29 | 43.3 | Dun Laoghaire (74.1) | Cavan (30.7) |
| | Concentration of STEM-grads (% LF) | 4.0 | 29 | 7.1 | Galway City (13.0) | Monaghan (3.6) |
| **Broadband** | Broadband (% premises) | 59 | 16/26 counties | 73 | Dublin (98) | Leitrim (40) |
| | National Broadband Plan Dependency (% of premises) | 34 | 11/26 counties | 23 | Leitrim (51) | Dublin (1.6) |
| **Travel** | State airport travel time (minutes) | 70 (DUB) | 15 | 71 | Fingal (7) | Donegal (165) |
| | Regional airport travel time (minutes) | 100 (NOC) | 20 (joint) | 86 | Waterford (17) | Monaghan (160) |
| | Tier 1 or 2 port travel time (minutes) | 88 (D) | 20 (joint) | 67 | Dublin City/ Waterford (14) | Donegal (175) |
| | Road Quality (% road surface rated 7-10) | 53.5 | 25 | 66.5 | Galway City (87) | Fingal (43) |
| | Commuting by private vehicle (%) | 88.0 | 16 | 77.2 | Dublin City (41.4) | Roscommon (93.0) |
| | Commute of 30 minutes or less (%) | 60.5 | 21 | 57.0 | Galway City (74.0) | Fingal (43.5) |
| | Commute over 60 minutes (%) | 15.3 | 24 | 11.6 | Cork City (3.9) | Wicklow (21.7) |
| **Tourism** | Overseas € per 10,000 population | 2.05m | 25/26 counties | 10.34m | Galway (22.82m) | Laois (1.65m) |
| | Accommodation capacity (hotel beds) | 936 | 22/26 counties | 5,500 | Dublin (44,677) | Longford (155) |
| **Enterprise** | IDA jobs per 10,000 (LF) | 305.6 | 22/26 counties | 1,034.9 | Galway (1,589.6) | Laois (34.9) |
| | LEO jobs per 10,000 (LF) | 329.4 | 11/30 LAs | 184.3 | Longford (763.0) | Fingal (72.5) |
| | EI jobs per 10,000 (LF) | 1,391.9 | 4/26 counties | 1,029.5 | Monaghan (2,078.9) | Laois (432.4) |

# Westmeath

**Population**
Population: 88,770
Population density: 50.9 per km²
10-year population change: 11.9% (National average 12.3%)
Under 35: 47.8% (National average 47.1%)
Over 65: 12.8% (National average 13.4%)

**Housing**
Housing stock: 36,890
Housing density: 21.2 per km² (National average 29.5)
Average household size: 2.76 (National average 2.75)
Mean house price: €128,549 (National average €238,820)
Average rent per month: €655 (National average €715)

Largest town/city:
Athlone (21,349)

| Key Indicator | Westmeath | Out of 31 LAs | Nat' Average | Highest | Lowest |
|---|---|---|---|---|---|
| **Skills** | | | | | |
| Participation rate (% LF) | 62.3 | 23 | 65.2 | Fingal (69.1) | Cork City (58.3) |
| Gender diversity (females as % of LF) | 45.3 | 21 | 46.3 | Galway City (49.5) | Cavan (44.0) |
| Third level graduates (% LF) | 38.9 | 17 | 43.3 | Dun Laoghaire (74.1) | Cavan (30.7) |
| Concentration of STEM-grads (% LF) | 6.8 | 11 | 7.1 | Galway City (13.0) | Monaghan (3.6) |
| **Broadband** | | | | | |
| Broadband (% premises) | 69 | 9/26 counties | 73 | Dublin (98) | Leitrim (40) |
| National Broadband Plan Dependency (% of premises) | 27 | 19/26 counties | 23 | Leitrim (51) | Dublin (1.6) |
| **Travel** | | | | | |
| State airport travel time (minutes) | 80 (DUB) | 18 | 71 | Fingal (7) | Donegal (165) |
| Regional airport travel time (minutes) | 75 (NOC) | 13 | 86 | Waterford (17) | Monaghan (160) |
| Tier 1 or 2 port travel time (minutes) | 88 (D) | 20 (joint) | 67 | Dublin City/ Waterford (14) | Donegal (175) |
| Road Quality (% road surface rated 7-10) | 61.5 | 18 | 66.5 | Galway City (87) | Fingal (43) |
| Commuting by private vehicle (%) | 86.1 | 11 | 77.2 | Dublin City (41.4) | Roscommon (93.0) |
| Commute of 30 minutes or less (%) | 63.2 | 17 | 57.0 | Galway City (74.0) | Fingal (43.5) |
| Commute over 60 minutes (%) | 16.5 | 26 | 11.6 | Cork City (3.9) | Wicklow (21.7) |
| **Tourism** | | | | | |
| Overseas € per 10,000 population | 5.18m | 14/26 counties | 10.34m | Galway (22.82m) | Laois (1.65m) |
| Accommodation capacity (hotel beds) | 2,733 | 15/26 counties | 5,500 | Dublin (44,677) | Longford (155) |
| **Enterprise** | | | | | |
| IDA jobs per 10,000 (LF) | 778.4 | 10/26 counties | 1,034.9 | Galway (1,589.6) | Laois (34.9) |
| LEO jobs per 10,000 (LF) | 425.4 | 3/30 LAs | 184.3 | Longford (763.0) | Fingal (72.5) |
| EI jobs per 10,000 (LF) | 1,042.2 | 11/26 counties | 1,029.5 | Monaghan (2,078.9) | Laois (432.4) |

