

1

Introduction

The Northern and Western Regional Assembly welcomes the opportunity to provide input into the development of the Department of Agriculture, Food and the Marine (DAFM) new statement of strategy to cover the period 2023 to 2026.

Supporting the development of the Agriculture, Forestry and Marine sector is of particular importance to the Northern and Western Regional Assembly, given that the Northern and Western Region is defined by its unique connection to rural areas, with many parts of the region actively involved in the sector. Notably, the Agriculture, Forestry and Marine sector represents one of the largest indigenous industries in the Northern and Western Region, employing just under 30,000 people in the region, generating just over €2 billion in economic output to the region's economy while also acting as a major source of international trade for the region's export base.¹ As an export-orientated industry — and one that is primarily based within our rural communities — the Agriculture, Forestry and Marine sector will continue to play an essential role in growing the Northern and Western Region's economy in the future.

That said, the sector faces a number of strategic challenges in the coming years, with the reduction of Agriculture's Greenhouse Gas (GHG) emissions by 25 per cent by 2030 regarded as the most pressing and important challenge. Reducing GHG emissions from the Agriculture sector without compromising its capacity for sustainable food production will require a new approach from the DAFM, therefore the new statement of strategy is quite timely and will allow for the development of priorities to overcome these challenges and allow the sector to become more sustainable and competitive.

Data outlined in Section 2 of this submission



With this in mind, the Northern and Western Regional Assembly has made a number of high-level recommendations which should be reflected in the finalised strategy, namely:

- Ensure the new CAP funding schemes are delivered in a manner that supports the primary incomes of family farms located in the Northern and Western Region.
- 2. Encourage a greater uptake of Agri-Environmental Schemes in the Northern and Western Region.
- Incentivise farmers and food producers to embrace more sustainable methods of production.
- Consult farming communities on future policy developments related to the Agriculture sector.
- 5. Develop Ag-Innovation clusters in the Northern and Western Region.
- Use Co-Operatives to support the creation of appropriately scaled Biorefineries and Anaerobic digestion facilities across the Northern and Western Region.
- Assist Higher Education Institutes and research centres in developing courses and undertaking research projects related to the Agriculture, Forestry and Marine sector.

- **8.** Improve the funding opportunities available to famers and food producers that wish to become more involved in the Irish Bioeconomy.
- Explore the possibility of how the tax arrangements of participants in the Irish Bioeconomy can be made more financially attractive.
- 10. Support the coastal communities and marine infrastructure assets of the Northern and Western Region, with a particular emphasis on supporting the region's seafood sector, developing "Smart Ports" and facilitating appropriate offshore wind energy projects.
- 11. Deliver sustainable rates of afforestation in the Northern and Western Region and ensure afforestation is appropriately located and equally distributed across the 3 NUTS 2 Regions of Ireland.
- Adopt regional performance metrics in monitoring the implementation of the new statement of strategy.



2:

Regional Agriculture Profile

Key messages

- Northern and Western Region notably reliant on the Agriculture, Forestry and Marine sector.
- Sector accounts for nearly 1 in 10 jobs in the Border Region in Q4-2022.
- Agriculture generated €2.19 billion in output to the Northern and Western Region's economy.

Relative to the national norm, the Northern and Western Region's employment base is notably reliant on the Agriculture, Forestry and Marine sector. According to the Q4-2022 Labour Force Survey,² the number of people employed in the Agriculture, Forestry and Marine sector in the Northern and Western Region amounted to 29,100 in Q4-2022, representing 6.6 per cent of the region's employment base. This was 2.7 percentage points above the State average and higher than the corresponding ratios for the Southern Region (6.3% of employment base credited to Agriculture, Forestry and Marine sector) and the Eastern and Midland Region (1.4%), as evident from Figure 1.

On a sub-regional level, it is clear that the Agriculture, Forestry and Marine sector is also notably important to the Border and the West. As of Q4-2022, the number of people employed in the Agriculture, Forestry and Marine sector in the Border amounted to 16,100, with the sector also employing 13,000 people in the West. Of the 8 NUTS 3 Regions, the Border was the most reliant on the Agriculture, Forestry and Marine sector, with the sector accounting for 8 per cent of the region's employment base. The corresponding ratio for the West was 5.4 per cent which was also above the State average of 3.9 per cent, as evident from Figure 2.

