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An Tuaiscirt & An Iarthair
Northern & Western
Regional Assembly

Regional Infrastructural Tracker

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Executive Summary

1

Whether it be the presence of a high-quality road network, the provision of connected and accessible rail infrastructure, the availability of broadband, or investment in higher education institutes and research facilities it is clear that infrastructure – or the lack of – is a major contributing factor to explaining the development patterns of our regions in Ireland. At a high-level, infrastructure facilitates the efficient movement of goods, services and people, generates agglomeration benefits – such as economies of scale, productivity gains and knowledge diffusion – supports population, employment and investment growth, while serving the most fundamental needs of society, whether it be in health, education or the environment.

Despite this, the Northern and Western Region of Ireland has been historically underserved in the provision of high quality infrastructure, both in traditional forms of infrastructure – such as roads, rail or ports – or more modern forms of infrastructure such as broadband and research facilities. Such underinvestment has occurred even at a time of exceptional growth in the Irish economy and an abundance of exchequer returns,¹ with the scale of underinvestment in the Northern and Western Region of Ireland notably stark and plain to see across the region.

It is important to recognise the connectivity issues which have historically disadvantaged the Northern and Western Region of Ireland were specifically acknowledged at the outset of the National Planning Framework (NPF) in 2018 and the Regional Spatial and Economic Strategy (RSES) in 2020. Throughout the NPF, there are references that advocate for the need to improve links between the Northern and Western Region of Ireland and Dublin, and indeed the rest of the country. In Chapter 2 of the NPF, National Policy Objective 2c seeks to address this gap, with an ambition to significantly improve accessibility to the North-West of Ireland. Section 3.3 of the NPF outlines the disadvantage of Donegal insofar as it is spatially unique within the island of Ireland and commits to enhanced connectivity as a priority to enable the growth of the region. Regrettably, the projects to enable long standing, generational constraints in infrastructure across Cavan, Monaghan and Donegal (including the A5 Link) have not been expedited, nor are they in the immediate pipeline of NDP projects. The implementation of the NPF and the RSES requires this matter to be addressed urgently.

The scale of these type of infrastructure deficits are evident across the region, with the motorway network extending east from Dublin to Galway City and only as far north as Tuam. The main national road network beyond Galway – including the N17 Tuam to Collooney, N2 / A5 Ardee to the Border and Aughnacloy to Strabane, N13 Sligo to Bundoran, N14 Manorcunningham to Lifford and N4 Carrick on Shannon to Dromod – act as critical inter-urban arteries within the region. They serve areas where other modal alternatives – such as rail – either do not exist or would benefit from significant upgrading in quality, speed and frequency. These inter-urban road arteries act as lifelines but their alignment and carrying capacity is substandard with above average collision rates.² Remarkably, counties such as Donegal, Cavan and Monaghan have no access to rail services, with key urban centres – such as Galway City, Sligo Town and Letterkenny – not directly connected to each other via the rail network. Beyond transport issues, there is also considerable challenges in other sections of the region’s infrastructure network. Notably – with the exception of Galway City – there is no other Science Foundation Ireland (SFI) research centres located in the Northern and Western Region of Ireland. The region has no Port designated as a Tier 1 Port, the region’s electrical grid experiences significant risks in overloading, while higher education infrastructure and services are particularly underinvested in the Border counties.

¹ <https://www.gov.ie/en/press-release/cb77b-exchequer-surplus-of-12-billion-in-2023-tax-revenue-in-line-with-expectations-ministers-mcgrath-donohoe/>

² TII Major Active Road Projects 2023

This legacy of underinvestment is having far-reaching consequences on the Northern and Western Region of Ireland, with the resultant infrastructure deficits restricting the development of the region’s economy, affecting the delivery of public services, while undermining efforts to implement important targets outlined in the National Planning Framework (NPF),³ the Regional Spatial and Economic Strategy (RSES)⁴ of the Northern and Western Region and the Climate Action Plan.⁵ The RSES – which acts as the regional implementation of the NPF in the Northern and Western Region of Ireland – is a statutory investment framework which aims to accommodate future population and employment growth in a manner which allows the region to provide a credible counterbalance to the growth trajectory of the Greater Dublin Area. Within this context, the Northern and Western Regional Assembly has developed the “**Regional Infrastructure Tracker**”, which seeks to:

1. Analyse the scale of investment in infrastructure projects of scale across the Northern and Western Region of Ireland between 2016 – which is the base year of the NPF – and April 2024.
2. Document the scale of infrastructure deficits across the Northern and Western Region of Ireland, using an evidence-based approach.
3. Examine the level of infrastructure projects of scale that are in the pipeline to be delivered in the Northern and Western Region of Ireland as part of the implementation of the National Development Plan (NDP) (2021-2030).⁶
4. Assess whether the “National Strategic Outcomes” and “National Policy Objectives” outlined within the NPF are being progressed in the 6 years since its adoption in 2018.
5. Outline the infrastructure priorities of the Northern and Western Regional Assembly, in advance of the publication of the revised NPF and the future revision of the RSES of the Northern and Western Region of Ireland.

The purpose of the “**Regional Infrastructure Tracker**” is to:

- ◊ Inform national, regional and local stakeholders on the latest developments regarding investment in the infrastructure of the Northern and Western Region of Ireland in advance of the publication of the revised NPF.
- ◊ Support the implementation of the RSES of the Northern and Western Region of Ireland, specifically “Regional Policy Objective” (RPO) 10.3, which states that “The NWRA will publish (and update) an infrastructure tracker and progress report every two years.”

³ <https://www.npf.ie/wp-content/uploads/Project-Ireland-2040-NPF.pdf>

⁴ <https://www.nwra.ie/pdfs/NWRA-RSES-2020-2032.pdf>

⁵ <https://www.gov.ie/en/publication/67104-climate-action-plan/>

⁶ <https://www.gov.ie/en/publication/774e2-national-development-plan-2021-2030/>



Using a wide range of up-to-date data sources from the private firm “Construction Information Services” (CIS), government departments and agencies, the “**Regional Infrastructure Tracker**” has captured the scale of underinvestment in the infrastructure assets of the Northern and Western Region of Ireland. These findings have been outlined in Section 3 of this publication, with the key findings as follows:

Key Findings

- ✦ Only 9.9 per cent of the investment committed under public sector tenders – that were published between 2016 and April 2024 and which were worth more than €1 million – were for infrastructure projects in the Northern and Western Region of Ireland, despite the region accounting for 17.6 per cent of Ireland's population (Census 2022).
- ✦ In contrast, the Eastern and Midland Region of Ireland accounted for 66.5 per cent of the investment committed under these types of public sector tenders, which was notably higher than the region's corresponding share of Ireland's population which was 49.3 per cent.
- ✦ These disparities worsen when only examining public sector tenders worth more than €20 million, which were published between 2016 and April 2024. For example, only 5.7 per cent of the investment committed under these types of public sector tenders were for infrastructure projects in the Northern and Western Region of Ireland. In contrast, the Eastern and Midland Region accounted for just over 75 per cent of investment committed under these types of public sector tenders, despite accounting for 49.3 per cent of Ireland's population.

The focus on projects worth more than €20 million is because they are considered major projects of scale, as per the definition used by the Department of Public Expenditure, NDP Delivery and Reform.⁷ The delivery of major infrastructure projects of scale will be central to enabling regional opportunities, addressing legacy underinvestment in the Northern and Western Region of Ireland and supporting effective regional development in Ireland, thus realising the vision and objectives of the NPF and the RSES. Separately – and using data from government departments and agencies – the Northern and Western Regional Assembly found significant underinvestment in the Northern and Western Region's national, regional and local roads network, higher education institutes, research network and active travel infrastructure, while the region also received relatively low levels of funding in schemes related to urban regeneration. Above average levels of investment were found in the region's port network and sports infrastructure, while the region also received relatively high levels of funding under the Rural Regeneration Development Fund.

Considering these findings, it is unsurprising to see that the Northern and Western Region of Ireland is experiencing significant infrastructure deficits, all of which is leading to rising regional imbalance in Ireland. The “**Regional Infrastructure Tracker**” has captured the consequences of these infrastructure deficits in Section 4 of this publication, with the key findings as follows:

⁷ <https://www.gov.ie/en/collection/f828b-myprojectireland-interactive-map/>

Key Findings

- ✦ **Transport Infrastructure:** Out of the 234 NUTS 2 Regions examined in the European Commission’s “Regional Competitiveness Index”, the Northern and Western Region of Ireland’s transport infrastructure was ranked 218th, implying that the region had the 17th worst transport infrastructure ranking of the NUTS 2 Regions examined in the index. The transport infrastructure index score of the Northern and Western Region of Ireland would be similar to the performance of regions that are categorised by the European Commission as “Less Developed Regions” in countries such as Romania, Bulgaria, Greece, Poland, Hungary and Slovakia. This is despite the exceptional growth of the Irish economy in recent times.

- ✦ **Health Infrastructure:** Most of the hospitals in the Northern and Western Region of Ireland had relatively high levels of Emergency Department (ED) patients that were waiting more than 12 hours to be either admitted to a ward or discharged. In 2022, 51 per cent of ED attendees in Galway University Hospital had to wait more than 12 hours to be either admitted to a ward or discharged, which was notably higher compared to the State average of 38.3 per cent. This was followed by Mayo University Hospital at 43.8 per cent, Sligo University Hospital at 43.4 per cent and Cavan and Monaghan Hospital at 38.8 per cent. Despite recording below average ratios in this regard, 26.9 per cent of ED attendees in Letterkenny University Hospital had to wait more than 12 hours to be either admitted to a ward or discharged, with the corresponding ratio for attendees at Portlinculla University Hospital being 21.5 per cent.

- ✦ **Social Housing Infrastructure:** For each year between 2016 – which represents the base year of the NPF – and 2023, the Northern and Western Region’s share of total social housing output was below its estimated share of Ireland’s population during this period, highlighting the relative lack of provision of social housing on a regional level. The total number of households that were on the waiting list for social housing supports from the Local Authorities of the Northern and Western Region of Ireland amounted to 6,950 in 2023, which was considerably higher compared to the total level of social housing output (1,143 units) in the region in that same year.

- ✦ **Research Infrastructure:** Only 2 SFI Research Centres are located in the Northern and Western Region of Ireland – namely INSIGHTS and CURAM – with both of these research centres located in Galway City. Outside of Galway City, there is currently no SFI research centres located in the Northern and Western Region of Ireland.

- ✦ **Digital Infrastructure:** Of the 8 NUTS 3 Regions of Ireland, households in the Border had the lowest level of access to fixed broadband, with only 79 per cent of households having a fixed broadband connection in 2023, below the State average of 86 per cent. A below average ratio was also recorded in the West at 83 per cent in 2023.

- ✦ **Surface Water and Wastewater Infrastructure:** As per the latest data from Uisce Éireann at the time of writing of this publication, 60.9 per cent of settlements in the Northern and Western Region of Ireland – to some extent – required capital investment to address capacity constraints or to deliver “Level of Service” improvements in meeting their population targets up to 2032. In conjunction to this, 25.2 per cent of the settlements in the Northern and Western Region of Ireland either have no spare treatment capacity or have some potential spare treatment capacity in terms of their wastewater infrastructure, suggesting some form of deficits exist within their wastewater network.

- ✦ **Electrical Grid Infrastructure:** Many of the 110 kV circuits in the north-west area of Northern Ireland see a significant risk of overloading, with such deficits credited to the large increase in onshore wind generation in the area and the lack of capacity to accommodate this increase. Likewise, 110 kV circuits in the upper end of the Northern and Western Region of Ireland – in particular in counties such as Donegal and Sligo – see a high risk of overloading, with such a risk also driven by an increase of onshore wind generation in the area.

Based on the scale of these infrastructure deficits, it is clear that a wide range of “National Strategic Outcomes” (NSO) and “National Policy Objectives” that were outlined in the NPF have not been progressed in the Northern and Western Region of Ireland since its adoption in 2018. Underperformance in this regard is particularly acute regarding “NSO 1: Compact Growth”, “NSO 2: Enhanced Regional Accessibility”, “NSO 3: Strengthened Rural Economies and Communities”, “NSO 5: A Strong Economy supported by skills and innovation”, “NSO 6: High-Quality International Connectivity”, “NSO 8: Transition to a low Carbon and Climate Resilient Society”, “NSO 9: Sustainable Management of Water, Waste and other Environmental Resources” and “NSO 10: Access to Quality Childcare, Education and Health Services”.

As well as contributing to sizeable infrastructure deficits in the Northern and Western Region of Ireland, legacy underinvestment in the region’s infrastructure assets is clearly contributing to rising regional disparities in Ireland, with such deficits undermining the ability of the region to attract high valued jobs, talent and investment compared to other regions in Ireland. This is primarily due to the fact that the provision of high-quality infrastructure is key to generating agglomeration benefits, with the OECD noting that agglomeration benefits is associated with reducing regional disparities⁸ and delivering relatively higher levels of regional economic development within countries.

The scale of these regional imbalances is particularly evident from the Census 2022 results, with the latest data showing that Ireland’s population is becoming more concentrated in the Eastern and Midland Region, with the Northern and Western Region’s share of Ireland’s population progressively falling over the past number of years. For example, the Northern and Western Region accounted for 18.6 per cent of Ireland’s population in 1991 – and despite having recorded population growth since the early 1990s – the region’s share of Ireland’s population has progressively fallen to 17.6 per cent in 2022. During the same time period, the Eastern and Midland Region accounted for 46.6 per cent of Ireland’s population in 1991, with its share of Ireland’s population progressively rising to 49.3 per cent in 2022.

Considering the consequences of underinvestment in the infrastructure of the Northern and Western Region of Ireland, the implementation of the latest National Development Plan (NDP) (2021-2030) could not be more important, with the provision of new infrastructure projects of scale central to addressing these sizeable infrastructure deficits and overcoming rising regional inequalities in Ireland. Despite this – and based on the latest information regarding the implementation of the NDP (2021-2030) – there seems to be a relative lack of infrastructure projects of scale that are currently in the pipeline for the Northern and Western Region of Ireland, as evident from the content presented in Section 5 of this publication. For example, as per the recently updated “MyProjectIreland Tracker”⁹, the Northern and Western Region of Ireland accounts for 13.5 per cent of infrastructure projects of scale that are currently in the pipeline to be delivered in the years beyond 2024,¹⁰ which is below the region’s share of Ireland’s population which was 17.6 per cent in 2022.¹¹ While there are other investment programmes and several other infrastructure projects of scale which are committed to be delivered in the Northern and Western Region of Ireland – as per the text of the NDP (2021-2030) – many of them were originally committed for delivery as far back as the NDP (2000-2006), with the latest updates suggesting that they will not be delivered in the short to medium term.

⁸ <https://www.oecd-ilibrary.org/sites/9789264293137-5-en/index.html?itemId=/content/component/9789264293137-5-en#wrapper>

⁹ <https://www.gov.ie/en/collection/f828b-myprojectireland-interactive-map/>

¹⁰ Excludes projects considered on national scale, which amounts to 19 projects (i.e. National Broadband Scheme).

¹¹ Census 2022: <https://www.cso.ie/en/releasesandpublications/ep/p-cpsr/censusofpopulation2022-summaryresults/keyfindings/>

Taking into account all of these factors, it is clear that a new approach is needed in addressing sizeable regional infrastructure deficits and regional imbalances in Ireland and that the revised NPF and the existing NDP (2021-2030) should adopt a policy of “Positive Discrimination” in order to deliver regional equity towards the Northern and Western Region of Ireland. At a high level, a policy of “Positive Discrimination” would involve adopting a regional approach in the implementation of the revised NPF and the NDP (2021-2030), which would specifically involve undertaking the following 5 steps, namely:

1. **Deliver 13 “Priority Infrastructure Projects” in the Northern and Western Region of the island of Ireland:** As a starting point, the Department of Public Expenditure, NDP Delivery and Reform should begin allocating appropriate levels of funding to prioritise the delivery of infrastructure projects of scale in the Northern and Western Region of the island of Ireland that are already committed to in the existing NDP (2021-2030). In conjunction with this, the Department of Public Expenditure, NDP Delivery and Reform should also support a number of key infrastructure projects of scale in the region, which are not committed for delivery under the NDP (2021-2030).

Such funding should aim to ensure that these projects are prioritised in the implementation of the NDP (2021-2030), ensuring they are efficiently delivered from the appraisal stages of the project to completion. In this regard, a policy of “Positive Discrimination” in the implementation of the NDP (2021-2030) should prioritise the delivery of the following 13 infrastructure projects. It should be noted that these “Priority Projects” have not been ranked in order of priority, with the latest nominal cost estimates on these projects outlined where they are available.

For the 13 “Priority Projects” that have costings available – or where costings are currently possible – it is estimated that delivering these projects would – at minimum – cost between €4.8 billion and €6.8 billion over their appropriate delivery timeframes, with this range taking into account price inflation from the date of the cost estimate in question.¹² It is important to note that these estimates are likely to change depending on further inflation in construction costs, delays associated with planning and appraisal processes, technology developments and other factors associated with the delivery of sizable infrastructure projects. The delivery of these projects represents significant value for money for the State, supporting the delivery of a number of policy frameworks – such as the NPF, the RSES and the Climate Action Plan – addressing sizeable infrastructure deficits across a number of counties while supporting the development of the all-island economy. Notably, the collective cost of their delivery is considerably lower compared to the initial cost estimate for the Dublin Metro¹³ (i.e. €9.5 billion).

¹² Prices adjusted to take into account inflation using the CSO’s Consumer Price Index (CPI)

¹³ <https://www.oireachtas.ie/en/press-centre/press-releases/20230704-committee-of-public-accounts-pac-warns-cost-of-planned-dublin-metrolink-project-must-not-exceed-9-5bn/>



Table 1: Priority infrastructure projects in the Northern and Western Region of the island of Ireland

Infrastructure Project of Scale	Latest cost estimate (m = millions of €) ¹⁴
N2 Clontibret to the Border	€280m to €340m ¹⁵
Donegal TEN-T Projects i.e. <ul style="list-style-type: none"> N15/N13 Ballybofey/Stranorlar Bypass N56/N13 Letterkenny to Manorcunningham N14 Manorcunningham to Lifford/Strabane/A5) 	€785m to €840m ¹⁶
The Atlantic Technological University's Library, IT and Education Building (Letterkenny campus)	€25m to €75m ¹⁷
N6 Galway City Ring Road Scheme	€500m to €1 billion ¹⁸
Western Rail Corridor Phase 2 + 3 (i.e. rail line between Athenry and Claremorris)	€400m to €600m ¹⁹
Western Rail Corridor Phase 4 (i.e. rail line between Claremorris and Collooney)	€412m ²⁰
N17 Knock to Collooney Road Scheme	€600m ²¹
Port of Galway Redevelopment	€50m to €100m ²² (estimated exchequer contribution only)
The Atlantic Technological University's STEM Building (Galway City campus)	€25m to €75m ²³
Dual track lines and electrification of lines between Athlone and Galway City	€800m to €1.3 billion ²⁴
A5 Road Scheme	€600m ²⁵ (i.e. Irish Government's contribution only).
Expansion of Ulster University's Magee campus (Derry City) to 7,500 students.	€0m to €450m (i.e. depending on Irish Government's contribution) ²⁶
Ireland West Airport Knock's (IWAK) prioritisation of investment into critical safety, security, operational and capital infrastructure for the future ongoing maintenance and sustainable development of the Airport up to 2030. ²⁷	€45 m

Source: Northern and Western Regional Assembly

¹⁴ Estimates based on the prices at the time of the publication in question.

¹⁵ https://www.tii.ie/roads-tolling/projects-and-improvements/Major-Active-Projects_MAR2023.pdf

¹⁶ https://www.tii.ie/roads-tolling/projects-and-improvements/Major-Active-Projects_MAR2023.pdf

¹⁷ Based on consultations with the Atlantic Technological University and includes capital costs only

¹⁸ <https://www.gov.ie/en/press-release/7b92d-minister-donohoe-launches-updated-project-ireland-2040-progress-tracker/>

¹⁹ <https://www.gov.ie/en/consultation/4d4f2-all-island-strategic-rail-review-public-consultation-for-strategic-environment-assessment/>

²⁰ Based on report from Dr John Bradley and West-on-Track: <http://www.westontrack.com/bradley-report-wrc24.pdf>

²¹ Costings not available via TII but discussions in the Oireachtas suggests that development of the project would cost around €600 million: <https://www.oireachtas.ie/en/debates/debate/seanad/2023-05-18/8/?highlight%5B0%5D=n17&highlight%5B1%5D=knock&highlight%5B2%5D=collooney&highlight%5B3%5D=600&highlight%5B4%5D=million&highlight%5B5%5D=n17>

²² Does not represent the estimated overall cost of the relocation of the Port, with €50m to €100m range based on the potential use of exchequer resources from funds such as the Urban Regeneration Development Fund. Based on consultations with the Port of Galway.

²³ Based on consultations with the Atlantic Technological University and includes capital costs only

²⁴ <https://www.gov.ie/en/consultation/4d4f2-all-island-strategic-rail-review-public-consultation-for-strategic-environment-assessment/>

²⁵ <https://www.gov.ie/en/press-release/2c23e-unprecedented-funding-of-over-800m-for-shared-island-investment-priorities-including-a5-road/>

²⁶ Official "capital cost" estimates from the Department of Economy shows that increasing the campus size to 7,500 students would cost £385 million (April 2024), but to what degree the Irish government contributes to this remains to be seen at the time of writing. Cost range of £0 to £385 million included to take into account that the Irish Government could contribute no funding to the expansion or – at most – would pay for the entire expansion. Paying for the entire expansion would be highly unlikely but such a range provides some sense of the capital cost of increasing the Ulster University Magee campus size to 7,500 students, assisting the University towards the stated goal of having 10,000 students in the campus as per the "New Decade, New Approach" agreement. Estimate has been converted to euros based on the £/€ exchange rate at the time of the cost estimate using Bank of England data: <https://www.bankofengland.co.uk/statistics/exchange-rates>

²⁷ Assuming investment aid of 90% based on consultations with the senior management of IWAK.