## Louth

**Population**
Population: 128,884
Population density: 157.6 per km²
10-year population change: 15.8% (National average 12.3%)
Under 35: 48.2% (National average 47.1%)
Over 65: 12.5% (National average 13.4%)

**Housing**
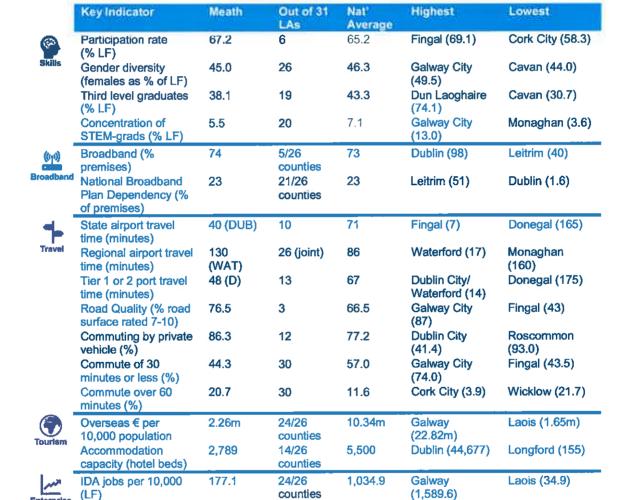Housing stock: 51,399
Housing density: 62.8 per km² (National average 29.5)
Average household size: 2.81 (National average 2.75)
Mean house price: €171,449 (National average €238,820)
Average rent per month: €826 (National average €715)

Largest town/city:
**Drogheda (40,956)**

| | Key Indicator | Louth | Out of 31 LAs | Nat' Average | Highest | Lowest |
|---|---|---|---|---|---|---|
| **Skills** | Participation rate (% LF) | 61.8 | 26 | 65.2 | Fingal (69.1) | Cork City (58.3) |
| | Gender diversity (females as % of LF) | 46.3 | 11 | 46.3 | Galway City (49.5) | Cavan (44.0) |
| | Third level graduates (% LF) | 37.4 | 23 | 43.3 | Dun Laoghaire (74.1) | Cavan (30.7) |
| | Concentration of STEM-grads (% LF) | 5.7 | 17 | 7.1 | Galway City (13.0) | Monaghan (3.6) |
| **Broadband** | Broadband (% premises) | 85 | 2/26 counties | 73 | Dublin (98) | Leitrim (40) |
| | National Broadband Plan Dependency (% of premises) | 14 | 25/26 counties | 23 | Leitrim (51) | Dublin (1.6) |
| **Travel** | State airport travel time (minutes) | 34 (DUB) | 9 | 71 | Fingal (7) | Donegal (165) |
| | Regional airport travel time (minutes) | 150 (WAT) | 29 | 86 | Waterford (17) | Monaghan (160) |
| | Tier 1 or 2 port travel time (minutes) | 43 (D) | 11 | 67 | Dublin City/ Waterford (14) | Donegal (175) |
| | Road Quality (% road surface rated 7-10) | 63 | 16 | 66.5 | Galway City (87) | Fingal (43) |
| | Commuting by private vehicle (%) | 80.3 | 7 | 77.2 | Dublin City (41.4) | Roscommon (93.0) |
| | Commute of 30 minutes or less (%) | 63.8 | 16 | 57.0 | Galway City (74.0) | Fingal (43.5) |
| | Commute over 60 minutes (%) | 14.6 | 22 | 11.6 | Cork City (3.9) | Wicklow (21.7) |
| **Tourism** | Overseas € per 10,000 population | 4.27m | 17/26 counties | 10.34m | Galway (22.82m) | Laois (1.65m) |
| | Accommodation capacity (hotel beds) | 1,826 | 19/26 counties | 5,500 | Dublin (44,677) | Longford (155) |
| **Enterprise** | IDA jobs per 10,000 (LF) | 720.9 | 11/26 counties | 1,034.9 | Galway (1,589.6) | Laois (34.9) |
| | LEO jobs per 10,000 (LF) | 180.5 | 19/30 LAs | 184.3 | Longford (763.0) | Fingal (72.5) |
| | EI jobs per 10,000 (LF) | 1,192.0 | 7/26 counties | 1,029.5 | Monaghan (2,078.9) | Laois (432.4) |