The Agriculture, Forestry and Marine sector also makes a significant contribution to the economy of the Northern and Western Region. As of 2021, the Agriculture, Forestry and Marine sector contributed to €2.19 billion in output to the Northern and Western Region's economy, with €1.24 as a result of activity in the Border Region and €946 million as a result of activity in the West Region.

According to the CSO's "Regional Accounts for Agriculture", the Border Region had the highest dependency on Pigs and Poultry, which each accounted for 11 per cent of the value of the region's Agricultural Output. Of the 8 NUTS 3 Regions, the Border had the second largest dependency on Livestock, which generated 55 per cent of the region's output. Notably, the Border Region accounted for 71 per cent of Ireland's poultry sector, 25 per cent of output from Ireland's sheep sector and 25 per cent of output from Ireland's pig sector. It was also one of the smaller Milk and Crop producing areas, producing just 7 per cent and 9 per cent respectively of these items. Of the 8 NUTS 3 Regions, the West was the most reliant on the Sheep industry in 2021, contributing to 28 per cent of output associated with Ireland's sheep sector. It had the highest dependency on Livestock, with the sector accounting for 56 per cent of the region's Agricultural output. The West only accounted for 4 per cent of milk output in Ireland and 1 per cent of the cereals.

The Agriculture, Forestry and Marine sector also makes a significant contribution to the Gross Value Added (GVA) ⁵ of the Northern and Western Region. In 2021, the Northern and Western Region's Agriculture, Forestry and Marine sector generated €677 million in GVA, contributing to 2.5 per cent of the region's GVA. As evident from Figure 5, this ratio was higher than the corresponding ratio for Ireland (1%) and was the highest out of the three NUTS 2 Regions in Ireland.

https://data.cso.ie/table/QLF07

https://www.cso.ie/en/releasesandpublications/ep/p-raa/regionalaccountsforagriculture2021/

⁴ At basic prices

⁵ Represents the value of labour and capital used in producing gross output.

Figure 1: Employment in the Agriculture, Forestry and Marine Sector as a percentage of total employment, by the NUTS 2 Regions of Ireland, Q4-2022

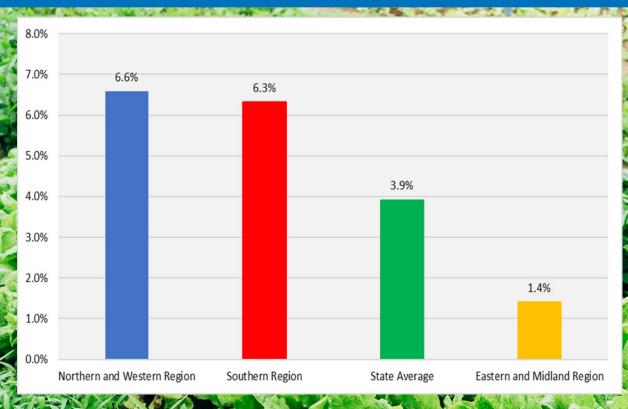


Figure 2: Employment in the Agriculture, Forestry and Marine sector as a percentage of total employment, by the NUTS 3 Regions of Ireland, Q4-2022

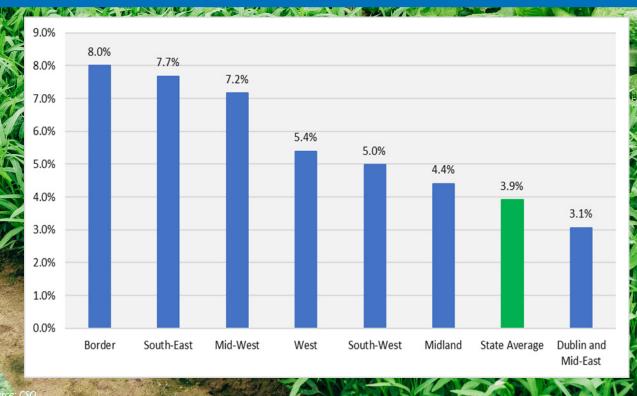


Figure 3: Sub-sectoral composition of Agricultural output in the Border Region, 2021