- 2. Increase the level of capital expenditure committed to under the NDP (2021-2030) in order to develop other infrastructure projects of scale in the Northern and Western Region of Ireland:** The Department of Public Expenditure, NDP Delivery and Reform should begin allocating appropriate levels of funding to:
- » Support specific rail projects, relevant reviews and feasibility studies that have been outlined in the RSES of the Northern and Western Region – through a variety of RPOs – and which haven't been noted in recommendation 1 of this publication.
 - » Improve the infrastructure and capacity of the seaports and harbours of the Northern and Western Region of Ireland, with a particular focus on Killybegs and Ros An Mhíl Harbour– so that these ports can capitalise on the opportunities associated with the offshore wind energy sector and the blue economy – as well as ensuring safe access by sea for island communities.
 - » Support the infrastructure and services of Donegal Airport
 - » Deliver transport projects that have been outlined in the existing Galway Transport Strategy and projects that will be outlined in Local Transport Plans in the Northern and Western Region of Ireland.
 - » Provide more safe cycling routes and enhance pedestrian facilities across settlements of all scale in the Northern and Western Region of Ireland.
 - » Enhance the reliability and connectivity of inter-regional and intra-regional bus services that connects the key settlements of the Northern and Western Region of Ireland.
 - » Deliver more “Fast” and “High-Powered” EV charge points at strategic and accessible locations across the Northern and Western Region of Ireland.
 - » Expand the Local Link Rural Transport Programme throughout rural communities in the Northern and Western Region of Ireland.
 - » Improve the inter-regional and intra-regional national road network that connects the key settlements of the Northern and Western Region of Ireland, by delivering the outstanding road projects documented in RPOs 6.6, 6.7 and 6.8 of the RSES – particularly those on the TEN-T comprehensive network – and by maintaining and enhancing the regional and local road network of the region. Specific projects in this regard have been outlined in Appendix A.
 - » Provide a safe, secure and reliable electricity network for the Northern and Western Region of Ireland as it transitions to a low carbon economy.
 - » Invest in the sustainable management of water and other environmental resources of the Northern and Western Region of Ireland.
 - » Invest in building out the gas supply network into the Northern and Western Region of Ireland, particularly where gaps have been identified in counties such as Sligo, Roscommon, Donegal and Leitrim.

Greater details on the priorities outlined under recommendation 2 of the “Regional Infrastructure Tracker” are outlined in Section 6.

- 3. Reform infrastructure appraisals in a manner that reflects the comparative disadvantage of the Northern and Western Region of Ireland, having regard to legacy underinvestment and statutory policy frameworks.** For example, an important element of infrastructure project appraisals is the use of Cost Benefit Analyses (CBAs) in determining the economic viability of a project. Considering the importance of region's populations in calculating the stated benefits of an infrastructure project in any CBA, it is clear that projects based in rural oriented regions – such as the Northern and Western Region of Ireland – are naturally disadvantaged compared to similar projects that would be located in more urban oriented regions, such as the Greater Dublin Area. On this basis, the Department of Public Expenditure, NDP Delivery and Reform should examine how their infrastructure project appraisals could be reformed in manner which takes into account the population size, structure and policy frameworks associated with rural oriented regions such as the Northern and Western Region of Ireland.

4. **Ensure more than half of the European Regional Development Fund (ERDF) is ringfenced for the Northern and Western Region of Ireland, for the next EU funding period (2028-2035):** Given the scale of infrastructure deficits in the region and considering the significant economic challenges being experienced by the Northern and Western Region of Ireland – as evident by the European Commission’s decision to downgrade the region’s economy from a “More Developed Region” to a “Transition Region” – the Assembly believes that future allocations of the ERDF should be predominantly ringfenced towards this region. The allocation of funding has the potential to assist in overcoming the region’s sizable infrastructure deficits and addressing some of its economic challenges.
5. **Examine how a process of regional decentralisation can take place in Ireland, ensuring greater regional autonomy can be implemented in Ireland from a policy perspective:** The provision of greater regional autonomy in Ireland could not be more important given that regional inequalities are rising and considering the associated benefits of greater levels of regional autonomy in developed economies. These benefits include improving citizen participation in the democratic process – by bringing the activities of government closer to its citizens – supporting political stability and placing greater accountability on regional and local policymakers, while also supporting efficiency gains as public services can be regionally tailored to better meet the needs of local communities. Moreover, the OECD have found that greater levels of regional autonomy – in the form of fiscal powers – is positively associated with greater levels of regional economic activity – specifically in terms of GDP, public investments and education outcomes – while revenue decentralisation appears to be even more strongly associated with income gains and smaller regional economic disparities.

In the meantime – and until an initiative such as a Citizens Assembly is established to examine in detail how effective regional government can be delivered – some alternatives could be considered as interim measures, these include:

- » A Minister for “Regional Development”, which includes a government department with a significant budget for delivering key regional priorities.
- » A cross sectoral task force, which is afforded a remit to address the long standing, significant gap in spatial equity across the State, whether it be in health care, educational provision, and transport infrastructure.
- » An initiative combining the Regional Assemblies, Local Authorities, industry leaders, educational and research bodies to create an initiative similar in scope to the Northern Powerhouse in the United Kingdom.

Without a policy of “Positive Discrimination”, the Northern and Western Region of Ireland will never be able to unlock its regional opportunities nor deliver on the vision of effective regional development – as clearly outlined as one of the central tenets of the NPF and the RSES. Additionally, the region will continue to struggle in meaningfully reducing carbon emissions in line with the national targets set out in the Climate Action Plan. Failure to engrain this type of regional approach into the implementation of the revised NPF and the NDP (2021-2030) will inevitably lead to continued overconcentration of activity in the Greater Dublin Area – undermining the quality of life of its residents through factors such as excessive demand on public services, higher housing costs and urban sprawl – while also undermining the potential of more rural oriented regions such as the Northern and Western Region of Ireland.

Overview of Analysis

2

The Northern and Western Regional Assembly plays an important role in advocating for policies and preparing research that will support economic development in the Northern and Western Region of Ireland. Such a role involves providing evidence-based advice and support to other appropriate public bodies of the regional implications of their policies and plans, with the Assembly's specific focus on leading best practice in spatial planning and economic development in the Northern and Western Region of Ireland.

Amongst its responsibilities, the Northern and Western Regional Assembly has a statutory role in the development, monitoring, and implementation of the Regional Spatial and Economic Strategy (RSES) of the Northern and Western Region of Ireland²⁸. The RSES is a statutory investment framework which acts as the regional implementation of the National Planning Framework (NPF)²⁹ in the Northern and Western Region of Ireland, aiming to support population and employment growth in a manner that will benefit its communities and allow the region to provide a credible counterbalance to the Greater Dublin Area and support effective regional development in Ireland.

Under this remit, the Northern and Western Regional Assembly has developed the “Regional Infrastructure Tracker”, which will:

1. Analyse the scale of investment in infrastructure projects of scale across the Northern and Western Region of Ireland between 2016 – which is the base year of the NPF – and April 2024.
2. Assess whether the National Strategic Outcomes and National Policy Objectives outlined within the NPF are being progressed in the 6 years since its adoption in 2018.
3. Document the scale of infrastructure deficits across the Northern and Western Region of Ireland, using an evidence-based approach.
4. Examine the level of infrastructure projects of scale that are in the pipeline to be delivered in the Northern and Western Region of Ireland as part of the implementation of the National Development Plan (NDP) (2021-2030).³⁰
5. Outline the infrastructure priorities of the Northern and Western Regional Assembly, in advance of the publication of the revised NPF and any future revision of the RSES of the Northern and Western Region of Ireland.

The purpose of the “Regional Infrastructure Tracker” will be to:

- ◇ Inform national, regional and local stakeholders on the latest developments regarding investment in the infrastructure of the Northern and Western Region of Ireland in advance of the publication of the revised NPF.
- ◇ Support the implementation of the RSES of the Northern and Western Region of Ireland, specifically “Regional Policy Objective” (RPO) 10.3, which states that *“The NWRA will publish (and update) an infrastructure tracker and progress report every two years.”*

²⁸ <https://www.nwra.ie/pdfs/NWRA-RSES-2020-2032.pdf>

²⁹ <https://www.npf.ie/wp-content/uploads/Project-Ireland-2040-NPF.pdf>

³⁰ <https://www.gov.ie/en/publication/774e2-national-development-plan-2021-2030/>

To achieve this, the “Regional Infrastructure Tracker” has:

- ◊ Identified the value of investments associated with public sector tenders for infrastructure projects by the NUTS 2 Regions of Ireland, between 2016 and April 2024. This information was developed using data from the private firm titled “Construction Information Services” (CIS).³¹
- ◊ Examined the performance of the infrastructure of the Northern and Western Region of Ireland – relative to Irish and European norms – using data from the European Commission’s “Regional Competitiveness Index”, Department of Health, Health Service Executive (HSE), Health Information and Quality Authority (HIQA), Department of Housing, Local Government and Heritage, Science Foundation Ireland, the Central Statistics Office (CSO), Uisce Éireann, Environmental Protection Agency (EPA), Eirgrid and other public bodies.
- ◊ Identified the regional distribution of infrastructure projects of scale which are currently in the pipeline to be delivered as part of the implementation of the NDP (2021-2030).³² This information was developed using material and data from the Department of Public Expenditure, NDP Delivery and Reform, with a particular focus on the [“MyProjectIreland Tracker”](https://www.gov.ie/en/collection/f828b-myprojectireland-interactive-map/).³³

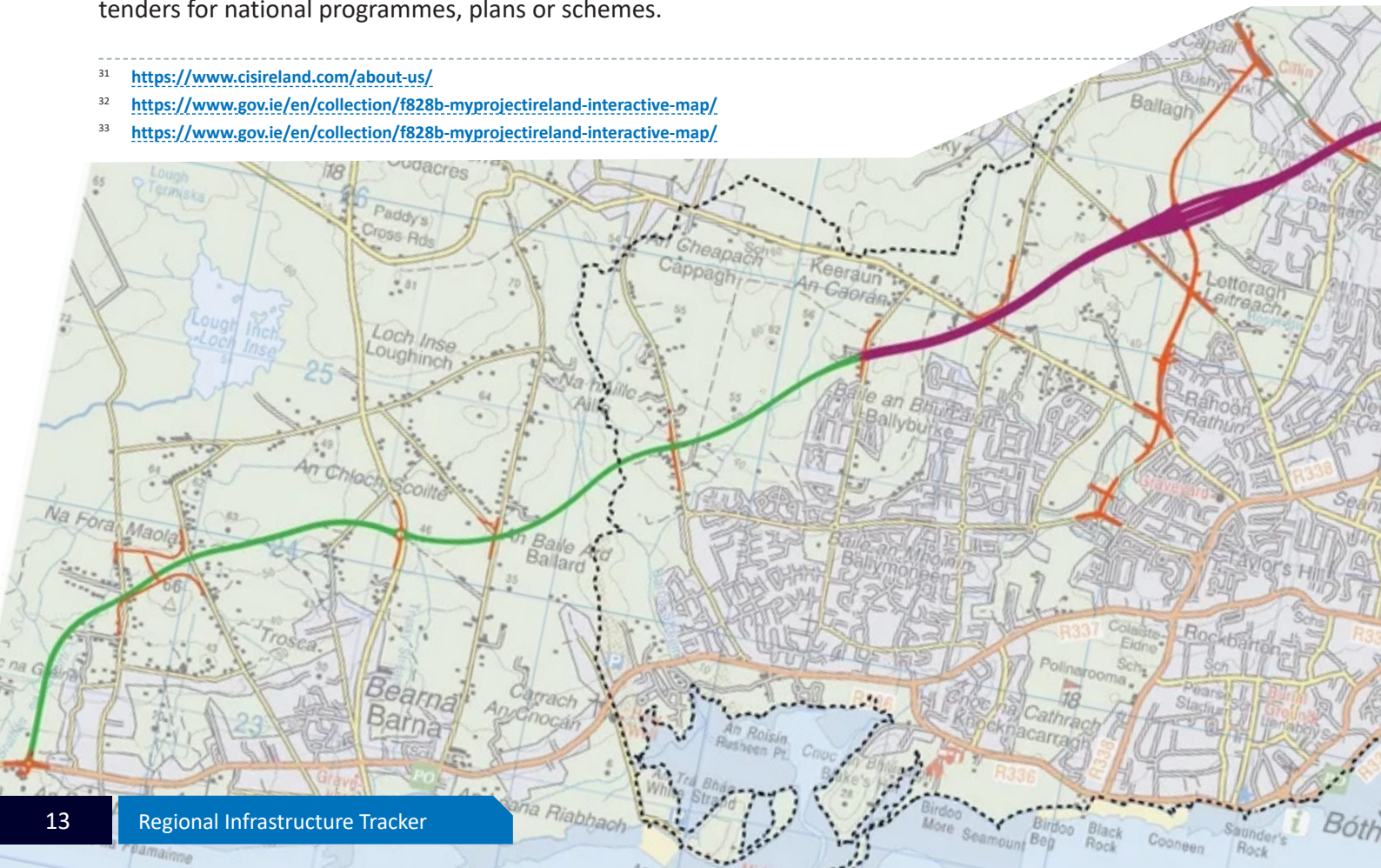
In developing the evidence base which has been outlined in Section 3 of this publication, the Northern and Western Regional Assembly acquired data from the private firm titled CIS. This firm identified the value of investments associated with public sector tenders for infrastructure projects by the NUTS 2 Regions of Ireland, between 2016 – which represents the base year of the NPF – and April 2024. CIS is a private sector firm which provides comprehensive, reliable, timely and verified real time data on the construction sector in Ireland.

In this regard, the data provided from CIS was obtained by examining information from a variety of sources, ranging from – but not limited to – e-Tenders, national and local newspapers and the websites of local authorities, central government, and semi-state bodies, with this information geocoded based on the geographical focus of the infrastructure project in question. The data focused on the value of public sector tenders that were announced for physical infrastructure projects by public bodies. The value of the investment in question is based on the stated value at the time of the publication of the public sector tender. In conjunction to this, the data only focused on public sector tenders that were distributed at a regional or local level, as opposed to public tenders for national programmes, plans or schemes.

³¹ <https://www.cisireland.com/about-us/>

³² <https://www.gov.ie/en/collection/f828b-myprojectireland-interactive-map/>

³³ <https://www.gov.ie/en/collection/f828b-myprojectireland-interactive-map/>



The information provided by CIS focused on public sector tenders which are not categorised under frameworks and which are for specific infrastructure projects that aim to be delivered in a given timeframe. Although the CIS data examined projects of all sizes, this publication only utilised data on public tenders for infrastructure projects of scale, which are projects valued at over €20 million – which would be in line with the Department of Public Expenditure, NDP Delivery and Reform’s definition of a major project³⁴ – while also examining tenders with a value of over €1 million.

In developing the evidence base outlined in Section 4 of this publication, the Northern and Western Regional Assembly utilised data from the European Commission’s “Regional Competitiveness Index” (2022), which measures the competitiveness of 234 NUTS 2 Regions in the EU27. In this regard, the index evaluates their performance across a wide range of areas such as – but not limited to – innovation capabilities, technology readiness, education, labour market conditions and infrastructure. The overall score of each NUTS 2 Region – and their subsequent performance with respect to each indicator – is measured relative to the EU27 average which has been set at an index score of 100. In this regard, the index score for the indicator titled “Infrastructure” is based on a region’s performance in terms of:

- ◆ **Road Transport:** Population accessible within 1 hour and 30 minutes by road in a neighbourhood within a 120km radius.
- ◆ **Rail Transport:** Population accessible within 1 hour and 30 minutes by rail (using optimal connections) in a neighbourhood within a 120km radius.
- ◆ **Accessibility to passenger flights:** Daily number of passenger flights.

³⁴ <https://www.gov.ie/en/collection/f828b-myprojectireland-interactive-map/>



Section 4 of this publication also examined data from the CSO in terms of population growth, data from the Department of Health, HSE and HIQA in terms of the National Patients Experience Survey, information from Science Foundation Ireland on their research centres, as well as examining data from the Department of Housing, Local Government and Heritage in terms of the distribution of residential units commenced and total social housing activity by the NUTS 2 Region of Ireland, as of 2023. Furthermore, Section 4 of this publication also analyses CSO data on fixed broadband connections, Eirgrid data on the region’s electrical grid and EPA data on river and lake water quality.

In Section 5 of this publication, the Assembly examined the regional distribution of infrastructure projects and programmes which are currently in the pipeline, as per the “MyProjectIreland Tracker”³⁵ which is managed by the Department of Public Expenditure, NDP Delivery and Reform. The purpose of this analysis was to provide some indication of the level of planned investment for the Northern and Western Region of Ireland as part of the implementation of the NDP (2021-2030), with a particular focus on infrastructure projects of scale given their importance in generating agglomeration benefits and supporting population growth. To achieve this, the Assembly examined the data presented in 2 excel tabs in the “MyProjectIreland Tracker”, specifically the tab titled “Database – Projects” and “Database – Programmes”.

In this regard, the “MyProjectIreland Tracker” provides detailed information about past, current and future infrastructure projects and programmes which have either been delivered or will be delivered as part of the implementation of the NDP (2021-2030) and which will support the implementation of the NPF and the RSES. The information presented in Section 5 of this publication examines the latest version of tracker which was gathered by the Department of Public Expenditure, NDP Delivery and Reform during Q1-2024, with the analysis in this publication based on the version of the dataset as of the 21st of May 2024.

As noted in the “introduction” tab on the “MyProjectIreland Tracker”, this information focuses on **“all the major projects and programmes currently part of Project Ireland 2040”** and **“focuses mainly on projects and programmes with costs greater than €20 million”**.³⁶ Consultations with officials from the Department of Public Expenditure, NDP Delivery and Reform found that although there were a few projects listed below the threshold of €20 million in previous versions of the tracker, it was noted that for this iteration it appears to have one listing below the €20 million threshold in the tab titled “Database – Programme” with the information presented in the tab titled “Database – Projects” focused on specific projects worth more than €20 million. Furthermore, the Minister’s statement at the launch of the “MyProjectIreland Tracker” notes it provides a composite update on the progress of all major investments in the pipeline that make up Project Ireland 2040.³⁷

Therefore, while the dataset is not displaying all of the infrastructure projects that are currently in the pipeline under the NDP (2021-2030), it is displaying information on all of the infrastructure projects and programmes worth more than €20 million, thereby providing some indication of the level of planned investment in infrastructure projects of scale in the region under the NDP 2021-2030. It should also be noted that the latest “MyProjectIreland Tracker” is a point in time and this data is subject to future updates by the Department of Public Expenditure, NDP Delivery and Reform. In the final section of this publication – namely Section 6 – the Northern and Western Regional Assembly makes a number of recommendations on how a policy of “Positive Discrimination” can be adopted towards the Northern and Western Region of Ireland, as a means of addressing the region’s sizeable infrastructure deficits and tackling rising regional disparities in Ireland.

³⁵ <https://www.gov.ie/en/collection/f828b-myprojectireland-interactive-map/>

³⁶ Based on consultations with officials in the National Investment Office (Department of Public Expenditure, NDP Delivery and Reform) on the 30th of April 2024 and in line with content presented in the “MyProjectIreland Tracker”

³⁷ <https://www.gov.ie/en/press-release/7b92d-minister-donohoe-launches-updated-project-ireland-2040-progress-tracker/>

Underinvestment in Infrastructure Assets

3

The Northern and Western Region of Ireland has been historically underserved in the provision of high quality infrastructure, whether it be in traditional forms of infrastructure – such as roads, rail or ports – or more modern forms of infrastructure such as broadband and research facilities. This underinvestment is obvious throughout the region. Counties such as Donegal, Cavan and Monaghan have no access to rail services, the motorway network of the region is nearly entirely concentrated around Galway City, while higher education and research facilities are particularly lacking in the Border counties.

Given the scale of these infrastructure deficits, it is clear that the Northern and Western Region of Ireland has received below average levels of public investment in its infrastructure assets compared to the other NUTS 2 Regions of Ireland. With this in mind, Section 3 of this publication will establish the scale of underinvestment in the infrastructure assets of the Northern and Western Region of Ireland, focusing on public investment across all types of infrastructure assets.

To gauge the level of capital investment that has been committed or provided to the infrastructure assets of the Northern and Western Region of Ireland, the Assembly has sourced investment data that focuses on 2 high-level areas, namely:

1. The value of investments from public sector tenders that were either for or associated with infrastructure projects by the NUTS 2 Regions of Ireland, between 2016 – which is the base year of the National Planning Framework (NPF) – and April 2024. This information was acquired from the private firm titled “Construction Information Services” (CIS), with this information focusing on public investments across all types of infrastructure assets.
2. The value of investments that have either been delivered or have been committed to by government departments and agencies under relevant public investment programmes related to all types of infrastructure assets.

In terms of the CIS data, this information was obtained through a variety of sources, ranging from – but not limited to – e-Tenders, national and local newspapers and the websites of local authorities, central government and semi-state bodies, with this information geocoded based on the geographical focus of the infrastructure project in question. The data focused on the value of tenders that were announced by public bodies, which were either for or associated with physical infrastructure projects in all sectors of the economy, ranging from – but not limited to – transport, health, housing, education, water and sewage services or community facilities.