## Meath

**Population**
Population: 195,044
Population density: 84.4 per km²
10-year population change: 19.8% (National average 12.3%)
Under 35: 48.8% (National average 47.1%)
Over 65: 10.7% (National average 13.4%)

**Housing**
Housing stock: 70,649
Housing density: 30.6 per km² (National average 29.5)
Average household size: 3.03 (National average 2.75)
Mean house price: €234,370 (National average €238,820)
Average rent per month: €925 (National average €715)

Largest town/city:
Navan (30,173)

| Key Indicator | Meath | Out of 31 LAs | Nat' Average | Highest | Lowest |
|---|---|---|---|---|---|
| Participation rate (% LF) | 67.2 | 6 | 65.2 | Fingal (69.1) | Cork City (58.3) |
| Gender diversity (females as % of LF) | 45.0 | 26 | 46.3 | Galway City (49.5) | Cavan (44.0) |
| Third level graduates (% LF) | 38.1 | 19 | 43.3 | Dun Laoghaire (74.1) | Cavan (30.7) |
| Concentration of STEM-grads (% LF) | 5.5 | 20 | 7.1 | Galway City (13.0) | Monaghan (3.6) |
| Broadband (% premises) | 74 | 5/26 counties | 73 | Dublin (98) | Leitrim (40) |
| National Broadband Plan Dependency (% of premises) | 23 | 21/26 counties | 23 | Leitrim (51) | Dublin (1.6) |
| State airport travel time (minutes) | 40 (DUB) | 10 | 71 | Fingal (7) | Donegal (165) |
| Regional airport travel time (minutes) | 130 (WAT) | 26 (joint) | 86 | Waterford (17) | Monaghan (160) |
| Tier 1 or 2 port travel time (minutes) | 48 (D) | 13 | 67 | Dublin City/ Waterford (14) | Donegal (175) |
| Road Quality (% road surface rated 7-10) | 76.5 | 3 | 66.5 | Galway City (87) | Fingal (43) |
| Commuting by private vehicle (%) | 86.3 | 12 | 77.2 | Dublin City (41.4) | Roscommon (93.0) |
| Commute of 30 minutes or less (%) | 44.3 | 30 | 57.0 | Galway City (74.0) | Fingal (43.5) |
| Commute over 60 minutes (%) | 20.7 | 30 | 11.6 | Cork City (3.9) | Wicklow (21.7) |
| Overseas € per 10,000 population | 2.26m | 24/26 counties | 10.34m | Galway (22.82m) | Laois (1.65m) |
| Accommodation capacity (hotel beds) | 2,789 | 14/26 counties | 5,500 | Dublin (44,677) | Longford (155) |
| IDA jobs per 10,000 (LF) | 177.1 | 24/26 counties | 1,034.9 | Galway (1,589.6) | Laois (34.9) |
| LEO jobs per 10,000 (LF) | 133.8 | 24/30 LAs | 184.3 | Longford (763.0) | Fingal (72.5) |
| EI jobs per 10,000 (LF) | 867.5 | 15/26 counties | 1,029.5 | Monaghan (2,078.9) | Laois (432.4) |

## Dublin City

**Population**
Population: 554,554
Population density: 4,780.2 per km²
10-year population change: 9.5% (National average 12.3%)
Under 35: 49.8% (National average 47.1%)
Over 65: 13.0% (National average 13.4%)

**Housing**
Housing stock: 240,533
Housing density: 2073.4 per km² (National average 29.5)
Average household size: 2.48 (National average 2.75)
Mean house price: €382,618 (National average €238,820)
Average rent per month: €1,392 (National average €715)

Largest town/city:
Dublin City (554,554)