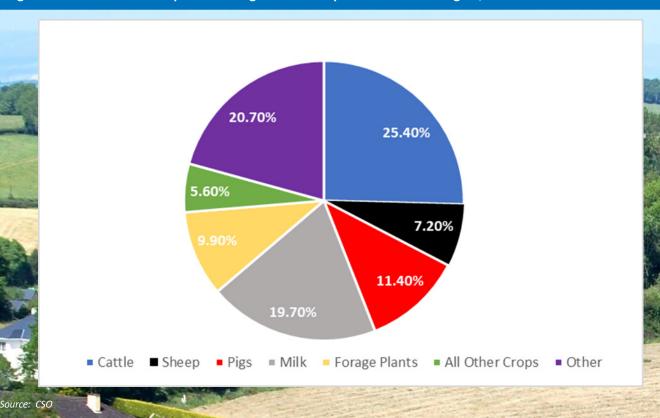


Figure 4: Sub-sectoral composition of Agricultural output in the West Region, 2021

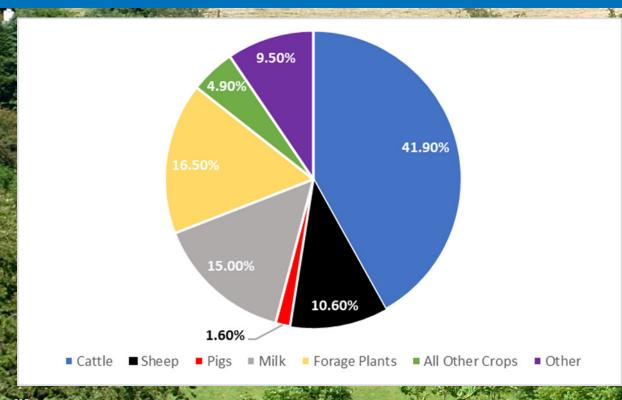


Figure 5: GVA from the Agriculture, Forestry and Marine sector, as a percentage of total GVA, by the NUTS 2 Regions of Ireland, 2021

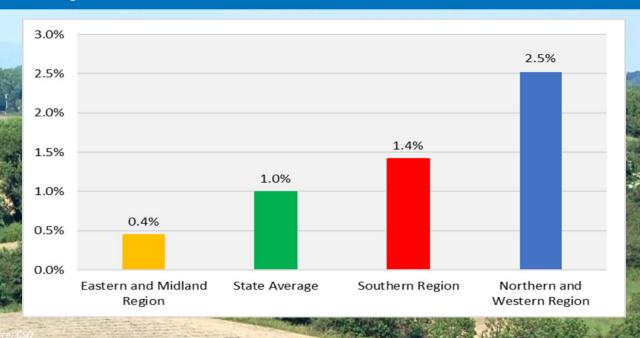
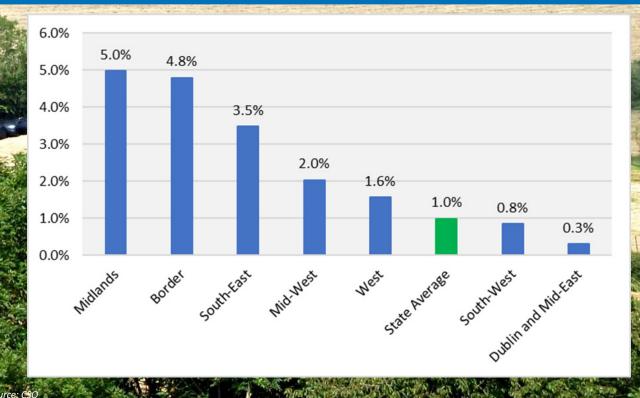


Figure 6: GVA from the Agriculture, Forestry and Marine sector, as a percentage of total GVA, by the NUTS 3 Regions of Ireland, 2021



The forestry sector is also of significant importance to the Northern and Western Region. As of 2021, the Northern and Western Region accounted for 42 per cent of the total level afforestation in Ireland,⁶ with the majority of the counties in the region recording an above average level of forest cover. Furthermore, the Assembly's submission on the National Smart Specialisation Strategy ⁷ also found that the Northern and Western Region had strong specialisms in sub-sectors such as the manufacture of wood and wood products, forestry and logging, highlighting the importance of the sector to the region's employment and skills base.