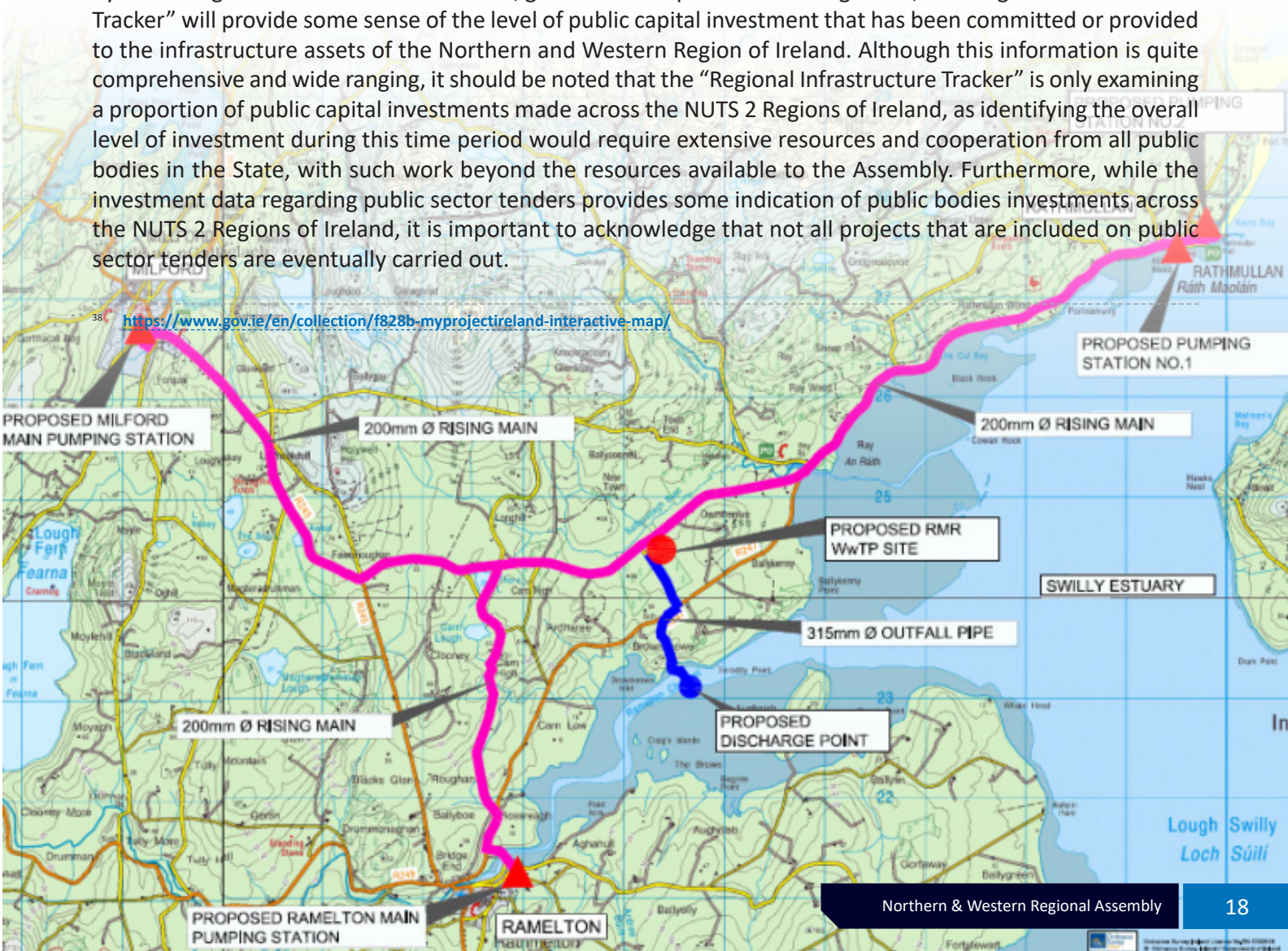


The value of the investment in question is based on the stated value of the public sector tender at the time of its publication, while the data only focused on public sector tenders that were distributed at a regional or local level, as opposed to public tenders for national programmes, plans or schemes. The information provided by CIS was presented for standalone infrastructure projects, namely tenders which are not categorised under frameworks, which are for specific infrastructure projects that aim to be delivered in a given timeframe or construction services that will be required in the delivery of these projects. Although the CIS data examined tenders of all sizes, the “Regional Infrastructure Tracker” only utilised investment data on:

- ◊ Public sector tenders that were worth more than €1 million that were either for or associated with standalone infrastructure projects.
- ◊ Public sector tenders that were worth more than €20 million that were either for or associated with standalone infrastructure projects. This would be a sub-set of the above and would aim to capture the scale of investment in major infrastructure projects of scale, which are regarded as being worth more than €20 million as per the definition used by the Department of Public Expenditure, NDP Delivery and Reform.³⁸ The delivery of major infrastructure projects of scale will be central to addressing the region’s sizeable infrastructure deficits and supporting effective regional development in Ireland.

In conjunction with this, the Northern and Western Regional Assembly also examined the value of public investments that have either been delivered or have been committed to by government departments and agencies under relevant public investment programmes related to all types of infrastructure assets. In this regard, the Assembly focused on important public investment programmes – such as but not limited to – Transport Infrastructure Ireland’s (TII) Capital Expenditure Programme (i.e. National Roads), the Fisheries Harbour and Coastal Infrastructure Programme, the Regional Airports Programme and the Active Travel Investment Programme.

By examining the investment data from CIS, government departments and agencies, the “Regional Infrastructure Tracker” will provide some sense of the level of public capital investment that has been committed or provided to the infrastructure assets of the Northern and Western Region of Ireland. Although this information is quite comprehensive and wide ranging, it should be noted that the “Regional Infrastructure Tracker” is only examining a proportion of public capital investments made across the NUTS 2 Regions of Ireland, as identifying the overall level of investment during this time period would require extensive resources and cooperation from all public bodies in the State, with such work beyond the resources available to the Assembly. Furthermore, while the investment data regarding public sector tenders provides some indication of public bodies investments across the NUTS 2 Regions of Ireland, it is important to acknowledge that not all projects that are included on public sector tenders are eventually carried out.



3.1: Regional Distribution of Public Tenders (+ €1 million)

Figure 1 displays the distribution of investment associated with public tenders that were worth more than €1 million by the NUTS 2 Regions of Ireland, with this data examining public sector tenders that were either for or associated with standalone infrastructure projects. It is important to note that the data only focused on public sector tenders that were issued between 2016 and April 2024 and which were distributed at a regional or local level, as opposed to public tenders for national programmes, plans or schemes.

Notably, only 9.9 per cent of the investment committed under these types of public tenders were for infrastructure projects in the Northern and Western Region of Ireland, despite the region accounting for 17.6 per cent of Ireland's population – as per Census 2022 – and 17.7 per cent of Ireland's population in 2023, as per the latest population estimates from the CSO.³⁹ A similar situation was evident for the Southern Region of Ireland, with this region accounting for 23.6 per cent of the investment committed under these types of public tenders, which was below its share of Ireland's population which was 33.1 per cent, as per Census 2022. In contrast, 66.5 per cent of the investment committed under these types of public tenders were for infrastructure projects located in the Eastern and Midland Region of Ireland, which was higher than the region's corresponding share of Ireland's population (49.3 per cent as per Census 2022). In absolute terms, this implies that public sector tenders – which were worth more than €1 million and were related to infrastructure projects – committed to delivering investments amounting to €2.7 billion in the Northern and Western Region of Ireland, with the corresponding totals for the Southern Region and the Eastern and Midland Region amounting to €6.4 billion and €18.1 billion respectively.

This information is also available on a county level. As can be seen from Figure 2, only 2.8 per cent of the investment committed under these types of public tenders were for infrastructure projects in Galway, despite the county accounting for 5.4 per cent of Ireland's population in Census 2022. Similar trends were also evident across the remaining counties of the Northern and Western Region of Ireland, with Leitrim – at 0.1 per cent – recording the lowest share of investments committed under these types of public tenders, compared to its share of Ireland's population which is 0.7 per cent in Census 2022.

³⁹ <https://data.cso.ie/table/PLA03>

3.2: Regional Distribution of Public Tenders (+ €20 million)

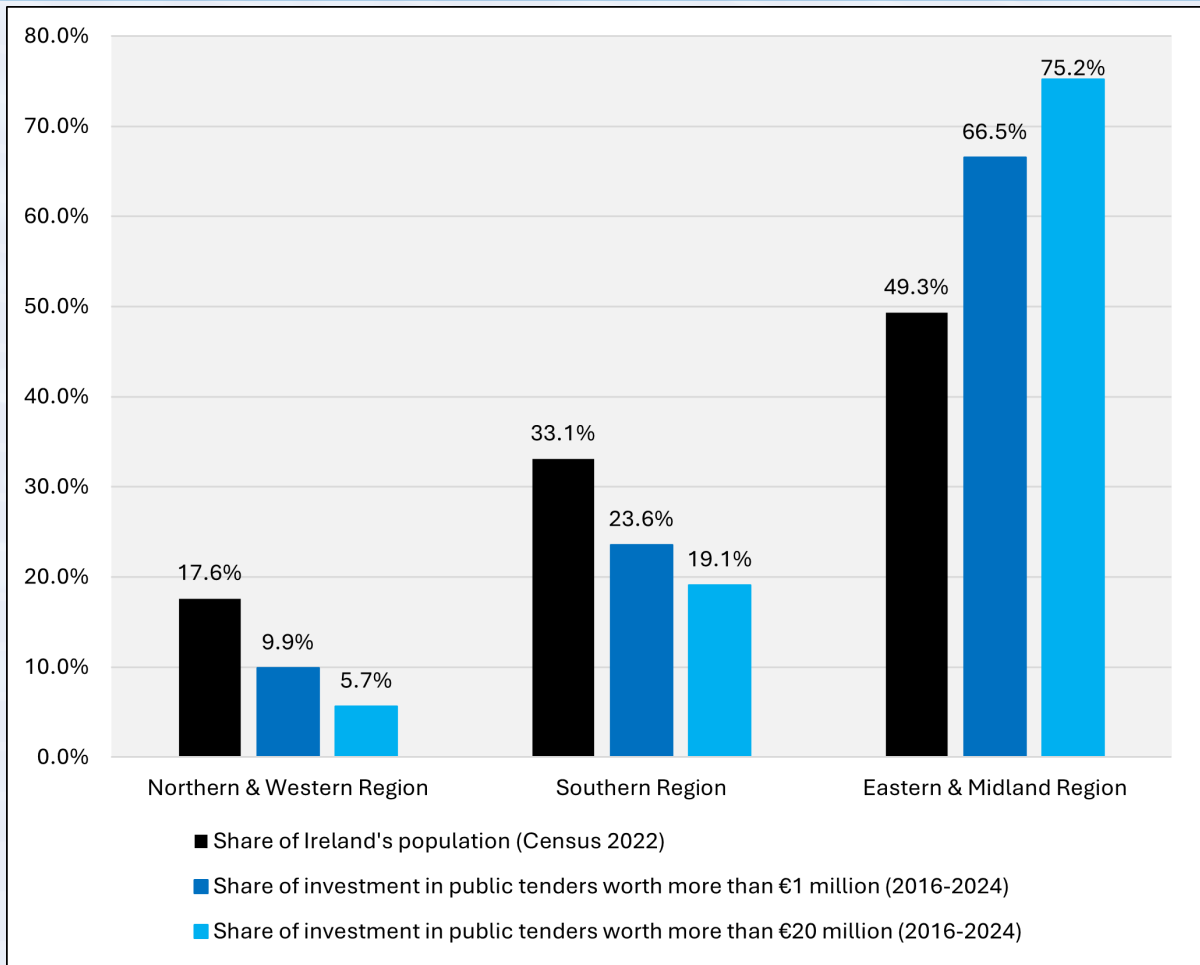
As a means of identifying more large scale investments on a regional level, Figure 1 displays the distribution of investment associated with public sector tenders that were worth more than €20 million by the NUTS 2 Regions of Ireland, with this data examining public sector tenders related to standalone infrastructure projects. It is important to note that the data only focused on public sector tenders that were issued between 2016 and April 2024 and which were distributed at a regional or local level, as opposed to public tenders for national programmes, plans or schemes.

Despite the sizable infrastructure deficits of the Northern and Western Region of Ireland, only 5.7 per cent of the investment committed under these types of public tenders were for infrastructure projects in the Northern and Western Region of Ireland, despite the region accounting for 17.6 per cent of Ireland's population in Census 2022 and 17.7 per cent of Ireland's population in 2023, as per the CSO's latest population estimates. A similar situation was evident for the Southern Region of Ireland, with this region accounting for 19.1 per cent of the investment committed under these types of public tenders, which was below its share of Ireland's population which was 33.1 per cent. Notably, despite accounting for 49.3 per cent of Ireland's population in Census 2022, just over 75 per cent of the investment committed under these types of public tenders were for projects located in the Eastern and Midland Region of Ireland. In absolute terms, this implies that public sector tenders – which were worth more than €20 million and were related to infrastructure projects – committed to delivering investments amounting to €1.2 billion in the Northern and Western Region of Ireland, with the corresponding totals for the Southern Region and the Eastern and Midland Region amounting to €3.9 billion and €15.5 billion respectively.

This information is also available on a county level. As can be seen from Figure 2, only 1.5 per cent of the investment committed under these types of public tenders were for infrastructure projects located in Donegal, despite the county accounting for 3.2 per cent of Ireland's population in Census 2022. Similar trends were also evident across the remaining counties of the Northern and Western Region of Ireland, with Cavan and Roscommon – at 0.1 per cent each – both recording the lowest share of investments committed under these types of public tenders between 2016 and April 2024, which was lower than their respective shares of Ireland's population. Based on this dataset, no public sector tenders worth more than €20 million were issued in Monaghan or Leitrim during this time period.

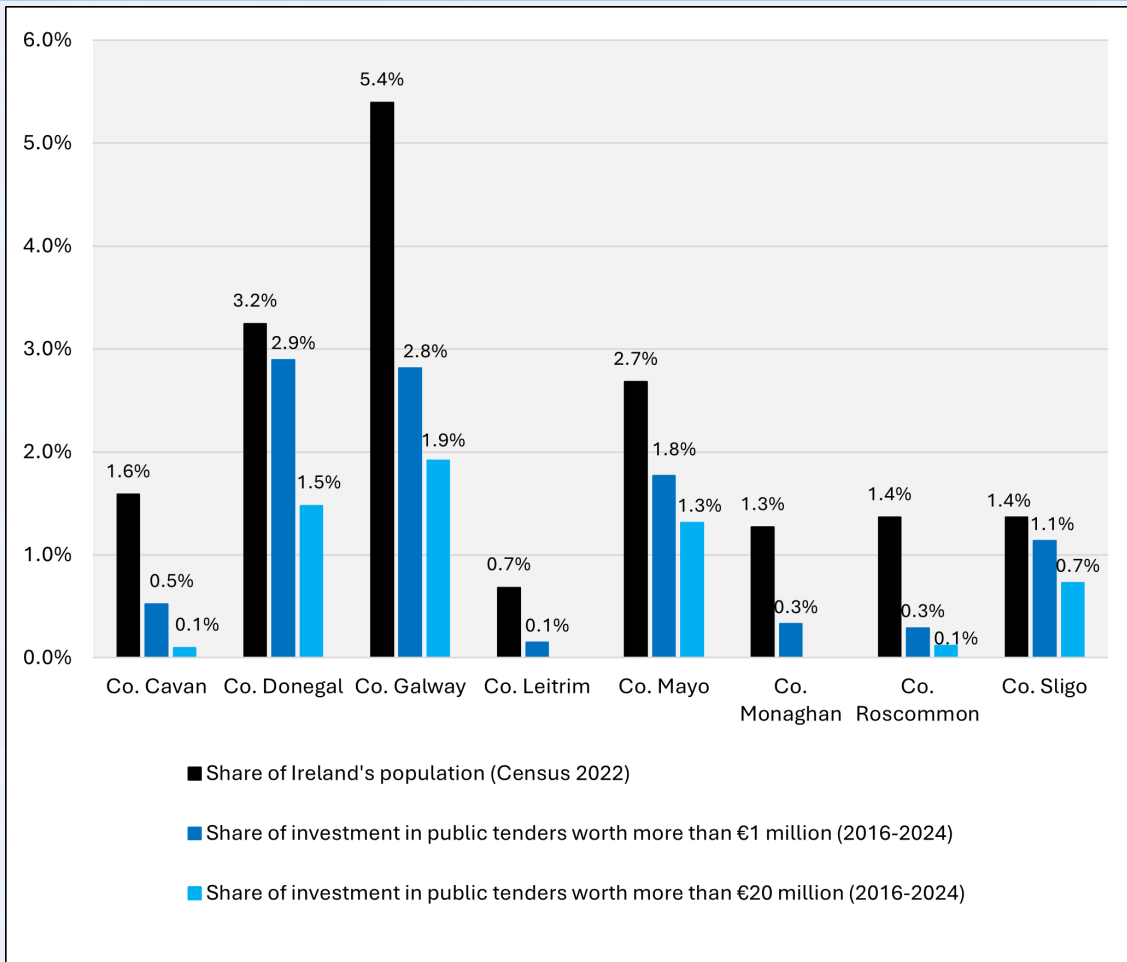


Figure 1: Distribution of investment for public tenders worth more than €1 million and €20 million, announced between 2016 and April 2024, by the NUTS 2 Regions of Ireland, vs their share of Ireland's population (2022)



Source: Northern and Western Regional Assembly using data from CIS. Census 2022

Figure 2: Distribution of investment for public tenders worth more than €1 million and €20 million, announced between 2016 and April 2024, by the counties of the Northern and Western Region, vs their share of Ireland's population (2022)



Source: Northern and Western Regional Assembly using data from CIS. Census 2022

3.3: Other Infrastructure Programmes

In addition to allocating investment via public sector tenders, public capital investments across the NUTS 2 Regions of Ireland are also provided through investment programmes which are managed by various government departments and agencies. Depending on the type of capital investment and the subsequent requirements of the infrastructure project, the allocations under these programmes may have or will form the basis for a designated public sector tender, but to what extent remains to be seen based on the data provided by the government departments and agencies in question.

Nevertheless, this sub-section will briefly examine a sample of investment programmes that are relevant to the key infrastructure assets of the Northern and Western Region of Ireland, examining the scale of investment in the region. Some areas showed a lack of capital investment in the Northern and Western Region of Ireland, with other areas showing above average levels of investment. Where possible, the Northern and Western Regional Assembly has focused on public investments over time – but in certain circumstances – data was not available upon request. In these cases, the publicly stated allocations for the latest available year were examined. It is also important to note that the data examined in this sub-section predominantly focused on payments that were made in the Northern and Western Region of Ireland – as opposed to the content in sub-sections 3.1 and 3.2 – which focused on investments that were announced as part of a tender process in the region. The key details of these investment programmes have been outlined below.

- ◇ **Higher Education Infrastructure:** General capital funding for Higher Education Institutes is managed by the Higher Education Authority and refers to funding provided for undergraduate and teaching facilities. Between 2013 and 2023, the Higher Education Institutes based in the Northern and Western Region of Ireland – on average – received “general capital funding”⁴⁰ of €310 per undergraduate enrolled,⁴¹ which was below the corresponding national ratio of €381 during this time period.⁴² Likewise, between 2019 and 2023, the Higher Education Institutes based in the Northern and Western Region of Ireland – on average – received “general capital funding”⁴³ of €453 per undergraduate enrolled, which was below the corresponding national ratio of €525 during this time period.
- ◇ **Research Infrastructure:** Research capital funding for Higher Education Institutes is managed by the Higher Education Authority and refers to funding provided for research and postgraduate facilities.⁴⁴ Between the academic years of 2019 and 2023, the Higher Education Institutes based in the Northern and Western Region of Ireland received €2.8 million in “research capital funding”,⁴⁵ accounting for just 15 per cent of the total allocation during this time period. This was below the Northern and Western Region’s estimated share of Ireland’s population in 2023 – which was estimated to be 17.7 per cent – and below the region’s share of Ireland’s population as per Census 2022, which was 17.6 per cent.
- ◇ **National Roads Infrastructure:** Between 2006 and 2022, the Local Authorities of the Northern and Western Region of Ireland – on average – received funding of €120,156 for national roads⁴⁶ per km of such roads, which was below the national ratio of €187,272 during this time period. Funding in this regard is distributed to the Local Authorities via TII.

⁴⁰ Northern and Western Regional Assembly calculations based on data from the Higher Education Authority. General capital funding refers to funding provided for undergraduate and teaching facilities

⁴¹ Includes full time, part time and remote undergraduate students

⁴² Nominal terms

⁴³ Northern and Western Regional Assembly calculations based on data from the Higher Education Authority. General capital funding refers to funding provided for undergraduate and teaching facilities

⁴⁴ Research Capital refers to payments relating to Postgraduate/Research Facilities – in the past primarily relating to capital funding via the Programme for Research in Third Level Institutions (PRTL). However, for 2023, the increase in funding is due to the 2023 Higher Education Research Equipment Grant.

⁴⁵ Northern and Western Regional Assembly calculations based on data from the Higher Education Authority. Research capital funding refers to funding provided for research and postgraduate facilities

⁴⁶ Includes funding for motorways, dual carriageways, single national roads and two plus one roads.

- ◊ **Rural Regeneration Development Fund (RRDF):** Between 2018 and 2024, the Local Authorities of the Northern and Western Region of Ireland were allocated €261.8 million under the RRDF, accounting for 45 per cent of funding allocations that have been made under this scheme. This was notably higher than the Northern and Western Region’s estimated share of Ireland’s population in 2023 – which was estimated to be 17.7 per cent – and higher than the region’s share of Ireland’s population as per Census 2022, which was 17.6 per cent. Given the rural composition of the region, this is to be expected and is to be welcomed.
- ◊ **Urban Regeneration Development Fund:** Under Call 1 of the URDF, projects located within the Northern and Western Region of Ireland were allocated 10.4 per cent of funding allocations that were made under the scheme, with the corresponding ratios being 13.3 per cent and 14.7 per cent for Calls 2 and 3 respectively. Between Calls 1, 2 and 3 of the URDF, projects which were based in the Northern and Western Region of Ireland were allocated €234 million under the scheme, accounting for 12.8 per cent of funding allocations that have been made under this scheme as of the 12th of June 2024. This was lower than the Northern and Western Region’s estimated share of Ireland’s population in 2023 – which was estimated to be 17.7 per cent – and lower than the region’s share of Ireland’s population as per Census 2022, which was 17.6 per cent.
- ◊ **Croí Cónaithe (Cities) Scheme:** The Croí Cónaithe (Cities) Scheme is a fund to support the building of 5,000 apartments for sale to owner-occupiers. The Scheme aims to bridge the current “Viability Gap” between the delivery cost of building apartments and the market sale price – where the cost of building is greater – in the five cities of Ireland, namely Dublin, Cork, Limerick, Galway and Waterford. The Scheme formally launched on the 10th of May 2022.

Based on consultations with the Housing Agency, five contracts have been signed for the delivery of 582 units in total as of the 12th of June 2024. Two of the contracts are for developments in Dublin (Eastern and Midland Region of Ireland) and three contracts are for developments in Cork (Southern Region of Ireland), with no contracts signed for projects located in Galway City. Per the structure of the Croí Cónaithe (Cities) Scheme there has not been a distribution of funding to date, as funding support is only payable to a developer at the point of final conveyance of an apartment to an eligible owner-occupier. The five contracts approved to date are scheduled for completion during the course of 2025 and 2026.

- ◊ **Regional Airports Programme:** The Regional Airports Programme (RAP) supports Ireland’s regional airports which handle fewer than one million passengers per annum. Under the RAP, core airport activities and operations are supported under three funding schemes namely:
 - » *Public Policy Remit – Capital (PPR-C) Scheme:* According to the Department of Transport, this scheme supports core airport non-economic investment in areas such as air traffic control, safety and security, ensuring airports maintain compliance with relevant EU safety and security regulatory requirements. Such aid is not considered State aid as it falls within the “Public Policy Remit”. In line with national policy, up to 90 per cent of the cost of eligible capital projects are supported. The distribution of funding across airports is dependent on the cost of eligible capital grant proposals put forward by airports each year for assessment. In recent years, the Department noted that the budget has been sufficient to cover the cost of 100 per cent of all eligible project proposals put forward by airports under this scheme.
 - » *Public Policy Remit – Operational (PPR-O) Scheme:* As per the Assembly’s consultations with the Department of Transport, it was noted that this scheme supports core airport non-economic activity in the areas of air traffic control, safety and security. In line with national policy, and subject to the availability of budgetary resources in each given year, up to 100 per cent of eligible non-economic payroll and operational costs at airports are supported. If the available budget is not sufficient to cover all eligible payroll costs, then the available budget is apportioned on a pro-rata basis, aligned to the forecast expenditure put forward by each airport in that year. In years where available funding has exceeded the total eligible payroll costs, 100 per cent of payroll costs are first met with the balance of funding being allocated towards other non-economic expenditure. This funding may also need to be apportioned on a pro rata basis across airports, dependent on the available budget.
 - » *CAPEX Scheme:* According to the Department of Transport, this scheme supports core airport capital investment of an economic nature, such as runway works. In line with State aid rules, this scheme

provides for up to 75 per cent grant aid to support eligible capital projects, for airports with fewer than one million passengers per annum. The distribution of funding across airports is dependent on the cost of eligible capital grant proposals put forward by airports each year for assessment. In recent years the budget has been sufficient to cover the cost of 100 per cent of all eligible project proposals put forward by airports under this scheme. In line with State aid rules, investment in non-core airport activities of an economic nature – such as hospitality, duty free, car parks and retail – are not supported under the Programme.