| | Key Indicator | Dublin City | Out of 31 LAs | Nat' Average | Highest | Lowest |
|---|---|---|---|---|---|---|
| **Skills** | Participation rate (% LF) | 67.7 | 3 | 65.2 | Fingal (69.1) | Cork City (58.3) |
| | Gender diversity (females as % of LF) | 47.8 | 3 | 46.3 | Galway City (49.5) | Cavan (44.0) |
| | Third level graduates (% LF) | 50.7 | 3 | 43.3 | Dun Laoghaire (74.1) | Cavan (30.7) |
| | Concentration of STEM-grads (% LF) | 9.7 | 4 | 7.1 | Galway City (13.0) | Monaghan (3.6) |
| **Broadband** | Broadband (% premises) | 98 | 1/26 counties | 70.4 | 73 | Dublin (98) |
| | National Broadband Plan Dependency (% of premises) | 1.6 | 26/26 counties | 22.8 | 23 | Leitrim (51) |
| **Travel** | State airport travel time (minutes) | 15 (DUB) | 4 | 71 | Fingal (7) | Donegal (165) |
| | Regional airport travel time (minutes) | 130 (WAT) | 26 (joint) | 86 | Waterford (17) | Monaghan (160) |
| | Tier 1 or 2 port travel time (minutes) | 14 (D) | 1 (joint) | 67 | Dublin City/ Waterford (14) | Donegal (175) |
| | Road Quality (% road surface rated 7-10) | 58 | 21 | 66.5 | Galway City (87) | Fingal (43) |
| | Commuting by private vehicle (%) | 41.4 | 1 | 77.2 | Dublin City (41.4) | Roscommon (93.0) |
| | Commute of 30 minutes or less (%) | 51.2 | 25 | 57.0 | Galway City (74.0) | Fingal (43.5) |
| | Commute over 60 minutes (%) | 8.6 | 10 | 11.6 | Cork City (3.9) | Wicklow (21.7) |
| **Tourism** | Overseas € per 10,000 population | 14.70m | 3/26 counties | 10.34m | Galway (22.82m) | Laois (1.65m) |
| | Accommodation capacity (hotel beds) | 44,677 | 1/26 counties | 5,500 | Dublin (44,677) | Longford (155) |
| **Enterprise** | IDA jobs per 10,000 (LF) | 1,416.7 | 4/26 counties | 1,034.9 | Galway (1,589.6) | Laois (34.9) |
| | LEO jobs per 10,000 (LF) | 73.4 | 29/30 LAs | 184.3 | Longford (763.0) | Fingal (72.5) |
| | EI jobs per 10,000 (LF) | 1,162.3 | 8/26 counties | 1,029.5 | Monaghan (2,078.9) | Laois (432.4) |

# Dún Laoghaire-Rathdown

**Population**
Population: 218,018
Population density: 1729.2 per km²
10-year population change: 12.4% (National average 12.3%)
Under 35: 45.6% (National average 47.1%)
Over 65: 15.9% (National average 13.4%)

**Housing**
Housing stock: 86,962
Housing density: 686.7 per km² (National average 29.5)
Average household size: 2.72 (National average 2.75)
Mean house price: €382,618 (National average €238,820)
Average rent per month: €1,392 (National average €715)

Largest town/city:
**Dún Laoghaire**
(44,055)

| Key Indicator | Dún Laoghaire | Out of 31 LAs | Nat' Average | Highest | Lowest |
|---|---|---|---|---|---|
| **Skills** | | | | | |
| Participation rate (% LF) | 67.5 | 4 | 65.2 | Fingal (69.1) | Cork City (58.3) |
| Gender diversity (females as % of LF) | 47.5 | 4 | 46.3 | Galway City (49.5) | Cavan (44.0) |
| Third level graduates (% LF) | 74.1 | 1 | 43.3 | Dun Laoghaire (74.1) | Cavan (30.7) |
| Concentration of STEM-grads (% LF) | 12.1 | 2 | 7.1 | Galway City (13.0) | Monaghan (3.6) |
| **Broadband** | | | | | |
| Broadband (% premises) | 98.3 | 1/26 counties | 70.4 | Dublin (98.1) | Roscommon (38.0) |
| National Broadband Plan Dependency (% of premises) | 1.6 | 26/26 counties | 22.8 | Leitrim (50.6) | Dublin (1.6) |
| **Travel** | | | | | |
| State airport travel time (minutes) | 33 (DUB) | 8 | 71 | Fingal (7) | Donegal (165) |
| Regional airport travel time (minutes) | 125 (WAT) | 25 | 86 | Waterford (17) | Monaghan (160) |
| Tier 1 or 2 port travel time (minutes) | 23 (D) | 6 | 67 | Dublin City/ Waterford (14) | Donegal (175) |
| Road Quality (% road surface rated 7-10) | 59.5 | 19 | 66.5 | Galway City (87) | Fingal (43) |
| Commuting by private vehicle (%) | 60.5 | 2 | 77.2 | Dublin City (41.4) | Roscommon (93.0) |
| Commute of 30 minutes or less (%) | 45.9 | 28 | 57.0 | Galway City (74.0) | Fingal (43.5) |
| Commute over 60 minutes (%) | 10.0 | 13 | 11.6 | Cork City (3.9) | Wicklow (21.7) |
| **Tourism** | | | | | |
| Overseas € per 10,000 population | 14.70m | 3/26 counties | 10.34m | Galway (22.82m) | Laois (1.65m) |
| Accommodation capacity (hotel beds) | 44,677 | 1/26 counties | 5,500 | Dublin (44,677) | Longford (155) |
| **Enterprise** | | | | | |
| IDA jobs per 10,000 (LF) | 1,416.7 | 4/26 counties | 1,034.9 | Galway (1,589.6) | Laois (34.9) |
| LEO jobs per 10,000 (LF) | 163.0 | 21/30 LAs | 184.3 | Longford (763.0) | Fingal (72.5) |
| EI jobs per 10,000 (LF) | 1,162.3 | 8/26 counties | 1,029.5 | Monaghan (2,078.9) | Laois (432.4) |