Figure 7: Total afforestation by the NUTS 2 Regions of Ireland (Hectares), 2021



https://www.nwra.ie/news/submission-on-irelands-next-smart-specialisation-strategy/

Figure 8: County breakdown of afforestation in the Northern and Western Region, (Hectares) 2021 11% 19% 23% 17% 2% 14% ■ Cavan ■ Donegal ■ Galway ■ Leitrim ■ Mayo ■ Monaghan ■ Roscommon ■ Sligo Source: CSO

Recommendations

Based on the evidence base outlined in Section 2 of this submission, it is clear that the Agriculture, Forestry and Marine sector is of significant importance to the Northern and Western Region's economy. Therefore, the development of a new statement of strategy from the DAFM provides an opportunity to identify new priorities in supporting and growing the region's Agriculture, Forestry and Marine sector while improving the economic performance of the Northern and Western Region's economy. On this basis, the Northern and Western Regional Assembly has made a number of high-level recommendations which should be reflected in the finalised text of the statement of strategy, namely:

- 1. nsure the new CAP funding schemes are delivered in a manner that supports the primary incomes of family farms located in the Northern and Western Region: Considering the importance of the Agricultural sector to the region's economy as highlighted in Section 2 of this submission and given the scale of the regional economic challenges being experienced by the Northern and Western Region,⁸ it is imperative that funding allocations under Pillar 1 of the CAP are distributed in a manner which will support the primary incomes of family farms based in our region. This could not be more important given that family farms located in the Border and the West were the most reliant on direct payments as a share of total income, as per the latest data. According to the Teagasc National Farm Survey 2021,⁹ direct payments accounted for 90 per cent of family farm income in the Border, followed closely by the West where the corresponding ratio was 89 per cent, highlighting the importance of ensuring that the new CAP funding schemes are delivered in an equitable and effective manner across the region.
- 2. Encourage a greater uptake of Agri-Environmental Schemes in the Northern and Western Region: The implementation of Pillar 2 of the CAP should aim to encourage a greater uptake of Agri-Environmental Schemes in the Northern and Western Region, with the view of providing supplementary incomes to farmers in the region and supporting the region's transition to a low carbon society. In this regard, funding allocations under Pillar 2 of the CAP should support more environmentally sustainable supplementary activities including but not limited to renewable energy production, environmental services, afforestation, agri-tourism, organics and other environmentally sustainable practises.
- 3. Incentivise farmers and food producers to embrace more sustainable methods of production: Under the Climate Action Plan, Ireland has committed to reducing GHG emissions in the Agriculture sector by 25 per cent by 2030,¹⁰ with the delivery of this target considered central to achieving a 51 per cent reduction in Ireland's overall GHG emissions. If the Agricultural sector is to deliver these targets, it is clear that farmers and food producers will need to be provided considerable financial incentives to embrace more sustainable methods of production, such as the measures outlined under the Teagasc Mitigation Abatement Cost Curve (MACC)¹¹ and through the Signpost Programme.¹² Notably, the Teagasc MACC provides farmers with an established approach to reducing emissions in farms, and the provision of financial incentives in this regard will be key to ensuring the sector adopts more sustainable methods of production as opposed to continuing to use environmentally damaging practices. The

https://www.nwra.ie/wp-content/uploads/2022/09/northern-and-western-regional-assembly-pre-budget-2023-submission97.pdf

https://www.teagasc.ie/media/website/publications/2022/Teagasc-National-Farm-Survey-2021.pdf

https://www.gov.ie/en/press-release/40b39-pathway-to-51-reduction-in-economy-wide-emissions-agreed-mcconalogue-confirms-25-reduction-in-agricultural-emissions/

¹¹ https://www.teagasc.ie/about/research--innovation/teagasc-research-insights-webinars/new-macc-outlook-to-2030/

¹² https://www.teagasc.ie/environment/climate-change--air-quality/signpost-programme/signpost-explained-/

provision of such incentives could not be more important considering the latest data from the EPA shows that emissions from the Agricultural sector rose by 3 per cent in 2021, with the sector now accounting for 37.5 per cent of Ireland's total GHG emissions.¹³

- 4. Consult farming communities on future policy developments related to the Agriculture sector: The new statement of strategy of the DAFM needs to adopt a bottom-up approach in developing policy, providing farmers more opportunities to provide input into the strategic direction of the Agriculture sector. To achieve this, the DAFM should establish regular regional policy forums which would provide a platform for policymakers to engage with and consult farmers on any proposed changes which will significantly affect the Irish Agriculture sector, particularly regarding the implementation of the sector's emission reduction targets as per the Climate Action Plan. Failure to do so could undermine policy efforts to support the sector's transition to more sustainable production patterns and reduce Ireland's overall GHG emissions.
- 5. Develop Ag-Innovation clusters in the Northern and Western Region: The continued development of the region's clusters in terms of Agriculture, Forestry and Marine activities will assist in improving the performance of the Northern and Western Region's economy. The development of these types of clusters will grow family farm incomes, allow for knowledge spill over and innovation diffusion and will encourage the uptake of more advanced technologies and best practices on family farms. In doing so, the DAFM will support the implementation of "Regional Policy Objective" (RPO) 4.26 of the RSES.