Furthermore, the Programme also supports a Public Service Obligation (PSO) Air Service Scheme. The PSO Air Service scheme supports regional connectivity by providing subsidised air services to remote regions. Based on a competitive tender process, this scheme provides financial support to airlines to operate essential air services to these types of regions, with a PSO service operating between Dublin and Kerry Airport and Dublin and Donegal Airport. Under these various schemes, the RAP has provided funding supports to the following 4 regional airports in Ireland, namely:

- ✿ Donegal Airport
- ✿ Ireland West Airport Knock (IWAK)
- ✿ Kerry Airport
- ✿ Waterford Airport

In addition to providing funding to these regional airports, the RAP also provided funding to both Shannon and Cork Airports due to the significant impact of COVID-19. Prior to the outbreak of COVID-19, both Shannon and Cork Airports were not eligible for funding under the RAP. Payments under the RAP have also been made for emergency subvention – in the case of Waterford Airport between 2018 and 2020 – and emergency capital supports, in the case of Shannon Airport between 2020 and 2022.

Between 2020 and 2023, both Shannon and Cork Airport at various stages have received funding under the RAP via the CAPEX, PPR-C, PPR-O and the Covid Supplementary Support Scheme, with funding under the RAP also being provided to the 4 regional airports that were traditionally eligible. Taking into account all of the funding allocations provided under the RAP,⁴⁷ the distribution of funding between 2013 and 2023 was as follows:

- ✿ Shannon Airport at €47 million
- ✿ IWAK at €44.9 million
- ✿ Cork Airport at €40.9 million
- ✿ Kerry Airport at €23.5 million
- ✿ Donegal Airport at €10 million
- ✿ Waterford Airport at €7.5 million.

It is important to acknowledge the distribution of these figures in the context of the original aim of the RAP which is to support Ireland's smallest airports. Notwithstanding the need to support airports such as Shannon and Cork during the COVID-19 pandemic, it will be imperative – going forward – that the RAP returns to its original aim of supporting Ireland's relatively smaller regional airports, which are airports with less than 1 million passengers per annum.

- ◊ **Fishery Harbour and Coastal Infrastructure Development Programme:** Between 2016 and 2021, Local Authorities across Ireland received €15.5 million in funding from the Department of Agriculture, Food and the Marine (DAFM) under the Fishery Harbour and Coastal Infrastructure Development Programme for capital projects undertaken. The Department of Agriculture, Food and the Marine co-funded up to 75 per cent of the total cost of the approved projects, with the Local Authorities providing the balance.

More recently, funding was provided through the Brexit Adjustment Local Authority Marine Infrastructure Scheme 2022-2023. This was a 2-year scheme from 2022 to 2023, with the Local Authorities of Ireland receiving €37.8m in funding. The Department of Agriculture, Food and the Marine co-funded up to 95 per cent of the total cost of the approved projects, with the Local Authorities providing the balance. In

⁴⁷ Capex, PPR-C, PPR-O, COVID-19 Supplementary Support Scheme, OPEX (i.e. Scheme in place up until 2020 - Funding safety and security related operational expenditure of an economic nature - no airports eligible since 2016 Scheme) and "Emergency Subvention" and "Emergency Capital Supports".

addition to this, the six designated Fishery Harbour Centres which are owned, managed and maintained by the Department of Agriculture, Food and the Marine also were provided funding under the Fishery Harbour and Coastal Infrastructure Development Programme.⁴⁸ Capital works in this regard are fully funded by the Department. From the period 2016 to 2023, a total of €193m has been invested in the 6 Fishery Harbour Centres.

Taking into account these 3 different elements of capital funding under the Fishery Harbour and Coastal Infrastructure Development Programme, the Local Authorities and the State owned Fishery Harbour Centres within the Northern and Western Region of Ireland received €106.2 million of capital funding between 2016 and 2023, accounting for 43.1 per cent of funding allocated during this time period. This was notably higher than the Northern and Western Region's estimated share of Ireland's population in 2023 – which was estimated to be 17.7 per cent – and higher than the region's share of Ireland's population as per Census 2022, which was 17.6 per cent. Given the extensive coastline of the Northern and Western Region of Ireland, this is to be expected and is to be welcomed.

- ◊ **Active Travel Infrastructure:** The National Transport Authority (NTA) allocates investments under the “Active Travel Investment Programme”, with these allocations supporting investments which will improve walking and cycling infrastructure across the Local Authorities of Ireland.

Between 2016 and 2024, the Local Authorities in the Northern and Western Region of Ireland were allocated €174.8 million under the Active Travel Investment Programme,⁴⁹ accounting for 11 per cent of the total allocation for this time period. This was below the Northern and Western Region's estimated share of Ireland's population in 2023 – which was estimated to be 17.7 per cent – and below the region's share of Ireland's population as per Census 2022, which was 17.6 per cent. Notably, the Local Authorities in the Northern and Western Region of Ireland received below average allocations in each year between 2016 and 2023. Population estimates for the Northern and Western Region of Ireland as of 2024 were unavailable at the time of writing of this publication.

- ◊ **Sports Capital and Equipment Programme:** The Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media allocates investments under the Sports Capital and Equipment Programme, with these allocations supporting the development of sports facilities and the purchase of non-personal sports equipment.

Between 2011 and 2023, the counties of the Northern and Western Region of Ireland were allocated €70 million under the Sports Capital and Equipment Programme, accounting for 18 per cent of the total allocation for this time period. This was marginally above the Northern and Western Region's estimated share of Ireland's population in 2023 – which was estimated to be 17.7 per cent – and above the region's share of Ireland's population as per Census 2022, which was 17.6 per cent. The Northern and Western Region of Ireland received above average allocations in 7 out of the 13 years between 2011 and 2023.⁵⁰

- ◊ **Regional and Local Roads:** The Department of Transport allocates funding for regional and local roads to each Local Authority in Ireland. According to the Department of Transport, funding allocations from 2013 to 2019 were based on regional and local roads lengths of 2012 with a review undertaken in 2019. Following the review, 2019 lengths were utilised to ensure funding is allocated on as fair and equitable a basis as possible to ensure that all local authorities are in receipt of funds to maintain the network. Between 2014 and 2024 – and taking into account the appropriate road lengths for this period – the Local Authorities of the Northern and Western Region of Ireland – on average – received funding of €4,643 for regional and local roads per km of such roads, which was below the national ratio of €5,079 during this time period.

⁴⁸ Castletownbere, Dingle, Dunmore East, Howth, Killybegs and Ros An Mhíl

⁴⁹ This information was provided to the Northern and Western Regional Assembly by the NTA through a private request. These figures include 2020 COVID-19 payments and only focuses on funding provided to Local Authorities. Separate to the funding allocations to Local Authorities, the NTA also provides funding under the Active Travel Investment Programme for “Campuses, hospitals, Educational Facilities and Others Facilities” at a national level.

⁵⁰ Some adjustments were made to the figures on the department websites to take into account the geographical distribution of the allocations. For example, in 2011, allocations for 43 boxing clubs were moved from the broad category titled “IABA Dublin” to the respective counties of each club. In 2012, funding allocations for 1 boxing club was moved from IABA Dublin to Limerick. In 2020, 2 payments that were categorised without a county, were moved to the counties in which the recipient clubs were located. In 2021, 1 payment was categorised without a county and subsequently categorised under Cavan, as this was where the recipient club was located. Similar adjustments made in 2023.

Consequences of Underinvestment

4



It is clear that there has been a lack of investment in the infrastructure of the Northern and Western Region when compared to other regions in Ireland, with such underinvestment leading to significant economic, environmental and social consequences. What is also apparent, is that the legacy of extensive infrastructure gaps across the Northern and Western Region of Ireland - particularly in motorways, national primary routes and rail - has not been addressed, despite repeated commitments from governments dating as far back as the National Development Plan (NDP) of 2000-2006.

Although the consequences of underinvestment in this regard are quite wide-ranging, Section 4 of this publication is going to focus on two high-level consequences from a regional economic perspective, focusing on:

- Sizeable regional infrastructure deficits
- Rising regional disparities

4.1: Transport Infrastructure Deficits

The scale of underinvestment in the infrastructure assets of the Northern and Western Region of Ireland is leading to significant infrastructure deficits within the region, particularly in the region's transport network. This is confirmed by data from the European Commission's "Regional Competitiveness Index 2022"⁵¹ which found that the Northern and Western Region's transport infrastructure was ranked 218th out of the 234 NUTS 2 Regions examined in the index.

Specifically, the European Commission's "Regional Competitiveness Index" measures the competitiveness of 234 NUTS 2 Regions in the EU27, evaluating their performance across a wide range of areas such as – but not limited to – innovation capabilities, technologies readiness, education, labour market conditions and infrastructure. The overall score of each NUTS 2 Region – and their subsequent performance with respect to each indicator – is measured relative to the EU27 average which has been set at an index score of 100. At a national level, Ireland – relative to the EU27 average – was found to be relatively strong across a number of areas – including but not limited to – innovation capabilities, technological readiness, higher education and lifelong learning,

That said, where Ireland notably underperforms is in the area of "Infrastructure", with notably poor performances in the Northern and Western Region and the Southern Region of Ireland credited to this score. In this regard, the index score of the indicator titled "Infrastructure" is based on a NUTS 2 Region's performance with respect to the following sub-indicators, namely:

- **Road Transport:** Population accessible within 1 hour and 30 minutes by road in a neighbourhood within a 120km radius.
- **Rail Transport:** Population accessible within 1 hour and 30 minutes by rail (using optimal connections) in a neighbourhood within a 120km radius.
- **Accessibility to passenger flights:** Daily number of passenger flights.

⁵¹ https://ec.europa.eu/regional_policy/assets/regional-competitiveness/index.html#/

In terms of the “Infrastructure” index scores, the Eastern and Midland Region recorded an above-average index score of 115.2, compared to the State average of 79.5 and an EU27 average of 100. In contrast, Ireland’s most rural region under the NPF – namely the Northern and Western Region of Ireland – registered an “Infrastructure” index score of only 34.1, whilst the Southern Region of Ireland also recorded a below-average score of 50.7, as evident from Figure 3. The score for the Eastern and Midland Region of Ireland is reflective of the trend across the EU27, whereby “Capital City” regions are the most competitive in all Member States except Germany, Italy, and the Netherlands. The more competitive countries tend to have a smaller gap between their “Capital City” region and the other NUTS 2 Regions.

In terms of rankings, out of the 234 NUTS 2 Regions examined in the European Commission’s “Regional Competitiveness Index”, the Northern and Western Region of Ireland’s “Infrastructure” index score was ranked 218th, implying that the region had the 17th worst “Infrastructure” ranking and was in the bottom 20 NUTS 2 Regions in terms of “Infrastructure”. In contrast, the Eastern and Midland Region’s “Infrastructure” ranking was 54th out of the 234 NUTS 2 Regions examined in the index.

As evident from Table 2, the “Infrastructure” index score of the Northern and Western Region of Ireland would be similar to the performance of regions that are categorised by the European Commission as “Less Developed Regions”. It is important to note that the European Commission categorises a region as a “Less Developed Region” when its GDP per capita is less than 75 per cent of the EU27 average (PPS)⁵² for the appropriate evaluation period.⁵³ In contrast, the Northern and Western Region of Ireland is ranked as a “Transition Region”, which is a region with a GDP per capita between 75 per cent and 100 per cent of the EU27 average (PPS), with the Southern Region and the Eastern and Midland Region of Ireland defined as “More Developed Regions”, namely regions with a GDP per capita that is above 100% of the EU27 average.

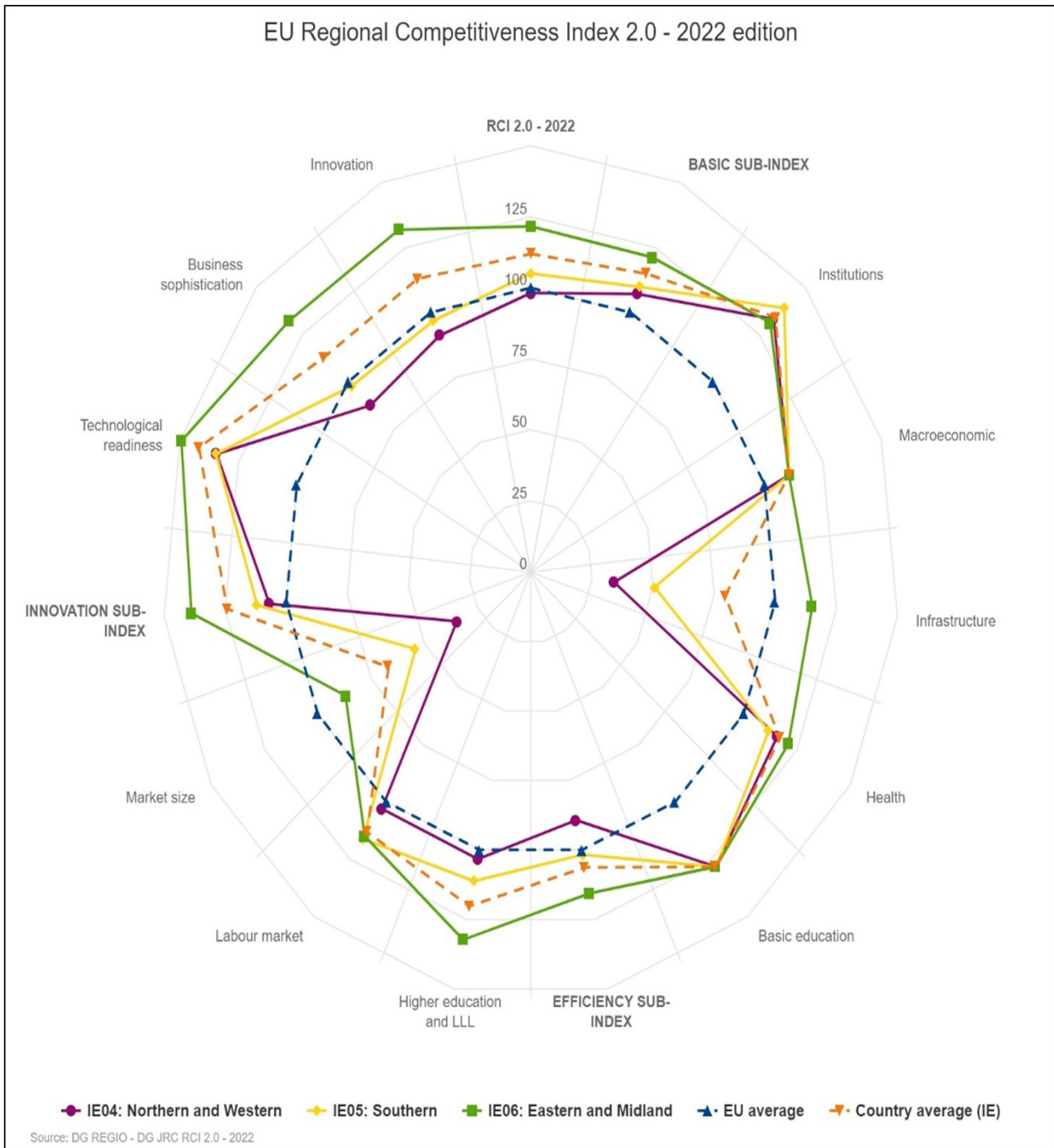
In this regard, the Northern and Western Region of Ireland would have a similar “Infrastructure” index score to that of “Less Developed Regions” such as:

- ◆ Sud-East, Vest, Nord-Est, Sud-Vest Oltenia and Centru in Romania
- ◆ Dél-Dunántúl in Hungary
- ◆ Anatoliki Makedonia Thraki, Dytiki Makedonia and Ipeiros in Greece
- ◆ Východné Slovensko and Stredné Slovensko in Slovakia
- ◆ Severoiztochen, Severen tsentralen and Severozapaden in Bulgaria
- ◆ Świętokrzyskie in Poland

⁵² PPS = Purchasing Power Standard. Latest evaluation period between 2015-2017

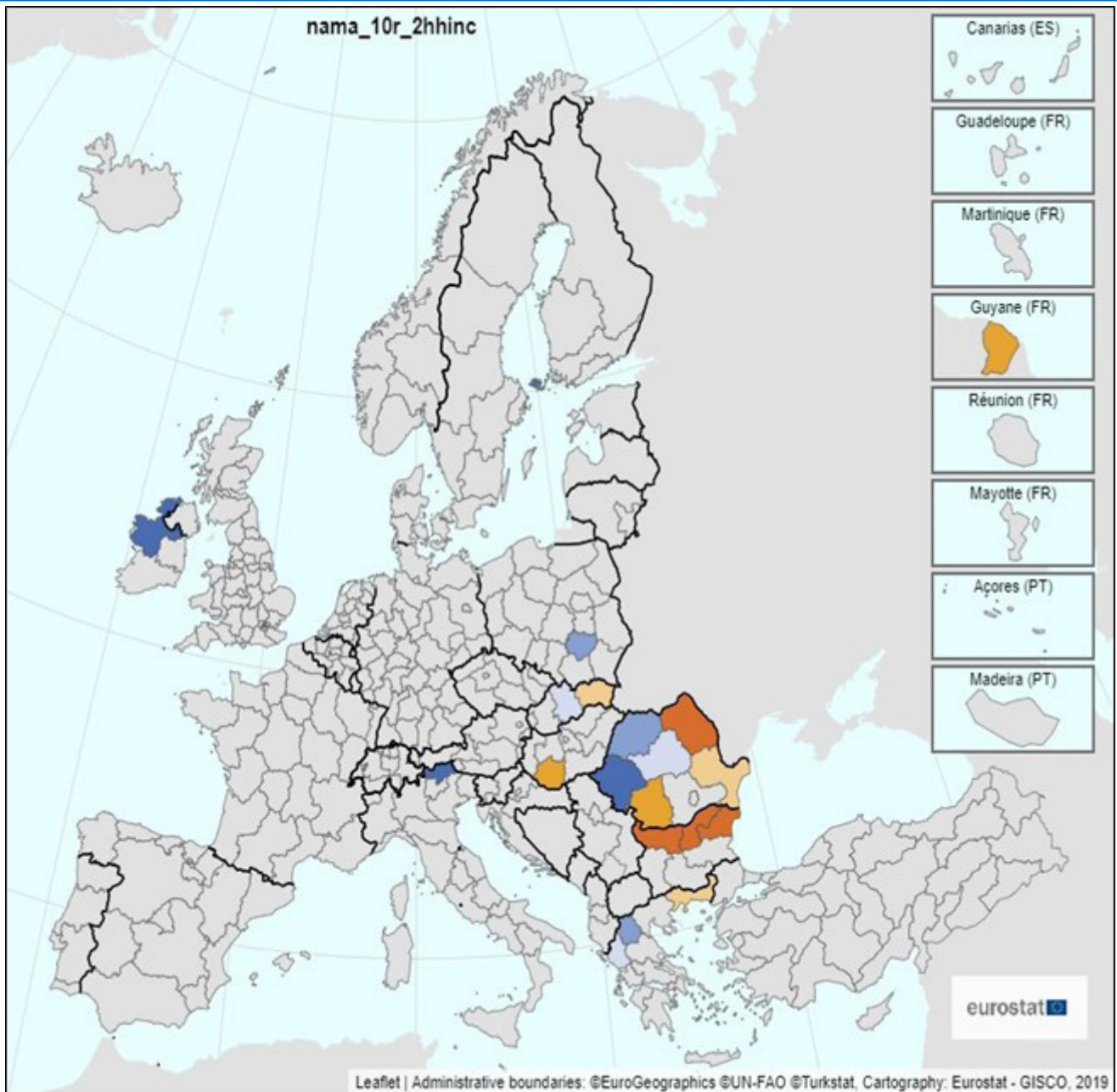
⁵³ <https://www.eib.org/en/projects/topics/regional-development/index>

Figure 3: Index scores of the NUTS 2 Regions of Ireland in the European Commission’s 2022 “Regional Competitiveness Index”, (Blue line = EU27 average)



Source: European Commission

Figure 4: The 20 NUTS 2 Regions in the EU27 with the lowest “Infrastructure” ranking in the European Commission’s “Regional Competitiveness Index”



Source: Northern and Western Regional Assembly using interactive map from Eurostat. Colours of regions are only for design purpose and do not indicate ranking of “Infrastructure” index score. “Infrastructure” index scores of these 20 NUTS 2 Regions available via Table 2

Table 2: The 20 NUTS 2 Regions in the EU27 with the lowest “infrastructure” ranking in the European Commission’s “Regional Competitiveness Index”, by their development stage and index score, 2022.