## Fingal

**Population**
Population: 296,020
Population density: 651.1 per km²
10-year population change: 23.3% (National average 12.3%)
Under 35: 50.8% (National average 47.1%)
Over 65: 9.1% (National average 13.4%)

**Housing**
Housing stock: 104,851
Housing density: 230.8 per km² (National average 29.5)
Average household size: 3.03 (National average 2.75)
Mean house price: €382,618 (National average €238,820)
Average rent per month: €1,392 (National average €715)

**Largest town/city: Swords (39,248)**

| | Key Indicator | Fingal | Out of 31 LAs | Nat' Average | Highest | Lowest |
|---|---|---|---|---|---|---|
| **Skills** | Participation rate (% LF) | 69.1 | 1 | 65.2 | Fingal (69.1) | Cork City (58.3) |
| | Gender diversity (females as % of LF) | 46.9 | 8 | 46.3 | Galway City (49.5) | Cavan (44.0) |
| | Third level graduates (% LF) | 45.1 | 6 | 43.3 | Dun Laoghaire (74.1) | Cavan (30.7) |
| | Concentration of STEM-grads (% LF) | 8.1 | 5 | 7.1 | Galway City (13.0) | Monaghan (3.6) |
| **Broadband** | Broadband (% premises) | 98.3 | 1/26 counties | 70.4 | Dublin (98.1) | Roscommon (38.0) |
| | National Broadband Plan Dependency (% of premises) | 1.6 | 26/26 counties | 22.8 | Leitrim (50.6) | Dublin (1.6) |
| **Travel** | State airport travel time (minutes) | 7 (DUB) | 1 | 71 | Fingal (7) | Donegal (165) |
| | Regional airport travel time (minutes) | 130 (WAT) | 26 (joint) | 86 | Waterford (17) | Monaghan (160) |
| | Tier 1 or 2 port travel time (minutes) | 16 (D) | 3 (joint) | 67 | Dublin City/ Waterford (14) | Donegal (175) |
| | Road Quality (% road surface rated 7-10) | 43 | 31 | 66.5 | Galway City (87) | Fingal (43) |
| | Commuting by private vehicle (%) | 69.5 | 5 | 77.2 | Dublin City (41.4) | Roscommon (93.0) |
| | Commute of 30 minutes or less (%) | 43.5 | 5 | 57.0 | Galway City (74.0) | Fingal (43.5) |
| | Commute over 60 minutes (%) | 16.7 | 27 | 11.6 | Cork City (3.9) | Wicklow (21.7) |
| **Tourism** | Overseas € per 10,000 population | 14.70m | 3/26 counties | 10.34m | Galway (22.82m) | Laois (1.65m) |
| | Accommodation capacity (hotel beds) | 44,677 | 1/26 counties | 5,500 | Dublin (44,677) | Longford (155) |
| **Enterprise** | IDA jobs per 10,000 (LF) | 1,416.7 | 4/26 counties | 1,034.9 | Galway (1,589.6) | Laois (34.9) |
| | LEO jobs per 10,000 (LF) | 72.5 | 30/30 LAs | 184.3 | Longford (763.0) | Fingal (72.5) |
| | EI jobs per 10,000 (LF) | 1,162.3 | 8/26 counties | 1,029.5 | Monaghan (2,078.9) | Laois (432.4) |

## South Dublin

**Population**
Population: 278,767
Population density: 1260 per km²
10-year population change: 12.9% (National average 12.3%)
Under 35: 50.1% (National average 47.1%)
Over 65: 11.1% (National average 13.4%)

**Housing**
Housing stock: 98,387
Housing density: 444.7 per km² (National average 29.5)
Average household size: 3.00 (National average 2.75)
Mean house price: €382,618 (National average €238,820)
Average rent per month: €1,392 (National average €715)