The extent to which government bodies can dedicate the emergence of high valued clusters remains to be seen, but nevertheless the DAFM should try to strengthen collaboration and clustering activities between actors within the region's Agriculture, Forestry and Marine sector, while encouraging greater partnerships with the Northern and Western Region's Higher Education Institutions and research centres. Such actions will increase the potential performance of Ag-Innovation clusters within the region, while also increasing the possibility of new clusters being developed.

6. Use Co-Operatives to support the creation of appropriately scaled Biorefineries and Anaerobic digestion facilities across the Northern and Western Region: Considering the potential environmental and economic benefits associated with Biorefineries and Anaerobic Digestion facilities, the new statement of strategy of the DAFM needs to support their rollout across the Northern and Western Region.

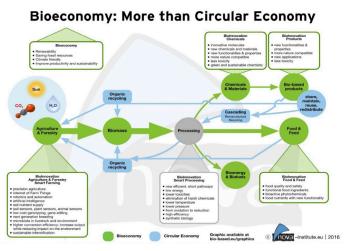
The potential of these facilities is evident from BioMarine Ingredients in Monaghan, which established Ireland's first pilot scale biorefinery plant and highlights how these facilities can support the development of more sustainable production processes and generate employment in the region. By supporting the creation of appropriately scaled Biorefineries, the DAFM will support the implementation of RPOs 4.28 and 4.29 of the RSES.

Furthermore, Anaerobic digestion facilities – which is a natural biological process which converts animal slurries and other wet organic residues to biogas – has been used widely to treat a variety of wastes in countries such as France and Denmark.¹⁴ The rollout of Anaerobic digestion facilities across Ireland has the potential to generate supplementary income to family farms – through biogas and energy production – support more circular based business models and reduce GHG emissions associated within the Agriculture sector. The co-operative model offers a potential route to supporting the rollout of these activities across the region and such potential needs to be acknowledged and supported in the new statement of strategy of the DAFM.

- https://www.epa.ie/our-services/monitoring--assessment/climate-change/ghg/agriculture/
- 14 https://www.ucc.ie/en/eri/news/could-anaerobic-digestion-reduce-emissions-and-natural-gas-use.html

- 7. Assist Higher Education Institutes and research centres in developing courses and undertaking research projects related to the Agriculture, Forestry and Marine sector. Supporting research and innovation will be key to supporting the viability and sustainability of the Agriculture, Forestry and Marine sector in the Northern and Western Region. Therefore, the new statement of strategy of the DAFM should support the research and development capabilities of the Northern and Western Region, as the region has an array of relevant research and industrial specialisms, natural assets and resources suitable to supporting new courses and research projects in the Agriculture, Forestry and Marine sector. Specifically, the statement of strategy should outline actions which will support courses and research projects based in the following institutions and research assets:
 - University of Galway
 - Atlantic Technological University
 - St Angela's Food Technology Centre
 - BioConnect Innovation Centre
 - Teagasc Colleges
 - BIA Innovator Campus
 - Marine and Freshwater Discovery Centre
 - Nua na Mara, Marine Innovation Development Centre
 - Marine Institute
 - Ryan Institute
 - The Atlantic Marine Energy Test Sites
- 8. Improve the funding opportunities available to famers and food producers that wish to become more involved in the Irish Bioeconomy: The development of the Irish Bioeconomy has the potential to collectively support family farm incomes in our region, support the delivery of effective regional development, develop more sustainable industrial practises and support our region's transition to a low carbon society. That said, one of the key development challenges facing the Irish Bioeconomy is that it has less start-up capital funding opportunities in comparison to other developed economies.¹⁵ On this basis, the new statement of strategy of the DAFM should aim to develop actions which aims to overcome this challenge.

In order to scale up the Irish Bioeconomy, the DAFM – in collaboration with the Department of Enterprise, Trade and Employment – should provide additional funding streams for farmers or food producers that are or intend to be involved in the production of biobased products or processes, thereby supporting the development of potential or existing suppliers in the sector. In conjunction to this, the public procurement process could be used in stimulating demand for bio-based products and processes, ensuring the Irish Bioeconomy becomes more economically viable for potential suppliers and thereby making these firms more likely to obtain financial capital from commercial banks and credit unions.