NUTS 2 Region	Member State	Development Stage	Infrastructure Ranking (out of 234 NUTS 2 Regions)	Infrastructure Index Score (2022) (100 = EU27 average)
Sud-Est	Romania	Less Developed Region	215 th	36.0
Dél-Dunántúl	Hungary	Less Developed Region	216 th	35.1
Prov. Autonoma di Bolzano/Bozen	Italy	More Developed Region	217 th	34.8
Northern and Western	Ireland	Transition Region	218th	34.1
Anatoliki Makedonia, Thraki	Greece	Less Developed Region	219 th	34.0
Vest	Romania	Less Developed Region	220 th	33.5
Východné Slovensko	Slovakia	Less Developed Region	221 st	32.6
Severoiztochen	Bulgaria	Less Developed Region	222 nd	32.5
Nord-Est	Romania	Less Developed Region	223 rd	31.8
Åland	Finland	More Developed Region	224 th	30.0
Świętokrzyskie	Poland	Less Developed Region	225 th	30.0
Severen tsentralen	Bulgaria	Less Developed Region	226 th	28.0
Guyane	France	Less Developed Region	227 th	27.0
Stredné Slovensko	Slovakia	Less Developed Region	228 th	26.9
Sud-Vest Oltenia	Romania	Less Developed Region	229 th	26.7
Centru	Romania	Less Developed Region	230 th	24.8
Dytiki Makedonia	Greece	Less Developed Region	231 st	22.9
Nord-Vest	Romania	Less Developed Region	232 nd	21.7
Severozapaden	Bulgaria	Less Developed Region	233 rd	19.8
Ipeiros	Greece	Less Developed Region	234 th	19.5

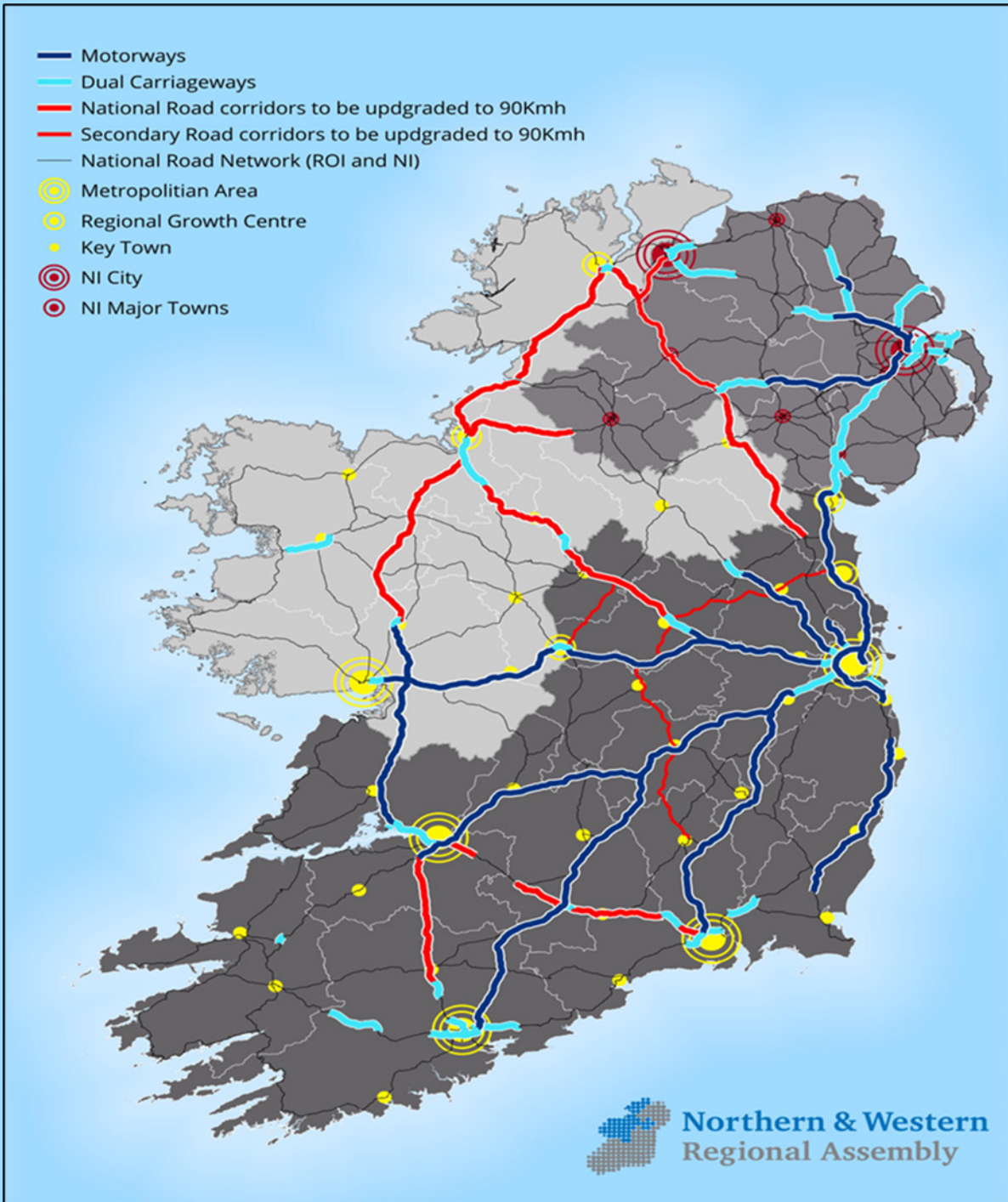
Source: Northern and Western Regional Assembly using data from the European Commission’s “Regional Competitiveness Index”

Based on the results from the European Commission’s “Regional Competitiveness Index”, it is clear that the transport infrastructure deficits in the Northern and Western Region of Ireland are quite substantial in comparison to Irish and European norms. The primary cause of these infrastructure deficits is the lack of public investment in the region’s infrastructure assets, with underinvestment particularly evident since the base year of the NPF, as documented in Section 3 of this publication. Figures 5 and 6 also provide a sense of this underinvestment from a visual perspective, with Figure 5 showing that the Northern and Western Region of Ireland has a high proportion of national primary roads that are still to be upgraded while also having very little of a motorway network, with these deficits particularly evident in the North-West City Region. Likewise, Figure 6 shows that the Northern and Western Region of Ireland is notably underserved in terms of the provision of rail infrastructure, with no direct rail connectivity between the Galway Metropolitan Area, the Regional Growth Centres of Sligo Town and Letterkenny as well as Derry City.

This underinvestment – and the resultant infrastructure deficits – are undermining the delivery of a wide range of “National Strategic Outcomes” (NSO) in the National Planning Framework, including “NSO 2: Regional Accessibility”, “NSO 4: Sustainable Mobility”, “NSO 6: High-Quality International Connectivity” and “NSO 8: Transition to a Low Carbon and Climate Resilient Society”. Furthermore, the scale of these transport infrastructure deficits are also undermining the delivery of the following “National Policy Objectives” (NPO):

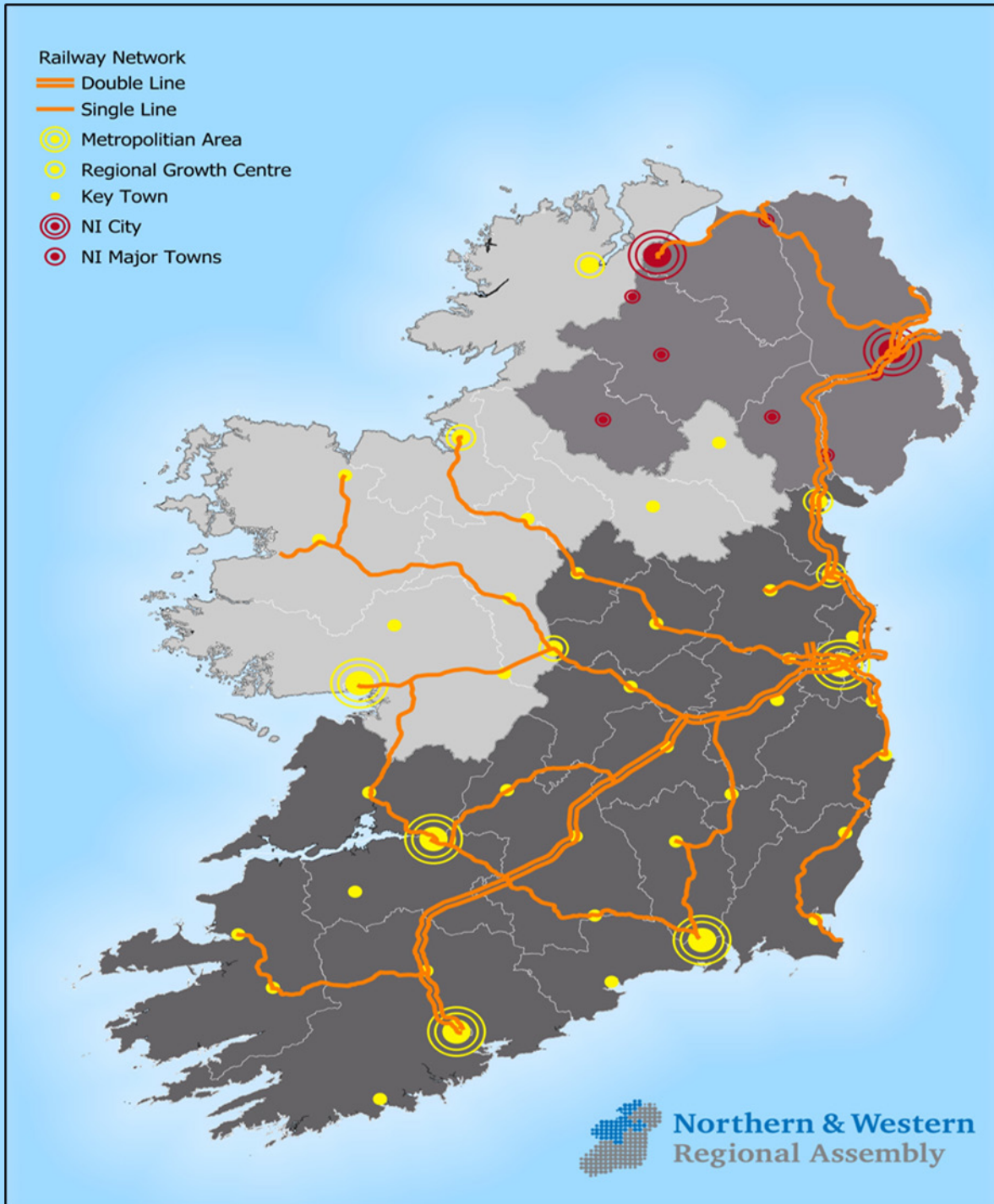
- NPO 2c: Accessibility from the north-west of Ireland and between centres of scale separate from Dublin will be significantly improved, focused on cities and larger regionally distributed centres and on key east-west and north-south routes.
- NPO 5: Develop cities and towns of sufficient scale and quality to compete internationally and to be drivers of national and regional growth, investment and prosperity.
- NPO 7 which – amongst other things – aims to strengthen Ireland’s overall urban structure, particularly in the Northern and Western and Midland Regions, with a particular focus on “the regional centres of Sligo and Letterkenny in the North-West, Athlone in the Midlands and cross-border networks focused on the Letterkenny-Derry North-West Gateway Initiative and Drogheda-Dundalk-Newry on the Dublin-Belfast corridor”
- NPO 45: In co-operation with relevant Departments in Northern Ireland, support and promote the development of the North West City Region as interlinked areas of strategic importance in the North-West of Ireland, through collaborative structures and a joined-up approach to spatial planning.
- NPO 46: In co-operation with relevant Departments in Northern Ireland, enhanced transport connectivity between Ireland and Northern Ireland, to include cross-border road and rail, cycling and walking routes, as well as blueways, greenways and peatways.
- NPO 54: Reduce our carbon footprint by integrating climate action into the planning system in support of national targets for climate policy mitigation and adaptation objectives, as well as targets for greenhouse gas emissions reductions

Figure 5: Road network of the island of Ireland, by type of roads and upgrades



Source: Northern and Western Regional Assembly based on TII Data

Figure 6: Rail network on the island of Ireland, by double and single line tracks



Source: Northern and Western Regional Assembly

4.2: Health Infrastructure Deficits

Although the provision of health infrastructure is quite wide ranging, one of the most significant challenges being experienced by the Irish health system – from an infrastructure perspective – has been overcrowding in Emergency Departments (EDs). Overcrowding in EDs is an issue affecting all NUTS 2 Regions across Ireland, with the latest “National Patient Experience Survey”⁵⁴ providing some sense the scale of these challenges in the Northern and Western Region of Ireland.

It is important to note that the “National Patient Experience Survey” is a nationwide survey that asks people for feedback about their stay in hospitals across the State. The survey is a partnership between the Health Information and Quality Authority (HIQA), the Health Service Executive (HSE) and the Department of Health, and evaluates patient’s experiences across a variety of areas including:

- ◆ Admissions to Hospitals,
- ◆ Care on the ward,
- ◆ Examinations, diagnosis and treatment,
- ◆ Discharge or transfer.

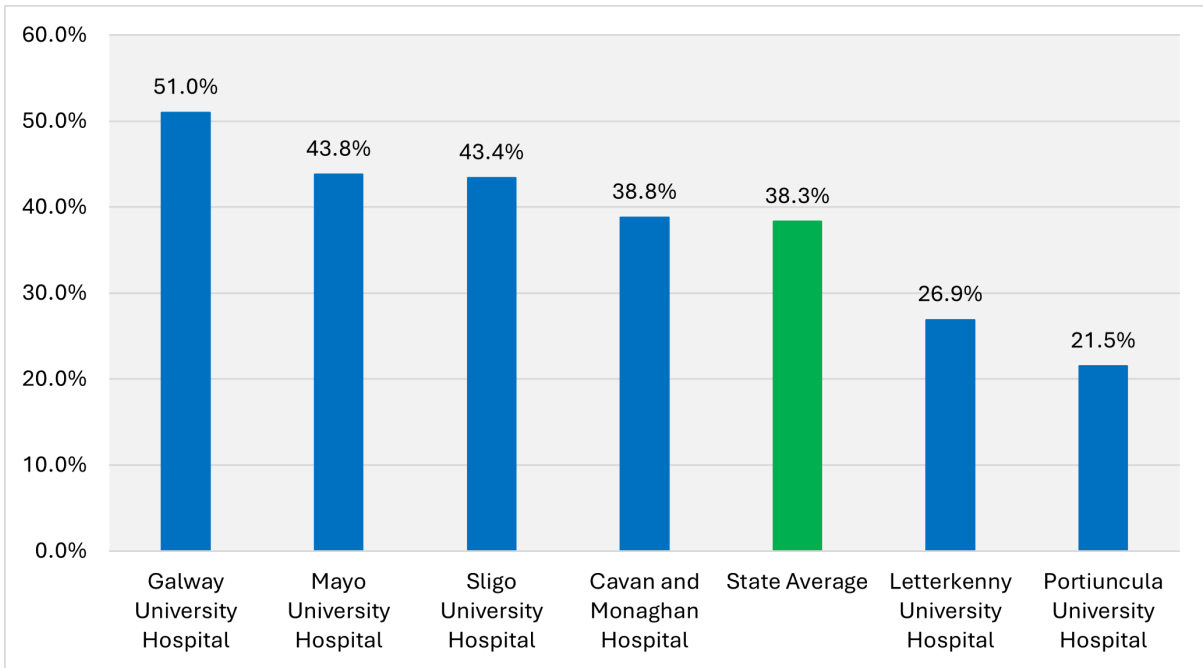
In 2022, 51 per cent of ED attendees in Galway University Hospital had to wait more than 12 hours to be either admitted to a ward or discharged, which was notably higher compared to the State average of 38.3 per cent. This was followed by Mayo University Hospital at 43.8 per cent, Sligo University Hospital at 43.4 per cent and Cavan and Monaghan Hospital at 38.8 per cent. As evident from Figure 7, 26.9 per cent of ED attendees in Letterkenny University Hospital had to wait more than 12 hours to be either admitted to a ward or discharged, with the corresponding ratio for attendees at Portlinculla University Hospital being 21.5%.

Furthermore, in 2022, 26.6 per cent of ED attendees in Mayo University Hospital were admitted to a ward within 6 hours, which was below the State average of 28.9 per cent and was notably lower compared to the HSE’s stated target of 70 per cent of attendees should be admitted or discharged within 6 hours. Similarly, below average performances were also registered for Galway University Hospital and Sligo University Hospital, with only 26.6 per cent and 27.1 per cent of patients waiting to be either admitted or discharged within 6 hours respectively. The findings from the National Patient Experience Survey in terms of the region’s ED waiting times seem to be broadly aligned with findings from separate HSE data on average waiting times by ED.⁵⁵ Such deficits are affecting the delivery of “National Strategic Outcome 10” in the National Planning Framework (NPF) which seeks to improve access to quality health services.

⁵⁴ <https://yourexperience.ie/inpatient/national-results/>

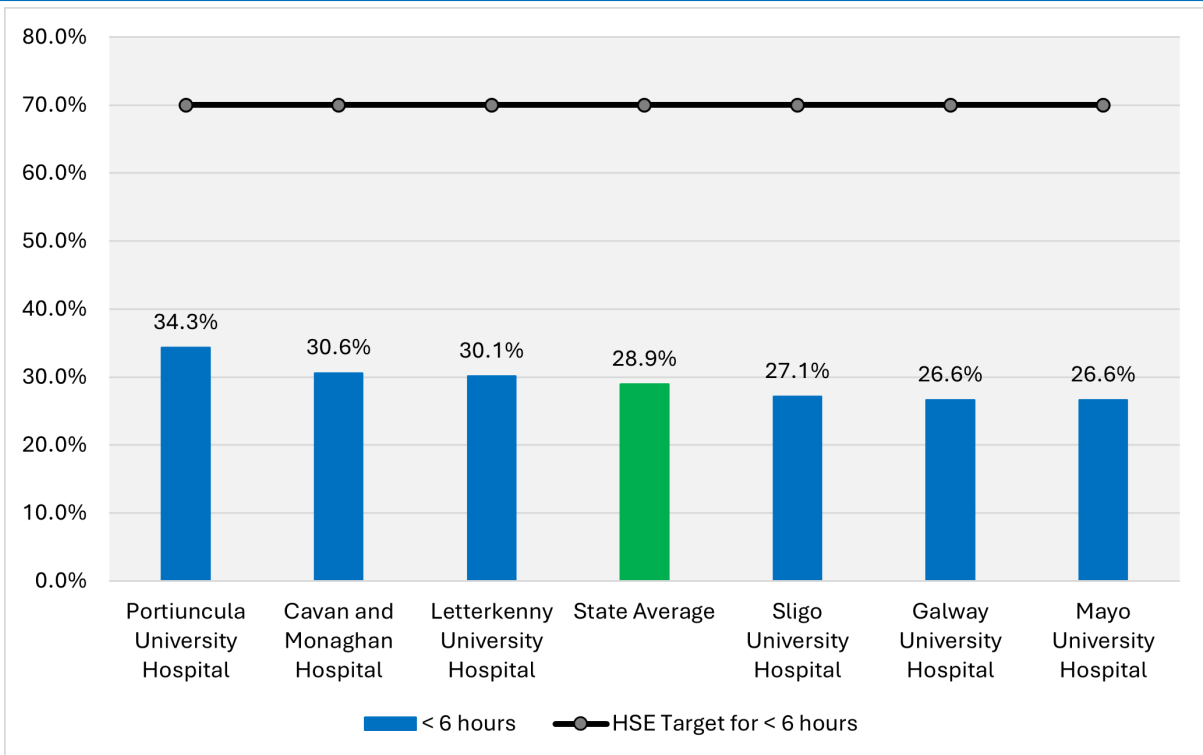
⁵⁵ <https://www.irishtimes.com/news/health/emergency-department-delays-worst-on-record-with-seriously-ill-waiting-13-hours-for-admission-1.4875046>

Figure 7: Percentage of ED attendees that had to wait more than 12 hours to be either admitted to a ward or discharged, by hospital, 2022



Source: National Patients Experience Survey

Figure 8: Percentage of ED attendees that had to wait less than 6 hours to be either admitted to a ward or discharged, by hospital (2022) vs HSE's stated target of 70% of patients to be admitted or discharged within 6 hours



Source: National Patients Experience Survey

4.3: Social Housing Infrastructure Deficits

Another consequence of legacy underinvestment in the Northern and Western Region of Ireland is evident from the region's deficits with respect to provision of new public housing units, with social housing acting as one of the key infrastructure assets of Local Authorities. Although social housing is not an infrastructure asset in a traditional sense, it shares similarities with many other forms of social infrastructure – serving societal and economic needs – with legacy underinvestment from central government having a direct impact on the availability of social housing units to residents in the Northern and Western Region of Ireland.

With this in mind, the sole focus of this sub-section will be analysing the provision of new social housing units across the Northern and Western Region of Ireland and will not include any analysis of the regional distribution of total new dwellings completions, which would include private housing developments. It should be noted that the Assembly has analysed the regional distribution of total new dwelling completions in Ireland in a separate “Regional Economic Briefing Note”.⁵⁶ As per the definitions used by the Department of Housing, Local Government and Heritage,⁵⁷ this sub-section will focus on the data related total social housing output – which includes “New Builds” – which would consist of new builds from Local Authorities, Approved Housing Bodies and Part V developments – as well as units delivered through “Acquisitions” and “Leasing” arrangements.

Considering the nature of the “Regional Infrastructure Tracker” – which seeks to examine investments made in infrastructure – this sub-section will also specifically examine the number of social housing units delivered through “New Builds”. Under the definition used by the Department of Housing, Local Government and Heritage, the provision of social housing under “New Builds” would include units delivered through rapid builds, traditional builds, turnkey, public-private-partnerships (PPPs), regeneration and traveller accommodation. In the Department's datasets for the years 2016 to 2019, “Voids” were counted under the category of “Total – New Builds”, with data in this regard being presented separately for the years beyond 2019. To allow for appropriate comparisons in this sub-section, the data related to “Voids” has been removed from the 2016 to 2019 figures.

Notwithstanding the role of acquisitions and leasing in terms of growing the social housing stock, additions through these types of mechanisms will not be the predominant focus of this sub-section. This is primarily due to the nature of these mechanisms, with acquisitions associated with displacement in the wider housing market⁵⁸ while lease agreements by definition are not associated with full public ownership of social housing units, as the use of the asset is leased for a defined period of time and ownership ultimately resides with private individuals.

In 2023, there were 11,939 social housing units delivered in Ireland, with these units being delivered via new-builds, acquisitions and leasing arrangements. Of this, 8,110 was delivered via new-builds – which would include new builds from Local Authorities, Approved Housing Bodies and Part V developments – 1,830 were delivered from acquisitions, while 1,999 were delivered from leasing arrangements. Of the 11,939 social housing units delivered in Ireland in 2023, only 1,143 units or 9.6 per cent were located in the Northern and Western Region of Ireland, which was notably below the region's share of Ireland's population as per the latest Census – which was 17.6 per cent in 2022 – and lower than the region's estimated share of Ireland's population as of 2023,⁵⁹ which was 17.7 per cent.

For each year between 2016 – which represents the base year of the National Planning Framework (NPF) – and 2023, the Northern and Western Region's share of total social housing output was below its estimated share of Ireland's population, highlighting the relative lack of provision of social housing on a per capita basis, as evident from Figure 9. During this time period, the region's share of total social housing output was at its highest in 2016, accounting for 13.4 per cent of output in Ireland, albeit it was still below the region's share of Ireland's population as of Census 2016 – which was 17.8 per cent – and below the CSO's separate annual population estimate for 2016, which was 17.7 per cent.