Largest town/city:
Tallaght (79,087)

| Key Indicator | South Dublin | Out of 31 LAs | Nat' Average | Highest | Lowest |
|---|---|---|---|---|---|
| **Skills** | | | | | |
| Participation rate (% LF) | 65.9 | 11 | 65.2 | Fingal (69.1) | Cork City (58.3) |
| Gender diversity (females as % of LF) | 47.4 | 5 | 46.3 | Galway City (49.5) | Cavan (44.0) |
| Third level graduates (% LF) | 39.8 | 14 | 43.3 | Dun Laoghaire (74.1) | Cavan (30.7) |
| Concentration of STEM-grads (% LF) | 7.1 | 8 | 7.1 | Galway City (13.0) | Monaghan (3.6) |
| **Broadband** | | | | | |
| Broadband (% premises) | 98.3 | 1/26 counties | 70.4 | Dublin (98.1) | Roscommon (38.0) |
| National Broadband Plan Dependency (% of premises) | 1.6 | 26/26 counties | 22.8 | Leitrim (50.6) | Dublin (1.6) |
| **Travel** | | | | | |
| State airport travel time (minutes) | 23 (DUB) | 6 | 71 | Fingal (7) | Donegal (165) |
| Regional airport travel time (minutes) | 135 (WAT) | 29 | 86 | Waterford (17) | Monaghan (160) |
| Tier 1 or 2 port travel time (minutes) | 31 (D) | 8 | 67 | Dublin City/ Waterford (14) | Donegal (175) |
| Road Quality (% road surface rated 7-10) | 85.5 | 2 | 66.5 | Galway City (87) | Fingal (43) |
| Commuting by private vehicle (%) | 73.2 | 6 | 77.2 | Dublin City (41.4) | Roscommon (93.0) |
| Commute of 30 minutes or less (%) | 48.7 | 26 | 57.0 | Galway City (74.0) | Fingal (43.5) |
| Commute over 60 minutes (%) | 12.3 | 20 | 11.6 | Cork City (3.9) | Wicklow (21.7) |
| **Tourism** | | | | | |
| Overseas € per 10,000 population | 14.70m | 3/26 counties | 10.34m | Galway (22.82m) | Laois (1.65m) |
| Accommodation capacity (hotel beds) | 44,677 | 1/26 counties | 5,500 | Dublin (44,677) | Longford (155) |
| **Enterprise** | | | | | |
| IDA jobs per 10,000 (LF) | 1,417 | 4/26 counties | 1,034.9 | Galway (1,589.6) | Laois (34.9) |
| LEO jobs per 10,000 (LF) | 118.4 | 26/30 LAs | 184.3 | Longford (763.0) | Fingal (72.5) |
| EI jobs per 10,000 (LF) | 1,162.3 | 8/26 counties | 1,029.5 | Monaghan (2,078.9) | Laois (432.4) |

## Kildare

**Population**
Population: 222,504
Population density: 132.8 per km²
10-year population change: 19.4% (National average 12.3%)
Under 35: 49.8% (National average 47.1%)
Over 65: 9.9% (National average 13.4%)

**Housing**
Housing stock: 80,158
Housing density: 47.8 per km² (National average 29.5)
Average household size: 3.00 (National average 2.75)
Mean house price: €249,702 (National average €238,820)
Average rent per month: €1,020 (National average €715)

Largest town/city:
Newbridge (22,742)

| Key Indicator | Kildare | Out of 31 LAs | Nat' Average | Highest | Lowest |
|---|---|---|---|---|---|
| **Skills** | | | | | |
| Participation rate (% LF) | 66.1 | 9 | 65.2 | Fingal (69.1) | Cork City (58.3) |
| Gender diversity (females as % of LF) | 45.7 | 19 | 46.3 | Galway City (49.5) | Cavan (44.0) |
| Third level graduates (% LF) | 43.5 | 8 | 43.3 | Dun Laoghaire (74.1) | Cavan (30.7) |
| Concentration of STEM-grads (% LF) | 7.4 | 6 | 7.1 | Galway City (13.0) | Monaghan (3.6) |
| **Broadband** | | | | | |
| Broadband (% premises) | 84 | 3/26 counties | 73 | Dublin (98) | Leitrim (40) |
| National Broadband Plan Dependency (% of premises) | 15 | 24/26 counties | 23 | Leitrim (51) | Dublin (1.6) |
| **Travel** | | | | | |
| State airport travel time (minutes) | 58 (DUB) | 12 | 71 | Fingal (7) | Donegal (165) |
| Regional airport travel time (minutes) | 93 (WAT) | 19 | 86 | Waterford (17) | Monaghan (160) |
| Tier 1 or 2 port travel time (minutes) | 55 (D) | 15 (joint) | 67 | Dublin City/ Waterford (14) | Donegal (175) |
| Road Quality (% road surface rated 7-10) | 61.5 | 17 | 66.5 | Galway City (87) | Fingal (43) |
| Commuting by private vehicle (%) | 69.5 | 5 | 77.2 | Dublin City (41.4) | Roscommon (93.0) |
| Commute of 30 minutes or less (%) | 46.0 | 27 | 57.0 | Galway City (74.0) | Fingal (43.5) |
| Commute over 60 minutes (%) | 19.9 | 29 | 11.6 | Cork City (3.9) | Wicklow (21.7) |
| **Tourism** | | | | | |
| Overseas € per 10,000 population | 4.09m | 19/26 counties | 10.34m | Galway (22.82m) | Laois (1.65m) |
| Accommodation capacity (hotel beds) | 3,174 | 12/26 counties | 5,500 | Dublin (44,677) | Longford (155) |
| **Enterprise** | | | | | |
| IDA jobs per 10,000 (LF) | 955.3 | 7/26 counties | 1,034.9 | Galway (1,589.6) | Laois (34.9) |
| LEO jobs per 10,000 (LF) | 101.0 | 27/30 LAs | 184.3 | Longford (763.0) | Fingal (72.5) |
| EI jobs per 10,000 (LF) | 940.1 | 13/26 counties | 1,029.5 | Monaghan (2,078.9) | Laois (432.4) |