9. Explore the possibility of how the tax arrangements of participants in the Irish Bioeconomy can be made more financially attractive: It has been noted by the Irish Bioeconomy Foundation ¹⁶ that the current taxation arrangements make circular business models less attractive for firms compared to traditional linear based business models. On this basis, the DAFM – in consultation with the Department of Finance – should examine how the tax arrangements of bio-based suppliers can be made more financially attractive relative to suppliers with a linear based business model, while greater efforts should be made to encourage potential bio-based suppliers and stakeholders to apply for funding streams that are available at a EU level.

https://bioeconomyfoundation.com/wp-content/uploads/2021/03/Circular-Bioeconomy.pdf

https://bioeconomyfoundation.com/



10. Support the coastal communities and marine infrastructure assets of the Northern and Western Region, with a particular emphasis on supporting the region's seafood sector, developing "Smart Ports" and facilitating appropriate offshore wind energy projects: The new statement of strategy of the DAFM should continue to support coastal communities across the Northern and Western Region by enhancing the pier infrastructure and marine services of these areas, with the view of supporting the region's robust marine economy and overcoming challenges associated with Brexit.

In this regard, the new statement of strategy should aim to support the region's seafood sector, given the importance of the sector to our remote coastal and island communities. Our region's seafood sector would generate a significant level of economic activity and employment across a range of services, including fish farms, processing operations and distribution. BIM in their role has continued to oversee steady growth in the seafood area and in addition to the ongoing coastal operations there are several strategic sites which are likely to witness further development. With this in mind, the new statement of strategy should support the development and expansion of a number of strategic Marine Resource Innovation Parks across the Northern and Western Region, including locations at Greencastle, Killybegs, Co. Donegal and Cill Chiaran, Co. Galway, (Pairc na Mara), thereby supporting the implementation of RPO 4.34 of the RSES. In doing so, the new statement of strategy can support the growth of aquaculture and seafood services in our region.

Ensuring our harbours and ports are equipped with the latest digital technologies will be considerably important for the region's marine economy. Therefore, the statement of strategy should highlight the need to support the development and uptake of data driven technologies, sensors and other technologies in our region's ports and harbours, thereby supporting their transition towards "Smart Ports" and implementing RPO 6.4 of the RSES of the Northern and Western Region.

Furthermore, the statement of strategy should also aim to support the region's key marine infrastructure assets, with the view of pursuing designation of both Galway Port and Killybegs Harbour as EU TEN-T Comprehensive Ports. Currently, none of the ports in the Northern and Western Region are designated as TEN-T Ports, but the RSES supports the further examination of the feasibility for pursuing designation of both Galway Port and Killybegs Harbour as EU TEN-T Comprehensive Ports. Support in this regard should be reflected in the new statement of strategy of the DAFM. Furthermore, the new statement of strategy should acknowledge the following strengths and opportunities of our region's marine infrastructure assets, particularly their potential regarding offshore wind energy projects:

- Galway Port, Co Galway: The upgrade of Galway Harbour and Port continues to represent a key strategic priority for the Northern and Western Region. Such a project will allow the facility to serve as a commercial port for cargo and also a destination point for cruise tourism. This upscaling of the facility would increase Galway Port's influence across the wider region in terms of recreation and delivery of additional visitors into Galway City and beyond. Furthermore, research from the Carbon Trust ¹⁷ shows that Galway Port without any significant investment is currently capable of meeting the operational and maintenance needs of offshore wind energy projects, while the research notes that the port is capable of staging and manufacturing activities provided significant investment and a change in strategic direction is undertaken to meet the requirements of the sector. With this in mind, it is clear that Galway Port has considerable potential in supporting the future growth of the offshore wind energy sector in Ireland, and with greater investment in Galway Port as per the RSES additional opportunities can be delivered for the region. The DAFM should acknowledge the potential of Galway Port in this regard while supporting its designation as a EU TEN-T Comprehensive Port.
- Willybegs, Co Donegal: Acting as Ireland's primary fishing port and deep-water facility, Killybegs services other commercial activity associated with the oil and gas industry, the tourism industry and the on-shore renewable energy industry. A significant marine cluster exists in Killybegs, which serves the North Atlantic Pelagic fleet, and boasts marine engineering expertise, boatbuilding and a further expansion of these activities should be supported in the new statement of strategy. Furthermore, research from the Carbon Trust¹⁸ shows that Killybegs is strongly positioned to meet the demands of a growing offshore wind energy sector, based on the harbour's physical characteristics, strategic location, existing marine engineering experience and availability of land around the harbour. The redevelopment of other lands around the harbour has also the potential for it to become an offshore wind cluster. Therefore, the new statement of strategy of the DAFM should outline its support for the future development of Killybegs Harbour and the need to pursue its designation as a EU TEN-T Comprehensive Port.
- Ross a Mhil, Co Galway: Ros an Mhíl's strategic location, its port depth, the approach channel depth, and the lack of land availability means this port cannot currently serve the offshore wind growth beyond operational and maintenance services, as per research carried out by the Carbon Trust. Nevertheless, given the strategic location of Ros an Mhíl, it is clear that the port could act as an important operational and maintenance base for offshore wind energy projects along the west coast of Ireland, depending on the level of investment provided to support the port's infrastructure. Such potential is evident from a report from Údarás na Gaeltachta which noted that Ros an Mhíl is currently well positioned to act as a operational and maintenance port to wind farms from Loop Head to Belmullet, ¹⁹ with the report noting that the offshore wind energy sector has notable potential in supporting GVA and employment in Galway and the wider region. On this basis, the Northern and Western Regional Assembly contend that the port of Ros an Mhíl can make a significant contribution in supporting the future development of Ireland's offshore wind energy sector and such potential should be reflected in the new statement of strategy of the DAFM.
- Other Ports: Other ports in the Northern and Western Region such as Greencastle, Sligo Port and a number of other small scale ports may offer more limited opportunities to support the offshore wind energy sector. These locations could benefit from appropriate feasibility studies and infrastructure upgrades to enable them to offer support to offshore wind energy projects.
- https://windenergyireland.com/images/files/final-harnessing-our-potential-report-may-2020.pdf
- https://windenergyireland.com/images/files/final-harnessing-our-potential-report-may-2020.pdf
- https://udaras.ie/assets/uploads/2021/10/Ros-a-Mhil-A-Strategic-Hub-Executive-Summary.pdf

- 11. Deliver sustainable rates of afforestation in the Northern and Western Region and ensure afforestation is appropriately located and equally distributed across the 3 NUTS 2 Regions of Ireland: Afforestation will be a key component in supporting the implementation of the emission reduction targets outlined in the Climate Action Plan, with the sector also instrumental to supporting biodiversity stocks, rural economic development and recreational activities.
 - This sector is of particular importance to the Northern and Western Region, with the region accounting for 42 per cent of the total level afforestation in Ireland as of 2021,²⁰ with the majority of the counties in the region recording an above average level of forest cover. Within this context, the new statement of strategy of the DAFM should acknowledge the importance of delivering sustainable rates of afforestation in the Northern and Western Region, taking into account the existing landscape characteristics and forest cover of the region and acknowledging the potential impact of new afforestation on the region's infrastructure, communities and biodiversity stocks. This will ensure a plan-lead and spatial approach is developed in the rollout of future afforestation programmes, ensuring new planting is equally delivered across the 3 NUTS 2 Regions of Ireland.
- 12. Adopt regional performance metrics in monitoring the implementation of the new statement of strategy: In evaluating the implementation of the new statement of strategy, the DAFM where possible should monitor the following regional performance metrics, namely:
 - Direct employment in the Agriculture, Forestry and Marine sector, for each of the NUTS 2 Regions and NUTS
 3 Regions of Ireland.
 - Total economic output generated in the Agriculture, Forestry and Marine sector, for each of the NUTS 2 Regions and NUTS 3 Regions of Ireland.
 - GVA generated in the Agriculture, Forestry and Marine sector, for each of the NUTS 2 Regions and NUTS 3 Regions of Ireland.
 - Value, volume and composition of exports in the Agriculture, Forestry and Marine sector, for each of the NUTS
 2 Regions and NUTS 3 Regions of Ireland.
 - Number of active family farms in each of the NUTS 2 Regions and NUTS 3 Regions of Ireland.
 - Geographical distribution of funding provided under the DAFM funding schemes, by the NUTS 2 and NUTS 3 Regions of Ireland.
 - Emissions generated from the Agriculture sector, on a national and NUTS 2 Regional level.
 - The total level of afforestation in each NUTS 2 Region, NUTS 3 Region and each county in Ireland.





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