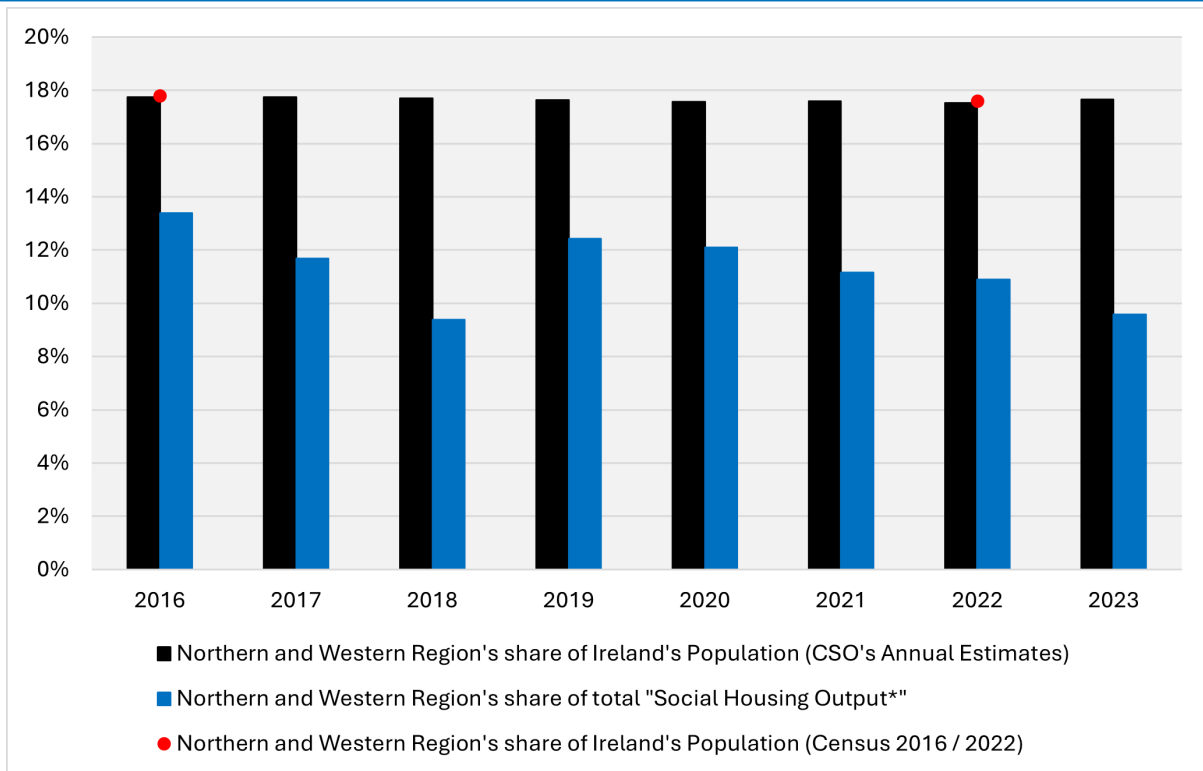
⁵⁶ <https://www.nwra.ie/wp-content/uploads/2024/02/regional-economic-briefing-note-february-2024.pdf>

⁵⁷ <https://www.gov.ie/ga/bailiuchan/6060e-overall-social-housing-provision/#social-housing-current-expenditure-programme-shcep>

⁵⁸ Budget 2022 Analysis of Social Housing Acquisitions, Henry Griffin, Housing, Local Government and Heritage Vote Department of Public Expenditure and Reform

⁵⁹ <https://data.cso.ie/table/PEA04>

Figure 9: The Northern and Western Region's share of "total social housing output*" in Ireland, vs the region's share of Ireland's population, 2016-2023



Source: Department of Housing, Local Government and Heritage. *Includes units delivered through new builds, acquisitions and leasing arrangements.

That said, it is important to acknowledge that total social housing output in this regard includes units which have been provided through acquisitions and leasing arrangements. Given that the focus of this publication is to examine the provision of infrastructure through public investments – and considering the nature of leasing arrangements and acquisitions – it was important that this sub-section specifically focused on “New – Builds”, which would be a sub-set of total social housing output. In this regard, “New – Builds” would include “Local Authority – New Builds”, “Approved Housing Bodies (AHBs) – New Builds” and “Part V – New Builds”.

Of the 1,143 social housing units delivered in the Northern and Western Region of Ireland in 2023, 861 or 75 per cent were classified as new builds. Of the 861 new builds that were delivered in the Northern and Western Region of Ireland in 2023, 407 were delivered by the Local Authorities, with 340 delivered by Approved Housing Bodies, with the remaining 114 delivered through Part V developments.

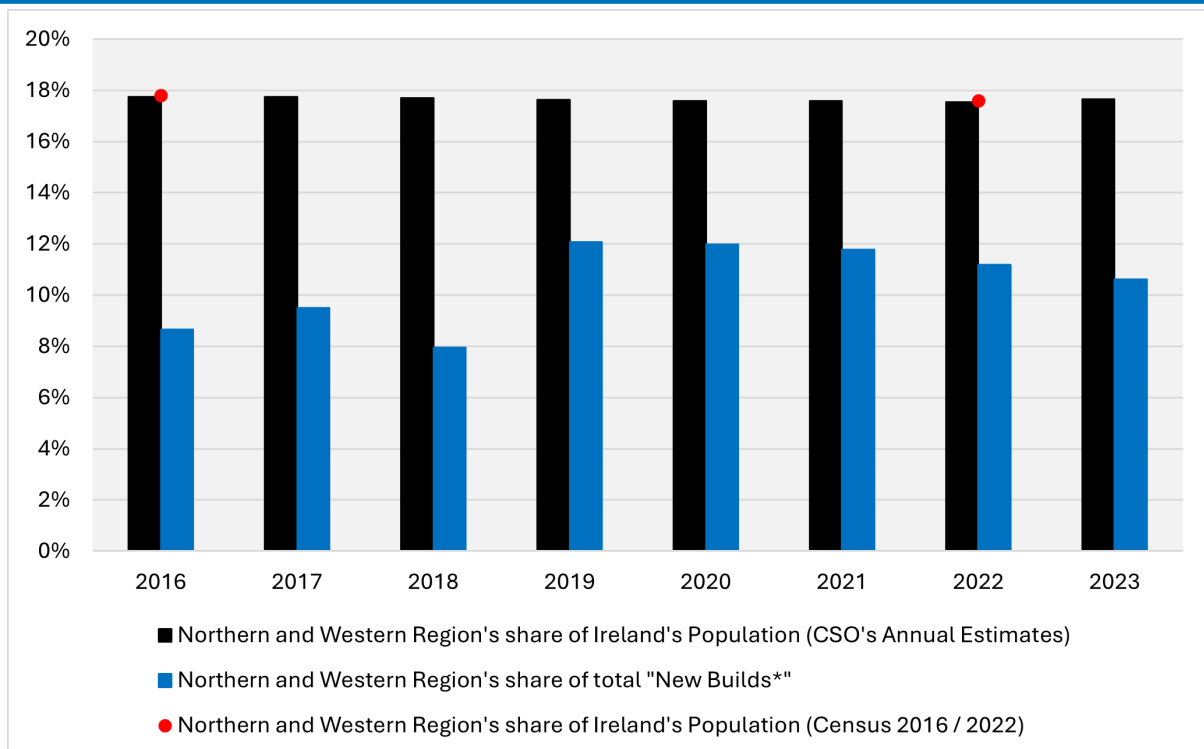
Of the 8,110 “new builds” delivered in Ireland in 2023, only 861 units or 10.6 per cent were located in the Northern and Western Region of Ireland, which was notably below the region's share of Ireland's population as per the latest Census – which was 17.6 per cent in 2022 – and lower than the region's estimated share of Ireland's population as of 2023,⁶⁰ which was 17.7 per cent. Similar to total social housing output, there has been below average allocations of “New Builds” in terms of social housing, with the Northern and Western Region of Ireland receiving below average allocations in every year since 2016, as evident from Figure 10.

⁶⁰ <https://data.cso.ie/table/PEA04>

Table 3: Total number of “New Builds” by the Local Authorities of the Northern and Western Region of Ireland, by delivery category, 2023

	Local Authority New Builds	Approved Housing Bodies New Builds	Part V - New Builds	Total New Builds
Cavan County Council	27	8	2	37
Donegal County Council	28	32	21	81
Galway City Council	37	115	29	181
Galway County Council	107	94	25	226
Leitrim County Council	28	0	0	28
Mayo County Council	55	0	6	61
Monaghan County Council	20	50	6	76
Roscommon County Council	28	28	11	67
Sligo County Council	77	13	14	104
Northern and Western Region of Ireland	407	340	114	861

Source: Department of Housing, Local Government and Heritage

Figure 10: The Northern and Western Region’s share of total “New builds” in Ireland, vs the region’s share of Ireland’s population, 2016-2023

Source: Department of Housing, Local Government and Heritage.

In conjunction to this, the delivery of social housing units in the Northern and Western Region of Ireland – in absolute terms – is particularly low when compared to the latest number of households which are qualified for social housing support – but whose needs are currently not being met – as evident from Table 4. The “Summary of Social Housing Assessments for 2023”⁶¹ brings together information provided by local authorities on households in their functional area that are qualified for social housing support but whose social housing need is not currently being met. It is a point-in-time assessment of the identified need for social housing support across the country.

To be counted on this list, households must be qualified for social housing support. Households currently living in local authority rented accommodation, approved housing body accommodation, accommodation provided under the Housing Assistance Payment (HAP) scheme, accommodation provided under the Rental Accommodation Scheme (RAS), accommodation provided under the Social Housing Capital Expenditure Programme (SHCEP) schemes or any household on a transfer list are not included in these figures.

As evident from Table 4, the total number of households that were on the waiting list for social housing supports from the Local Authorities of the Northern and Western Region of Ireland amounted to 6,950, which was considerably higher compared to the total level of social housing output (1,143 units) in the region. Of the Local Authorities in the Northern and Western Region of Ireland, Galway City Council had the highest number of applicants qualified for social housing support in the region, with 1,694 households on the waiting list. Despite this, total social housing output in the Galway City Council area amounted to 239 in 2023, of which 181 were “new builds” which were either provided by the Local Authority, an Approved Housing Body or provided through Part V arrangements. Similar gaps between the need for social housing and the provision of this important infrastructure asset are evident across the other Local Authorities in the Northern and Western Region of Ireland, with such underinvestment leading to significant implications for the wider housing market.

Notwithstanding the fact that deficits in the supply of social housing is evident across all of the NUTS 2 Regions of Ireland, such figures show that – for each year between 2016 and 2023 – the Northern and Western Region of Ireland has been allocated below average levels of social housing compared to its share of Ireland’s population. Furthermore – as per the latest full year of 2023 – the provision of social housing in the region was far too low compared to the number of households that are qualified for social housing supports within the region. Such trends reflect another element of the legacy of underinvestment in the infrastructure assets of the Northern and Western Region of Ireland, with underinvestment in this regard having far reaching consequences on the region’s wider housing market, whether it be greater pressure on homeless services or increased demand and displacement in a underserved private rental sector, through the use of HAP or RAS as an alternative to traditional social housing output. Furthermore, these deficits undermining the delivery of “National Strategic Outcome 1” (NSO) in the National Planning Framework (NPF), which seeks to support compact growth across our cities, towns and villages.

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<https://www.gov.ie/en/publication/0dad4-summary-of-social-housing-assessments-2023-key-findings/>

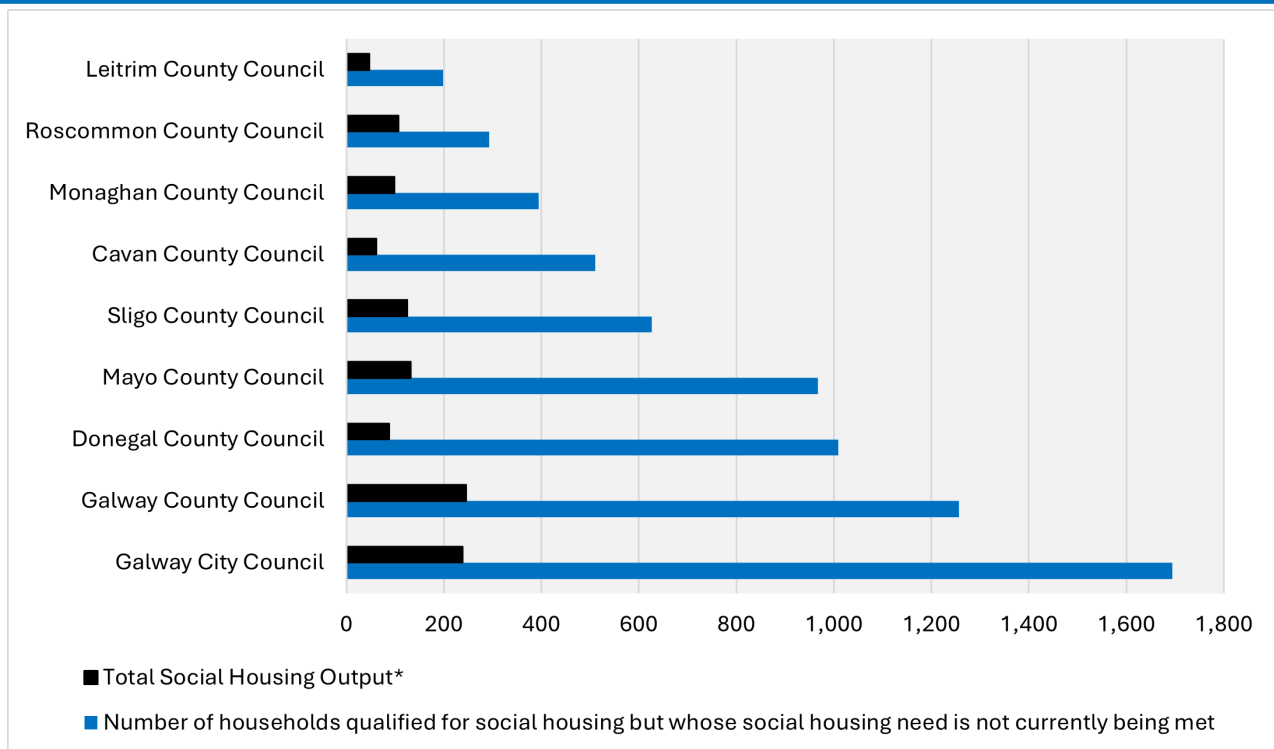


Table 4: Number of households qualified for social housing but whose social housing need is not currently being met vs total social housing output, by the Local Authorities of the Northern and Western Region of Ireland, 2023

	Number of households qualified for social housing in 2023	Total Social Housing Output* in 2023	Total "New Builds"***
Galway City Council	1,694	239	181
Galway County Council	1,257	246	226
Donegal County Council	1,009	88	81
Mayo County Council	967	132	61
Sligo County Council	626	125	104
Cavan County Council	511	61	37
Monaghan County Council	395	98	76
Roscommon County Council	293	107	67
Leitrim County Council	198	47	28
Northern and Western Region of Ireland	6,950	1,143	861

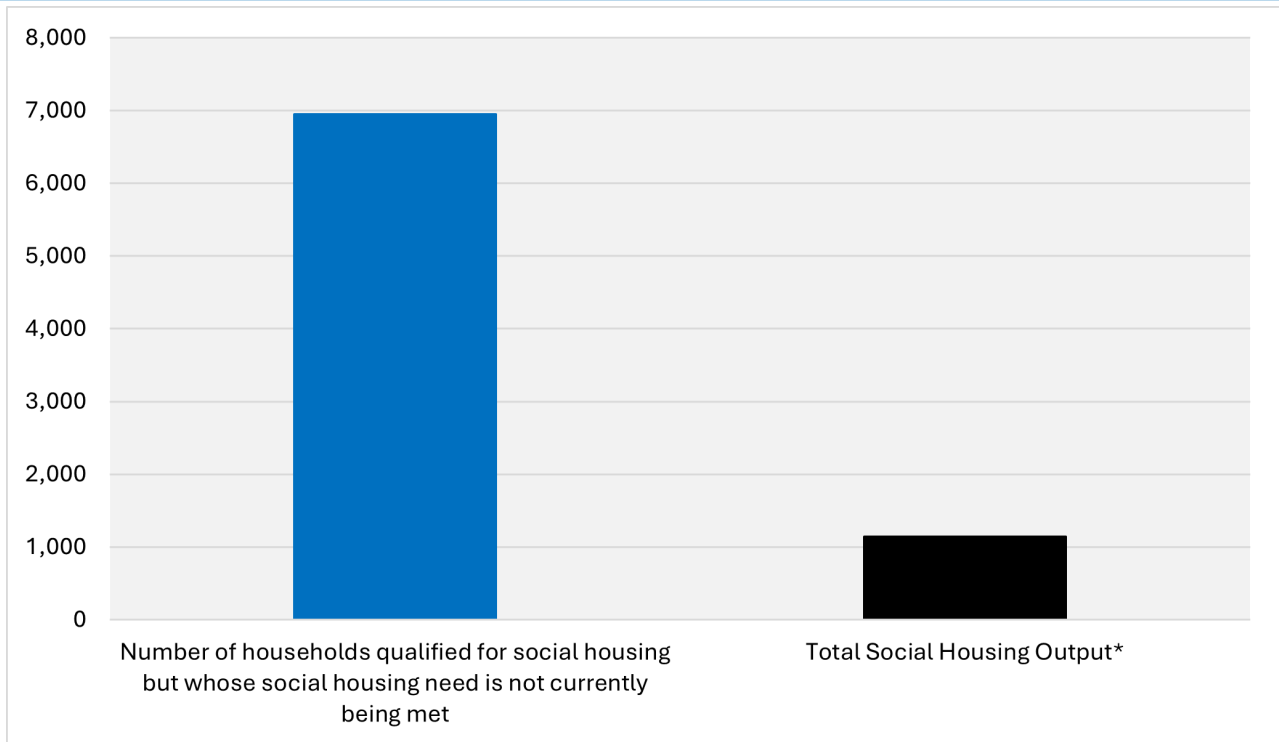
Source: Department of Housing, Local Government and Heritage. *includes units provided through new builds, acquisitions and leasing arrangements. **sub-set of total social housing output and specifically shows new builds provided through local authorities, approved housing bodies and Part V.

Figure 11: Number of households qualified for social housing but whose social housing need is not currently being met vs total social housing output, by the Local Authorities of the Northern and Western Region of Ireland, 2023



Source: Department of Housing, Local Government and Heritage. *includes units provided through new builds, acquisitions and leasing arrangements.

Figure 12: Number of households qualified for social housing but whose social housing need is not currently being met vs total social housing output, in the Northern and Western Region of Ireland, 2023



Source: Department of Housing, Local Government and Heritage. *includes units provided through new builds, acquisitions and leasing arrangements.

4.4: Research Infrastructure Deficits

In addition to experiencing underinvestment in traditional forms of infrastructure, the Northern and Western Region of Ireland has also been underserved in the provision of modern forms of infrastructure such as research centres. For example, this is particularly evident when examining the regional distribution of Science Foundation Ireland (SFI) research centres across Ireland, with these research centres acting as significant research assets for the areas in which they are located, supporting research and development and developing partnerships between academia and industry.

As evident from Table 5, only 2 of the 16 SFI Research Centres in Ireland are located in the Northern and Western Region of Ireland – namely INSIGHTS and CURAM – with both of these research centres located in Galway. Outside of Galway, there is currently no SFI research centres located in the Northern and Western Region of Ireland. In contrast, 7 SFI research centres are located in the Southern Region and in the Eastern and Midland Region of Ireland.

Although SFI research centres located outside of the Northern and Western Region partner with higher education institutes such as the University of Galway and the Atlantic Technological University, the absence of this type of research infrastructure undermines the ability of the region to attract high-valued investment, jobs and research funding, affecting its ability to provide a credible counterbalance to the Greater Dublin Area. These type of infrastructure deficits are undermining the delivery of “National Strategic Outcome 5” in the National Planning Framework (NPF) which seeks to support a strong economy through enterprise, innovation and skills, while also affecting the implementation of the following “National Policy Objectives”, namely:

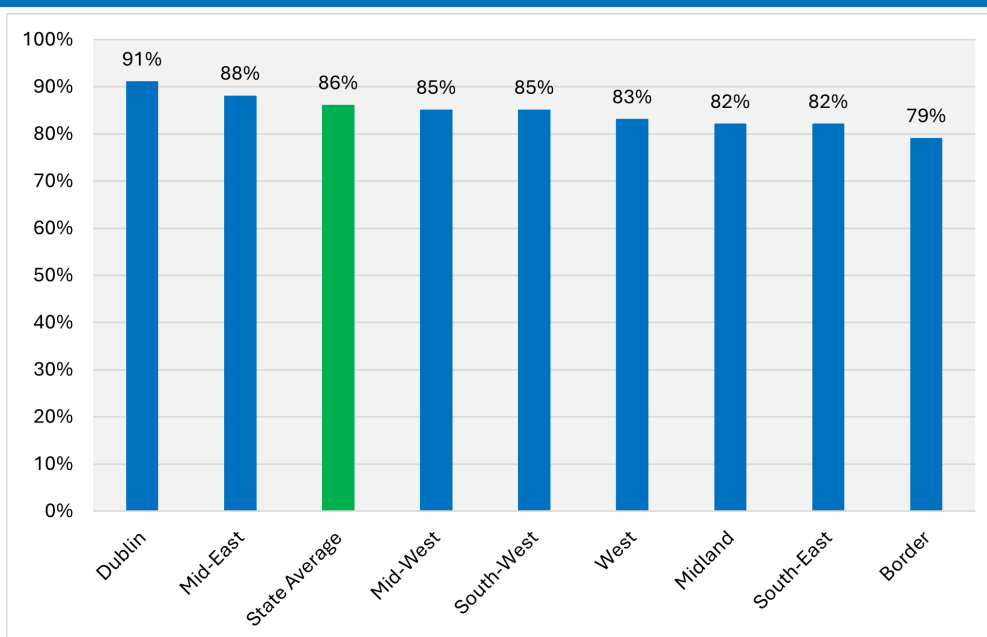
- NPO 5: Develop cities and towns of sufficient scale and quality to compete internationally and to be drivers of national and regional growth, investment and prosperity.
- NPO 7 which – amongst other things – aims to strengthen Ireland’s overall urban structure, particularly in the Northern and Western and Midland Regions, with a particular focus on “the regional centres of Sligo and Letterkenny in the North-West, Athlone in the Midlands and cross-border networks focused on the Letterkenny-Derry North-West Gateway Initiative and Drogheda-Dundalk-Newry on the Dublin-Belfast corridor”

Table 5: SFI Research Centres, by high-level focus of research and predominant geographical location

SFI Research Centre	Focus of SFI Research Centre	Primary County Location	Primary NUTS 2 Region Location
VistaMilk	Agri-Food and ICT	Cork	Southern Region
FutureNeuro	Chronic and Rare Neurological Diseases	Dublin	Eastern and Midland Region
I-Form	Advanced Manufacturing and Technology	Dublin	Eastern and Midland Region
CONFIRM	Smart Manufacturing	Limerick	Southern Region
BiOrbic	Bioeconomy	Dublin	Eastern and Midland Region
Insight	Data Analytics	Galway	Northern and Western Region
iCrag	Applied Geosciences	Dublin	Eastern and Midland Region
SSPC	Pharmaceuticals	Limerick	Southern Region
MaREI	Energy, Climate and Marine	Cork	Southern Region
Lero	Software	Limerick	Southern Region
IPIC	Photonics	Cork	Southern Region
CURAM	Medical Devices	Galway	Northern and Western Region
CONNECT	Future Networks and Communications	Dublin	Eastern and Midland Region
APC	Microbiome	Cork	Southern Region
ADAPT	AI-driven Digital Content Technology	Dublin	Eastern and Midland Region
AMBER	Advanced Materials and BioEngineering	Dublin	Eastern and Midland Region

Source: SFI⁶²

Figure 13: Fixed Broadband Connectivity Rates, by the NUTS 3 Region of Ireland, 2023



Source: CSO, Information and Society Report

⁶² <https://www.sfi.ie/sfi-research-centres/>

4.5: Digital Infrastructure Deficits

There is a significant positive relationship between broadband investment and economic development. According to research by the ESRI,⁶³ the provision of broadband infrastructure seems to attract almost all types of enterprises, while the appeal of a geographical area for high-tech firms is also boosted by the availability of high-speed broadband infrastructure. In addition to economic benefits, the provision of high-speed broadband across regions opens up a wide range of social opportunities, allowing communities to connect in ways that would be impossible without such digital infrastructure, opening up e-learning activities, enhancing the provision of public services and supporting remote working opportunities.