# Wicklow

**Population**
Population: 142,425
Population density: 71.6 per km²
10-year population change: 12.9% (National average 12.3%)
Under 35: 45.9% (National average 47.1%)
Over 65: 13.0% (National average 13.4%)

**Housing**
Housing stock: 54,986
Housing density: 27.6 per km² (National average 29.5)
Average household size: 2.86 (National average 2.75)
Mean house price: €311,365 (National average €238,820)
Average rent per month: €1,055 (National average €715)

Largest town/city:
Bray (32,600)

| Key Indicator | Wicklow | Out of 31 LAs | Nat' Average | Highest | Lowest |
|---|---|---|---|---|---|
| **Skills** | | | | | |
| Participation rate (% LF) | 65.3 | 14 | 65.2 | Fingal (69.1) | Cork City (58.3) |
| Gender diversity (females as % of LF) | 46.3 | 12 | 46.3 | Galway City (49.5) | Cavan (44.0) |
| Third level graduates (% LF) | 45.4 | 5 | 43.3 | Dun Laoghaire (74.1) | Cavan (30.7) |
| Concentration of STEM-grads (% LF) | 7.3 | 7 | 7.1 | Galway City (13.0) | Monaghan (3.6) |
| **Broadband** | | | | | |
| Broadband (% premises) | 75 | 4/26 counties | 73 | Dublin (98) | Leitrim (40) |
| National Broadband Plan Dependency (% of premises) | 22 | 23/26 counties | 23 | Leitrim (51) | Dublin (1.6) |
| **Travel** | | | | | |
| State airport travel time (minutes) | 50 (DUB) | 11 | 71 | Fingal (7) | Donegal (165) |
| Regional airport travel time (minutes) | 120 (WAT) | 124 | 86 | Waterford (17) | Monaghan (160) |
| Tier 1 or 2 port travel time (minutes) | 53 (D) | 14 | 67 | Dublin City/ Waterford (14) | Donegal (175) |
| Road Quality (% road surface rated 7-10) | 74 | 4 | 66.5 | Galway City (87) | Fingal (43) |
| Commuting by private vehicle (%) | 81.6 | 9 | 77.2 | Dublin City (41.4) | Roscommon (93.0) |
| Commute of 30 minutes or less (%) | 44.8 | 29 | 57.0 | Galway City (74.0) | Fingal (43.5) |
| Commute over 60 minutes (%) | 21.7 | 31 | 11.6 | Cork City (3.9) | Wicklow (21.7) |
| **Tourism** | | | | | |
| Overseas € per 10,000 population | 5.13m | 16/26 counties | 10.34m | Galway (22.82m) | Laois (1.65m) |
| Accommodation capacity (hotel beds) | 3,330 | 11/26 counties | 5,500 | Dublin (44,677) | Longford (155) |
| **Enterprise** | | | | | |
| IDA jobs per 10,000 (LF) | 378.5 | 18/26 counties | 1,034.9 | Galway (1,589.6) | Laois (34.9) |
| LEO jobs per 10,000 (LF) | 124.0 | 25/30 LAs | 184.3 | Longford (763.0) | Fingal (72.5) |
| EI jobs per 10,000 (LF) | 690.8 | 21/26 counties | 1,029.5 | Monaghan (2,078.9) | Laois (432.4) |

# Data sources & explanatory text

## Population

| Indicator | Source | Explanatory text |
|---|---|---|
| Population | CSO, Census 2016 | Total number of persons resident. (CSO Ref: EY004) |
| Population density | CSO, Census 2016 | Total population divided by total area in km squared. (CSO Ref: E2013) |
| 10-year population change | CSO, Census 2016 | Population change from Census 2006 to Census 2016. (CSO Ref: EY004) |
| Under 35 | CSO, Census 2016 | Number of persons under 35 as a share of total population. (CSO Ref: EY006) |
| Over 65 | CSO, Census 2016 | Number of persons over 65 as a share of total population. (CSO Ref: EY006) |