Of the 3 NUTS 2 Regions of Ireland, households in the Northern and Western Region of Ireland had the lowest level of access to fixed broadband, with only 81 per cent of households having a fixed broadband connection in 2023, below the State average of 86 per cent.⁶⁴ This information is also available for the 8 NUTS 3 Regions of Ireland. Of the 8 NUTS 3 Regions of Ireland, households in the Border had the lowest level of access to fixed broadband, with only 79 per cent of households having a fixed broadband connection in 2023, below the State average of 86 per cent.⁶⁵ As can be seen from Figure 13, access to a fixed broadband connection varied on a NUTS 3 Regional level, with 91 per cent of households in Dublin having a fixed broadband connection, followed by the Mid-East (88%), the South-West (85%) and the Mid-West (85%). The NUTS 3 Regions with the next lowest connectivity rates was the West (83%), followed by the Midlands (82%) and the South-East (82%). Infrastructure deficits in terms of broadband will undermine the delivery of "National Strategic Outcome 3" which aims to - amongst other things - strengthen rural economies and communities through the delivery of broadband services. In addition to this, the relative lack of broadband services in the Northern and Western Region of Ireland also prevents progress in delivering on the following "National Policy Objectives" (NPO), namely:

- NPO 14: Protect and promote the sense of place and culture and the quality, character and distinctiveness of the Irish rural landscape that make Ireland's rural areas authentic and attractive as places to live, work and visit.
- NPO 21: Enhance the competitiveness of rural areas by supporting innovation in rural economic development and enterprise through the diversification of the rural economy into new sectors and services, including ICT based industries and those addressing climate change and sustainability.
- NPO 24: Support and facilitate delivery of the National Broadband Plan as a means of developing further opportunities for enterprise, employment, education, innovation and skills development for those who live and work in rural areas.

It is important to note - as stated by the ESRI research⁶⁶ - investing in broadband infrastructure isn't enough to encourage economic and social development unless the regions are endowed with adequate levels of human capital and innovation. The ESRI note that only geographical areas with enough highly skilled staff seem to enjoy a boost in start-ups when they have broadband network access; a finding which is consistent with international research. Hence, for regions with relatively lower levels of human capital, a more appropriate approach would be to complement the investment in broadband with measures to improve human capital levels.

⁶³ <https://www.esri.ie/system/files/media/file-uploads/2018-03/RB201805.pdf>

⁶⁴ <https://www.cso.ie/en/releasesandpublications/ep/p-isshh/informationstistics-households2019/householdinternetconnectivity/>

⁶⁵ <https://www.cso.ie/en/releasesandpublications/ep/p-isshh/informationstistics-households2019/householdinternetconnectivity/>

⁶⁶ <https://www.esri.ie/system/files/media/file-uploads/2018-03/RB201805.pdf>

4.6: Water Infrastructure Deficits

The provision of high-quality surface water and wastewater infrastructure will be key to delivering on the population targets of the National Planning Framework (NPF) and the Regional Spatial and Economic Strategy (RSES) of the Northern and Western Region of Ireland, while maintaining high environmental standards in our region's ecosystem, as per the vision of the Climate Action Plan. Despite this, it is clear that insufficient investment has been made in these infrastructure assets within the Northern and Western Region of Ireland, with considerable deficits evident across the network in recent times.

The scale of these deficits was evident from Uisce Éireann's latest "10 Year Water Supply Capacity Register", which was provided to the Northern and Western Regional Assembly by Uisce Éireann on the 30th of June 2023. The next version of this register is expected to be released after the publication of the "Regional Infrastructure Tracker", therefore the information presented in this sub-section represents the most up-to-date dataset at the time of writing of this publication. The water supply capacity register indicates the capacity required to meet planned population growth across the settlements of the Northern and Western Region of Ireland up to 2032. The degree to which the region's network has capacity available to support the 2032 population targets are presented under the following categories by Uisce Éireann, namely:

- ◇ **Capacity available:** Capacity available to meet 2032 population targets.
- ◇ **Capacity available – level of service improvement required:** If a settlement is included in this category, then it was found that it has capacity available to meet 2032 population targets but an improvement in the "Level of Service" is required. "Level of Service" refers to the reliability of the supply that customers can expect to receive and is expressed as a frequency or return period of supply failure. For example, if the "Level of Service" is stated as 1 in 50 – as a consumer – you would only ever expect to experience a water outage or severe limitations to your supply – on average – once every 50 years. Leakage reduction and / or capital investment will be required to maintain or improve "Levels of Service" as demand increases.
- ◇ **Potential capacity available – level of service improvement required:** Capacity constraints exist in the settlements that are included in this category and connection applications will be assessed on an individual basis considering their specific demand requirements. A "Level of Service" improvement is required to meet 2032 population targets. Improvement proposals may include – but are not limited to – leakage reduction and/or capital investment. These proposals will be required to maintain and improve "Levels of Service" as demand increases.
- ◇ **Capital investment required:** Capacity not available to meet 2032 population targets, therefore capital investment required

As evident from Table 6, 39.1 per cent of the settlements in the Northern and Western Region of Ireland have capacity to meet their population targets up to 2032 and not require any "Level of Service" improvement. Notably, Monaghan recorded the highest percentage of settlements with capacity available to meet their 2032 population targets – at 88.2 per cent – followed by Roscommon at 76 per cent, Cavan at 68.4 per cent and Sligo at 68.2 per cent. Notably, Mayo – at 13.8 per cent – had the lowest percentage of settlements that had capacity to meet their population targets up to 2032 and not require any level of service improvement, followed by Donegal at 17.7 per cent, Galway County at 20.9 per cent and Leitrim at 33.3 per cent.

The remaining settlements in the Northern and Western Region of Ireland – to some extent – require capital investment to address capacity constraints or to deliver "Level of Service" improvements to meet their population targets up to 2032, suggesting some form of infrastructure deficits exist within these settlement's surface water network in meeting future population targets. Of the counties of the Northern and Western Region of Ireland, Mayo recorded the highest percentage of settlements with some kind of capacity constraints in meeting their 2032 population targets – at 86.2 per cent – followed by Donegal at 82.3 per cent, Galway County at 79.1 per cent and Leitrim at 66.7 per cent. Notably, Monaghan – at 11.8 per cent – had the lowest percentage of settlements that had some form of capacity constraints, followed by Roscommon at 24 per cent and Sligo at 31.8 per cent. In the case of Galway City Council, the only settlement examined in this regard was "Galway City and Suburbs". In the case of Galway City and Suburbs, while there was capacity to meet its 2032 population targets, it was

noted that a “Level of Service” improvement will be required as demand increases, suggesting some form of infrastructure deficits exist within the network.

Table 6: Percentage of settlements with capacity available vs where capacity constraints exist in the “Water Supply Capacity Register”, by the counties of the Northern and Western Region of Ireland

County	Capacity Available	Capacity Constraints exist ⁶⁷
Cavan	68.4%	31.6%
Donegal	17.7%	82.3%
Galway City	0.0%	100.0% ⁶⁸
Galway County	20.9%	79.1%
Leitrim	33.3%	66.7%
Mayo	13.8%	86.2%
Monaghan	88.2%	11.8%
Sligo	68.2%	31.8%
Roscommon	76.0%	24.0%
NWR	39.1%	60.9%

Source: Uisce Éireann⁶⁹

Another concern is that these types of infrastructure deficits were also evident in the Northern and Western Region’s key urban centres, with the development of these settlements central to the region delivering on the vision of effective regional development, as per the NPF and the RSES. Notably – based on the data provided by Uisce Éireann – the following key urban centres were found to have some form of infrastructure deficits within its water supply network, namely:

- ◆ Galway City and Suburbs: “Capacity Available – Level of Service Improvement Required”
- ◆ Letterkenny: “Potential Spare Capacity – Level of Service Improvement Required”
- ◆ Ballinasloe: “Potential Spare Capacity – Level of Service Improvement Required”
- ◆ Tuam: “Capacity Available – Level of Service Improvement Required”
- ◆ Carrick-on-Shannon: “Capacity Available – Level of Service Improvement Required”
- ◆ Roscommon Town: “Capacity Available – Level of Service Improvement Required”
- ◆ Castlebar: “Capacity Available – Level of Service Improvement Required”
- ◆ Ballina: “Capacity Available – Level of Service Improvement Required”

The only “Key Towns” in the Northern and Western Region of Ireland that had capacity available to meet its 2032 population targets – without any improvements needed – were Cavan Town and Monaghan Town, while the “Regional Growth Centres” of Sligo Town and Athlone also had capacity available to meet its population targets.

⁶⁷ Includes settlements under the categories of “Capacity Available – Level of Service Improvement Required”, “Potential Capacity Available – Level of Service Improvement Required” or “Capital Investment Required”

⁶⁸ Galway City and Suburbs is included under the category titled “Capacity available – level of service improvement required”, with Galway City and Suburbs the only settlement examined in this dataset.

⁶⁹ Some figures do not sum due to rounding in excel

In addition to these issues, there is also considerable challenges regarding the Northern and Western Region’s wastewater infrastructure. The scale of these deficits were evident from Uisce Éireann’s latest “Waste Water Treatment Capacity Registers”, which was provided to the Northern and Western Regional Assembly by Uisce Éireann on the 30th of June 2023. The next version of this register is expected to be released after the publication of the “Regional Infrastructure Tracker”, therefore the information presented in this sub-section represents the most up-to-date dataset at the time of writing of this publication. The register is based on loads received in 2022 and indicates the current treatment capacity to accommodate growth, under the following colour-code categories:

- ◇ Green, which indicates that there is spare treatment capacity available now or by the completion of a project currently at construction.
- ◇ Orange, which indicates that there is potential spare treatment capacity available to achieve at least Urban Waste Water Directive standards. If a settlement is included in this category, then any relevant connection applications will be assessed on an individual basis considering their specific load requirements, while engagement with Uisce Éireann’s “Connections and Developer Services Team” ahead of planning a project is required.
- ◇ Red, which indicates that there is no spare treatment capacity.

As evident from Table 7, 25.2 per cent of the settlements in the Northern and Western Region of Ireland either have no spare treatment capacity or have some potential spare treatment capacity in terms of their wastewater infrastructure. Of the Local Authorities in the Northern and Western Region of Ireland, Cavan registered the highest percentage of settlements that either have no spare treatment capacity or have some potential spare treatment capacity, at 42.3 per cent, followed by Donegal at 37.5 per cent, Monaghan at 30.8 per cent and Sligo at 25 per cent. Relatively lower ratios in this regard were recorded in Leitrim (17.4%), Galway County (17.1%), Roscommon (16.1%) and Mayo (13.6%).

Table 7: Percentage of settlements with capacity available vs where capacity constraints exist in the “Waste Water Treatment Capacity Registers”, by the counties of the Northern and Western Region of Ireland

County	Spare treatment capacity is available	Capacity constraints exist ⁷⁰
Cavan	57.7%	42.3%
Donegal	62.5%	37.5%
Galway County	82.9%	17.1%
Galway City	100.0%	0.0%
Leitrim	82.6%	17.4%
Mayo	86.4%	13.6%
Monaghan	69.2%	30.8%
Sligo	75.0%	25.0%
Roscommon	83.9%	16.1%
NWR	74.8%	25.2%

Source: Uisce Éireann

⁷⁰ Either no spare treatment capacity available / some potential treatment capacity available

These type of infrastructure deficits are undermining the delivery of several “National Strategic Outcomes” (NSO), including “NSO 1: Compact Growth”, “NSO 3: Strengthened Rural Economies and Communities” and “NSO 9: Sustainable Management of Water, Waste and Other Environmental Resources” in the National Planning Framework (NPF). Such deficits will also affect the implementation of the following “National Policy Objectives” (NPOs), namely:

- NPO 3b: Deliver at least half (50%) of all new homes that are targeted in the five Cities and suburbs of Dublin, Cork, Limerick, Galway and Waterford, within their existing built-up footprints¹
- NPO 3c: Deliver at least 30% of all new homes that are targeted in settlements other than the five Cities and their suburbs, within their existing built-up footprints
- NPO 5: Develop cities and towns of sufficient scale and quality to compete internationally and to be drivers of national and regional growth, investment and prosperity.
- NPO 7 which – amongst other things – aims to strengthen the Ireland’s overall urban structure, particularly in the Northern and Western and Midland Regions, to include “the regional centres of Sligo and Letterkenny in the North-West, Athlone in the Midlands and cross-border networks focused on the Letterkenny-Derry North-West Gateway Initiative and Drogheda-Dundalk-Newry on the Dublin-Belfast corridor”
- NPO 15: Support the sustainable development of rural areas by encouraging growth and arresting decline in areas that have experienced low population growth or decline in recent decades.
- NPO 56: Sustainably manage waste generation, invest in different types of waste treatment and support circular economy principles, prioritising prevention, reuse, recycling and recovery, to support a healthy environment, economy and society.

NPO 63: Ensure the efficient and sustainable use and development of water resources and water services infrastructure in order to manage and conserve water resources in a manner that supports a healthy society, economic development requirements and a cleaner environment.

4.7: Green Infrastructure Deficits

Other challenges facing the Northern and Western Region of Ireland – along with all regions globally – is the need to protect and enhance green infrastructure assets. In this regard, green infrastructure assets are among the most widely applicable, economically viable and effective tools in combating the impacts of climate change and in protecting and growing the biodiversity profile of regions. Therefore, the enhancement of the Northern and Western Region’s green infrastructure assets – which includes but are not limited to its forests, rivers and lakes – could not be more important.

The scale of deficits on green infrastructure was to some degree reflected in the Environmental Protection Agency’s (EPA) data on biological quality of river water bodies, with this information provided to the Northern and Western Regional Assembly through a private request on the 17th of June 2024. The biological quality of river water bodies across the country is assessed as part of the National Water Quality Monitoring Programme. The EPA assesses macroinvertebrate communities to categorise the biological quality (Q value) of a river into five classes, which range from high, good, moderate, poor or bad. Macroinvertebrates are the main biological element used to determine river water quality, with the latest assessment period covering the quality of all river water bodies between 2020 and 2023. This includes the more recent updates from 2022 and 2023. It should be noted that a total of 12 water bodies last surveyed in 2019 were also included in this data.

As per the EPA’s data, 55.3 per cent of river water bodies in Ireland were considered to have a satisfactory biological status (i.e. high or good biological quality) between 2020 and 2023, with below average ratios registered in 4 out of the 9 Local Authorities of the Northern and Western Region of Ireland. In the Northern and Western Region of Ireland, Monaghan had the lowest proportion of rivers considered to be in satisfactory ecological status – at 25 per cent – with below average ratios recorded in Roscommon (43.8%), Galway City Council (50%) and Donegal (52.5%). Although above average ratios were registered in Local Authorities such as Cavan (58%), Galway County (61.9%), Leitrim (68.6%), Sligo (70.7%) and Mayo (80.1%), these areas still had a notably high percentage of river water bodies which had a biological status that was either moderate, poor or bad. For example, 42 per cent of river water bodies in Cavan were considered to have a biological status that was either moderate, poor or bad, with the corresponding ratio for Galway County at 38.1 per cent and Leitrim at 31.4 per cent.

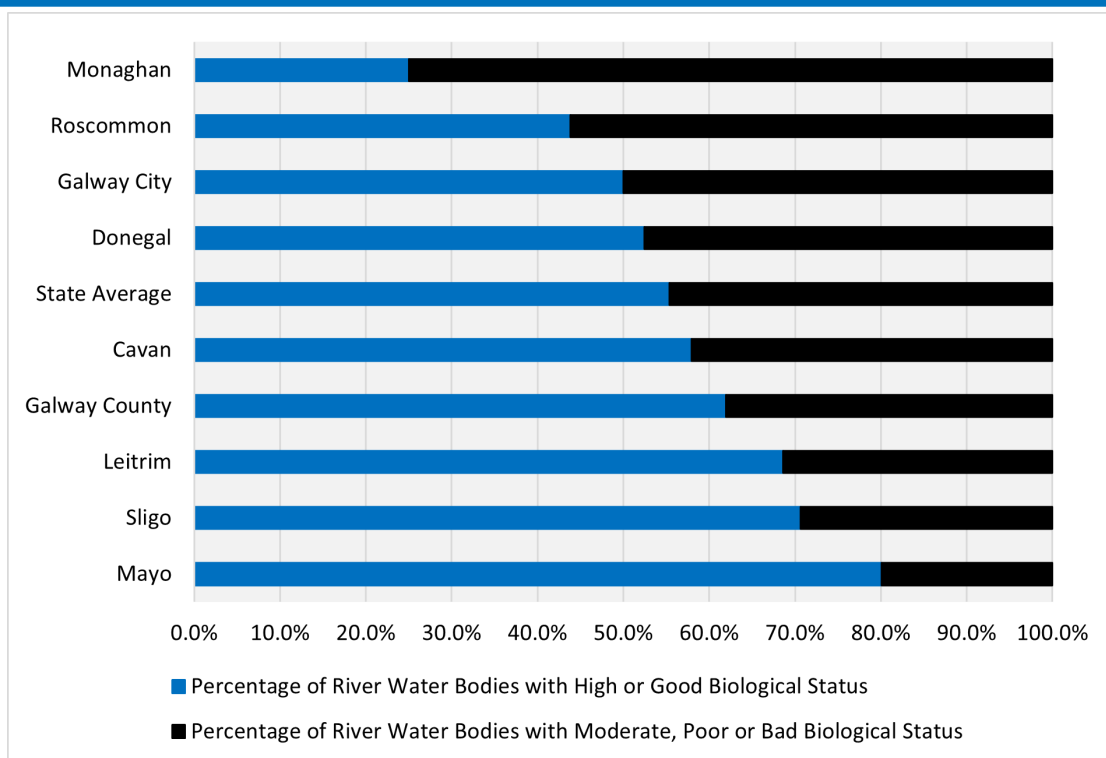
The EPA also monitors the biological quality of lakes, with this indicator based on the assessment of the biology of 224 monitored lakes for the period of 2021 to 2023. Similar to the previous material, lake biology is also categorised into five classes, namely high, good, moderate, poor, and bad. Lakes in high and good quality are considered to be in a satisfactory condition whereas lakes in moderate, poor or bad quality are deemed to be in an unsatisfactory condition. The biological elements that are assessed for this indicator are aquatic plants, phytoplankton, macroinvertebrates, phytobenthos and fish.

As per the EPA’s data, 54 per cent of lakes in Ireland were considered to have a satisfactory biological status (i.e. high or good biological quality) between 2021 and 2023, with below average ratios registered in 4 out of the 8 counties of the Northern and Western Region of Ireland. Cavan had the lowest proportion of lakes considered to be in a satisfactory ecological status – at 3.6 per cent – with below average ratios recorded in Leitrim (15.4%), Monaghan (20%) and Roscommon (33.3%). Galway had the highest percentage of lakes with a high or good biological quality at 83.3 per cent, with relatively high ratios also recorded in Donegal at 79.3 per cent and Mayo at 75 per cent. Although Sligo recorded an above average ratio in this regard, it is important to note that 42.9 per cent of its lakes were considered to have a moderate, poor or bad biological status.

Similar deficits were also found regarding afforestation in the Northern and Western Region of Ireland, with the level of afforestation in the region falling notably in recent years, as evident from Figure 15. In 2023, the Northern and Western Region of Ireland had an afforestation area of 718 ha⁷¹, with the size of afforestation progressively dropping in every year between 2016 and 2021, with an increase of 11 per cent between 2021 and 2022, with a decline of 23 per cent between 2022 and 2023. Of the counties of the Northern and Western Region of Ireland, Roscommon had the highest afforestation area at 189 ha in 2023, followed by Galway at 139 ha, Mayo at 131 ha and Leitrim at 102 ha. As can be seen from Figure 15, there was a notable decline in the size of afforestation in the Northern and Western Region of Ireland over the past decade, progressively dropping from 2,249 ha in 2013 to 718 ha in 2023. Although much of this activity is due to commercial forestry – which can be limited in its benefits to biodiversity depending on the type of trees planted and other factors – this information nevertheless gives an indication of the region’s challenges in growing and supporting our region’s green infrastructure assets.

These types of deficits in the Northern and Western Region of Ireland will undermine the delivery of a handful of “National Strategic Outcomes” (NSO) in the “National Planning Framework” (NPF), specifically “NSO 8: Transition to a Low Carbon and Climate Resilient Society” and “NSO 9: Sustainable Management of Water, Waste and other Environmental Resources”.