## Housing

| Indicator | Source | Explanatory text |
|---|---|---|
| Housing stock | CSO, SAPMAP | Total number of permanent dwellings. Sourced from CSO Small Area Population interactive map |
| Housing density | CSO, SAPMAP | Housing stock divided by total area in km squared. Sourced from CSO Small Area Population interactive map |
| Average household size | CSO, Census 2016 | Average Number of Persons per Private Household. (CSO Ref: EY008) |
| Mean house price | CSO, Census 2016 | 2017 average of mean monthly sale prices. (CSO Ref: HPM02) |
| Average rent per month | Residential Tenancies Board (via CSO) | 12 month average of monthly rent in 2017. (CSO Ref: RIA02) |

## Skills

| Indicator | Source | Explanatory text |
|---|---|---|
| Participation rate | CSO, Census 2016 | Share of the population aged 15-64 in the labour force. (CSO Ref: EB001) |
| Gender diversity | CSO, Census 2016 | Female share of the labour force. (CSO Ref: EB001) |
| Third level graduates | CSO, Census 2016 | Share of the labour force who hold Level 7 or higher qualifications. (CSO Ref: EB001) |
| Concentration of STEM-grads | CSO, Census 2016 | Share of the labour force employed in Science, Maths and Computing. (CSO Ref: EB018) |

## Broadband

| Indicator | Source | Explanatory text |
|---|---|---|
| Broadband (% premises) | National Broadband Plan County Statistics, May 2018. | Share of premises with access to high-speed broadband. |
| National Broadband Plan Dependency (% of premises) | National Broadband Plan County Statistics, May 2018. | Share of premises dependent on the National Broadband Plan to provide access to high-speed broadband. |

## Travel

| Indicator | Source | Explanatory text |
|---|---|---|
| State airport travel time (minutes) | Google Maps driving time to the nearest state airport. | Taken from the largest population centre in the local authority at 6am on a Monday morning to Cork (ORK), Dublin (DUB), or Shannon (SNN). |
| Regional airport travel time (minutes) | Google Maps driving time to the nearest regional airport. | Taken from the largest population centre in the local authority at 6am on a Monday morning to Donegal (CFN), Ireland West (NOC), Kerry (KIR), Sligo (SXL), or Waterford (WAT). |
| Tier 1 or 2 port travel time (minutes) | Google Maps driving time to the nearest tier 1 or tier 2 port. | Taken from the largest population centre in the local authority at 6am on a Monday morning to Dublin Port (D), the Port of Cork (C), Shannon Foynes Port (SF), Port of Waterford (W), or Rosslare Europort (RE). |
| Road Quality (% road surface rated 7-10) | Performance Indicators in Local Authorities 2016, National Oversight and Audit Commission (January 2018) | Percentage of regional and primary roads rated between 7 and 10 according to the Pavement Surface Condition Index (PSCI): 7-8 (surface defects) and 9-10 (no defects or less than 10% defective). |
| Commuting by private vehicle (%) | CSO, Census 2016 | Resident population commuting to/from work, college or school by private vehicle. (CSO Ref: E6023) |
| Commute of 30 minutes or less (%) | CSO, Census 2016 | Share of daily commutes lasting 30 mins or less. (CSO Ref: E6023) |
| Commute over 60 minutes (%) | CSO, Census 2016 | Share of daily commutes lasting 60 mins or more. (CSO Ref: E6023) |

## Tourism

| Indicator | Source | Explanatory text |
|---|---|---|
| Overseas € per 10,000 population | Regional tourism performance in 2017, Fáilte Ireland, 2018. | Euro spent by overseas tourists per 10,000 population. |
| Accommodation capacity (hotel beds) | Accommodation Capacity in Ireland 2018. Fáilte Ireland, 2018. | Accommodation capacity measured in the number of available hotel beds. |

## Local enterprise development

| Indicator | Source | Explanatory text |
|---|---|---|
| IDA jobs per 10,000 (LF) | Written question to the Minister for Business, Enterprise and Innovation. Question reference 19553/18, 3 May 2018 | Total jobs in IDA-supported per 10,000 people in the local labour force. |
| LEO jobs per 10,000 (LF) | Impact Report 2017. Local Enterprise Office, 2018. | Total jobs in LEO-supported per 10,000 people in the local labour force. |
| EI jobs per 10,000 (LF) | Written question to the Minister for Business, Enterprise and Innovation. Question reference 14608/18, 29 March 2018. | Total jobs in EI-supported per 10,000 people in the local labour force. |

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