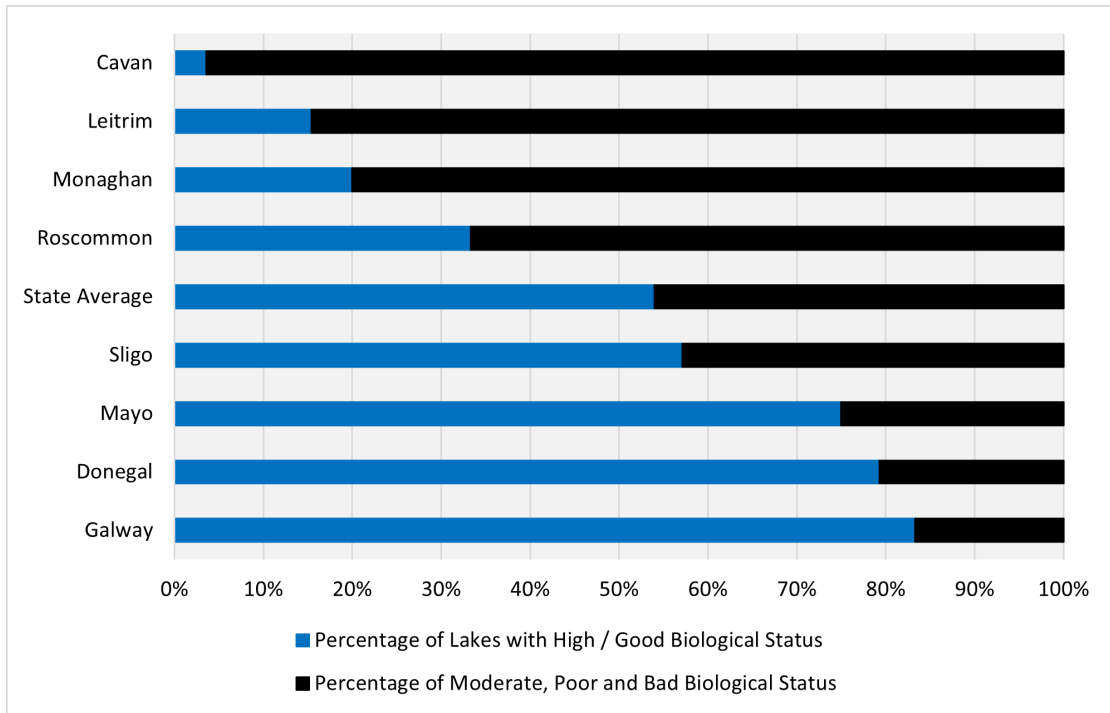
Figure 14: Biological status of river water bodies in the Local Authorities of the Northern and Western Region of Ireland, 2020-2023



Source: EPA

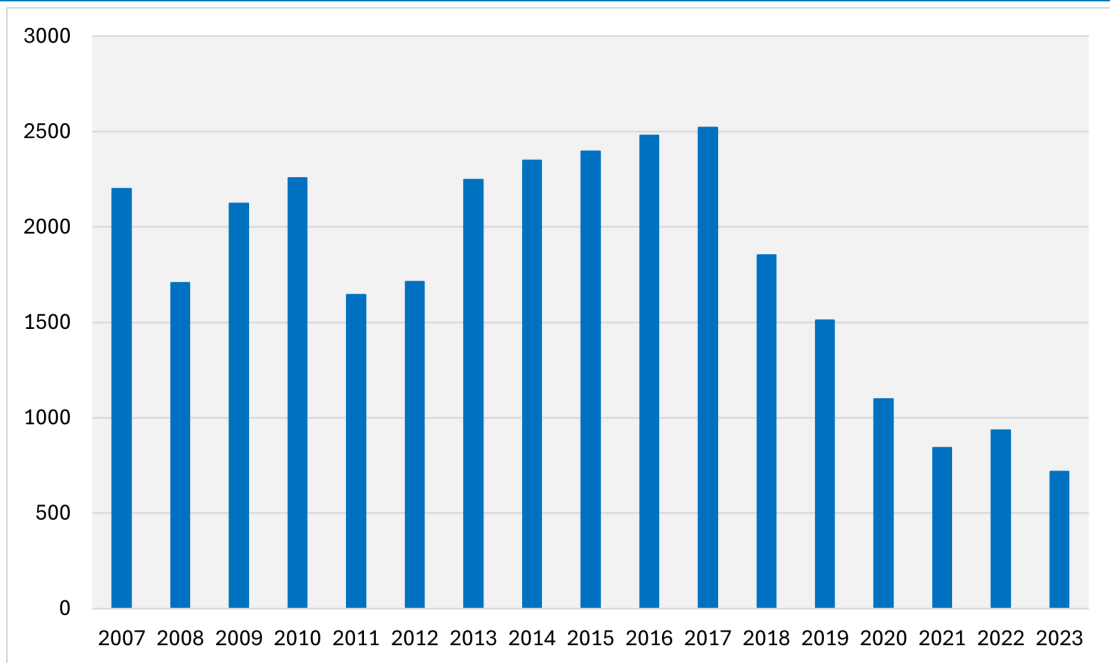
⁷¹ Hectares

Figure 15: Biological status of lakes in the counties of the Northern and Western Region of Ireland, 2021-2023



Source: EPA

Figure 16: Total afforestation (ha) in the Northern and Western Region of Ireland, 2007-2023



Source: CSO⁷²

⁷² <https://data.cso.ie/table/AFA01>

4.8: Electrical Grid Infrastructure Deficits

Figure 17 illustrates the scale of infrastructure deficits within the region’s electrical grid, with this material highlighted by representatives from Eirgrid at the April meeting of the Northern and Western Regional Assembly, with this material also noted in published material from Eirgrid.⁷³ The severity of these deficits is indicated using the colour coding described in the table underneath Figure 17, with colour coordinated groupings as follows:

- ◆ **Cream:** Marginal risk of overloading (i.e. circuit loaded up to 101% thermal rating for 1% of the year)
- ◆ **Yellow:** Small risk of overloading (i.e. circuit loaded up to 105% thermal rating for 5% of the year)
- ◆ **Orange:** Moderate risk of overloading (i.e. circuit loaded up to 110% thermal rating for 10% of the year)
- ◆ **Red:** Heavy risk of overloading (i.e. circuit loaded up to 120% thermal rating for 20% of the year)
- ◆ **Dark Red:** Severe risk of overloading (i.e. circuit loaded up to 130% thermal rating for 30% of the year)
- ◆ **Brown:** Extreme risk of overloading (i.e. circuit loaded in excess of 130% thermal rating for 30% of the year)

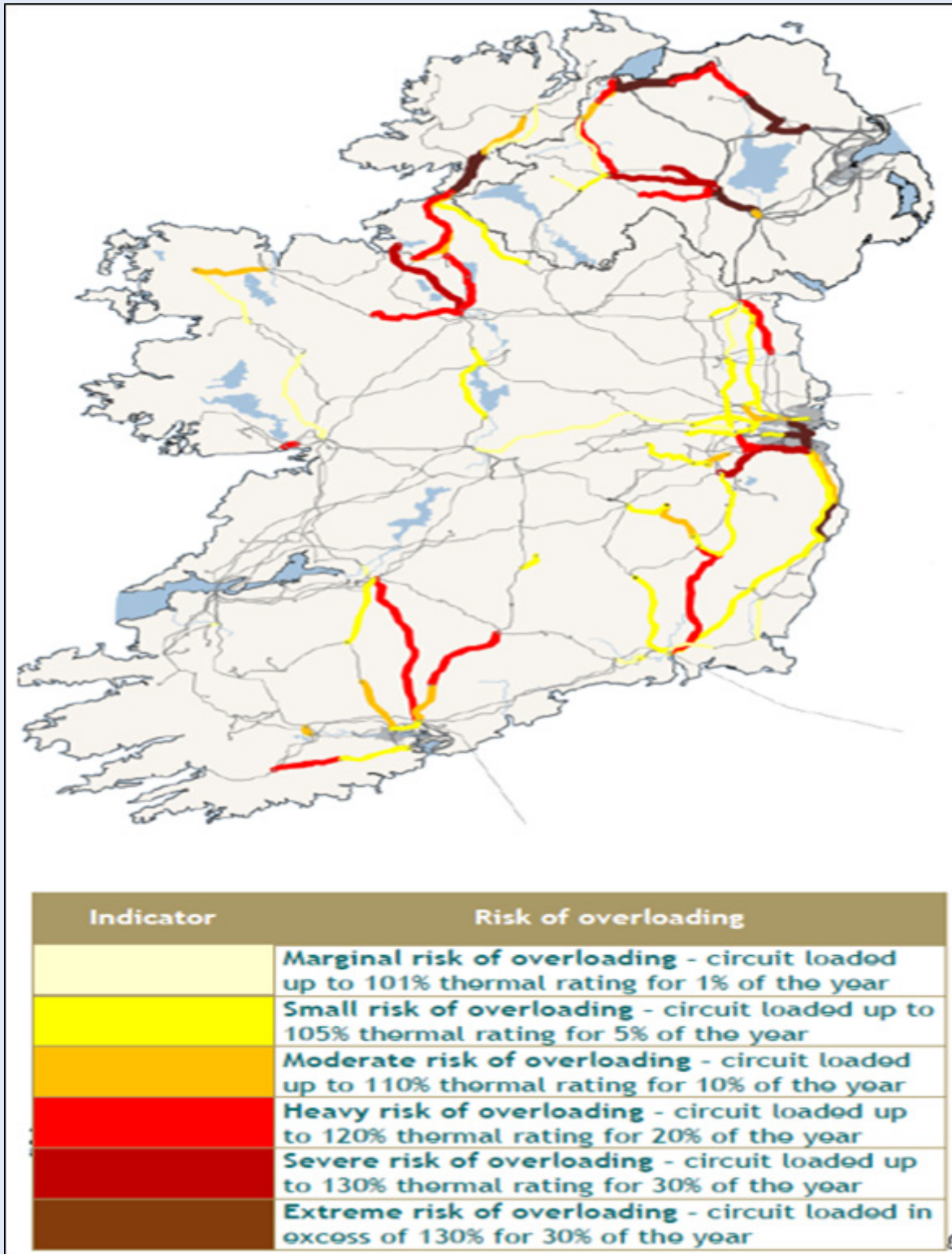
Based on the material provided by Eirgrid, it seems there are a number of electrical lines located across the Northern and Western Region of the island of Ireland which are at high risk of overloading. According to Eirgrid, many of the 110 kV circuits in the north-west area of Northern Ireland see a significant risk of overloading, with such deficits credited to the large increase in onshore wind generation in the area and the lack of capacity to accommodate this increase. Likewise, 110 kV circuits in the upper end of the Northern and Western Region of Ireland – in particular in counties such as Donegal and Sligo – see a high risk of overloading, with such a risk also driven by an increase in onshore wind generation. Such deficits pose a risk in supporting the region’s transition to a low carbon society, undermining efforts to further develop onshore wind energy in the region, while also restricting opportunities associated with future offshore wind energy developments off the coast of the Northern and Western Region of Ireland.

These type of infrastructure deficits are undermining the delivery of “National Strategic Outcome 8” in the National Planning Framework (NPF) which seeks to support Ireland’s transition to a low carbon and climate resilient society, while also affecting the implementation of the following “National Policy Objectives”, namely:

- ◆ NPO 45: In co-operation with relevant Departments in Northern Ireland, support and promote the development of the North West City Region as interlinked areas of strategic importance in the North-West of Ireland, through collaborative structures and a joined-up approach to spatial planning.
- ◆ NPO 47: In co-operation with relevant Departments in Northern Ireland, strengthen all-island energy infrastructure and interconnection capacity, including distribution and transmission networks to enhance security of electricity supply.

⁷³ https://cms.eirgrid.ie/sites/default/files/publications/Shaping_Our_Electricity_Future_Roadmap.pdf

Figure 17: Risk of overloading in Ireland’s electrical grid network, by severity of risk



Source: Eirgrid

4.9: Rising Regional Disparities

As well as contributing to sizeable infrastructure deficits in the Northern and Western Region, the lack of investment in the region's infrastructure assets is clearly contributing to rising regional disparities in Ireland across a host of socio-economic indicators. This is primarily due to the fact that the provision of high-quality infrastructure assets are key to generating agglomeration benefits, with the OECD noting that agglomeration benefits is associated with reducing regional disparities⁷⁴ within countries. The scale of these regional imbalances is particularly evident from the latest Census results regarding "Profile 1: Population Distribution and Movements",⁷⁵ with such information showing the regional distribution of population growth in Ireland between 2016 – which represents the baseline year of the NPF – and 2022.

Between 2016 and 2022, the population of the Northern and Western Region of Ireland rose to 905,439, representing growth of 6.8 per cent which was below the national growth rate of 8.1 per cent. Each of the counties of the Northern and Western Region of Ireland experienced an increase in population between 2016 and 2022, with above-average growth rates found in Leitrim (+9.8%) and Roscommon (+8.9%), with below-average rates registered in Donegal (+5%), Mayo (+5.7%), Monaghan (+6.4%), Sligo (+7.1%), Cavan (+7.3%) and Galway (+7.6%).

Although an increase in the population of the Northern and Western Region is to be welcomed, it is important to acknowledge that population growth in Ireland continues to be overly concentrated in the Eastern and Midland Region, with such trends contributing to further regional imbalances in Ireland and contrary to the vision and objectives of the NPF and the RSES. Such imbalances are evident from the fact that the population of the Eastern and Midland Region of Ireland rose by 9.1 per cent between 2016 and 2022 – compared to the State average of 8.1 per cent – with some of the highest growth rates in Ireland found in the region's counties. With the exception of Offaly, all of the counties of the Eastern and Midland Region of Ireland experienced an above-average population growth rate between 2016 and 2022, with the highest growth rates found in Longford (+14.4%), Meath (+13.2%), Kildare (+11.4%), Wicklow (+9.4%) and Laois (+8.5%).

As a result of these trends, the Eastern and Midland Region accounted for 55 per cent of all population growth in Ireland between 2016 and 2022, with the Northern and Western Region and the Southern Region collectively accounting for 45 per cent of growth during this time period. Given that the NPF acknowledges that the Greater Dublin Area – and to a lesser extent the wider Eastern and Midland Region of Ireland – has witnessed an overconcentration of population, homes, and jobs, it is clear that the distribution of this growth is contrary to the vision and objectives of the NPF, specifically National Policy Objective (NPO) 1a which aims to ensure that the:

“projected level of population and employment growth in the Eastern and Midland Regional Assembly area will be at least matched by that of the Northern and Western and Southern Regional Assembly areas combined”.

As a result of these trends, Ireland's population is becoming more concentrated in the Eastern and Midland Region, with the Northern and Western Region's share of Ireland's population progressively falling over the past number of years. For example, the Northern and Western Region accounted for 18.6 per cent of Ireland's population in 1991, and despite having recorded population growth since the early 1990s, the region's share of Ireland's population has progressively fallen to 17.6 per cent in 2022. In conjunction with this, the Eastern and Midland Region accounted for 46.6 per cent of Ireland's population in 1991, with its share of Ireland's population progressively rising to 49.3 per cent in 2022.

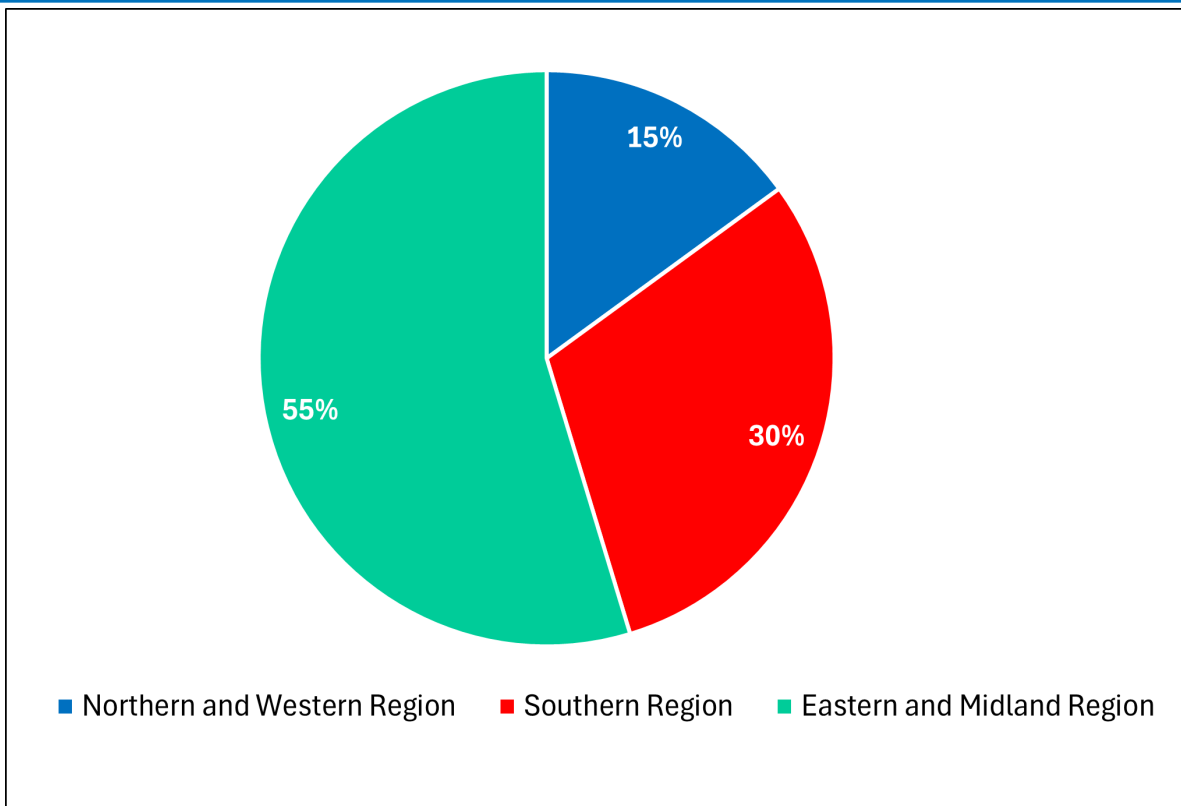
Furthermore, based on commencement notice data from the Department of Housing, Local Government and Heritage, these trends are likely to worsen in the coming years, with this data acting as a general proxy for the regional distribution of future population growth in Ireland. As evident from Figure 18, of the 32,801 residential units which were commenced in Ireland in 2023, only 9 per cent were located in the Northern and Western Region of Ireland, with 65 per cent located in the Eastern and Midland Region, with such trends completely contrary

⁷⁴ <https://www.oecd-ilibrary.org/sites/9789264293137-5-en/index.html?itemId=/content/component/9789264293137-5-en#wrapper>

⁷⁵ <https://data.cso.ie/table/F1001>

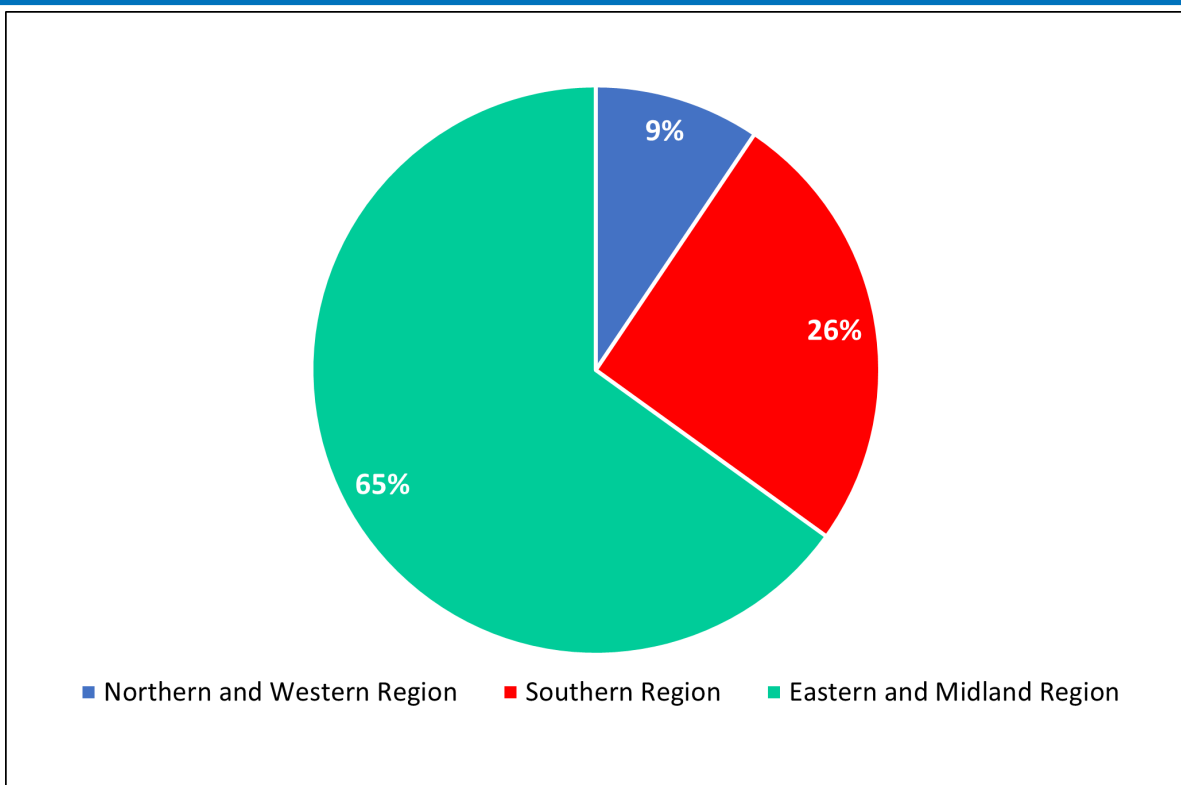
to NPO 1 of the NPF, which seeks to address historical regional imbalances in Ireland. The corresponding data for the latest available quarter in 2024 – namely between January to March 2024 – shows that these trends remain unchanged.

Figure 18: Distribution of population growth in Ireland by the NUTS 2 Regions of Ireland, 2016-2022



Source: CSO, Census

Figure 19: Distribution of the number of residential units commenced, by the NUTS 2 Regions of Ireland, 2023



Source: DHLGH

Distribution of Future Projects of Scale

5

Considering the scale of legacy underinvestment in the infrastructure of the Northern and Western Region of Ireland, the implementation of the latest National Development Plan (NDP) (2021-2030)⁷⁶ could not be more important. With an initial investment package of €165 billion, the NDP (2021-2030) aims to deliver infrastructure projects of scale which will support the vision and objectives of the National Planning Framework (NPF) and the Regional Spatial and Economic Strategy (RSES), thereby supporting the delivery of effective regional development in Ireland.

With this in mind – and to provide an indication of planned investment for the Northern and Western Region of Ireland under NDP 2021-2030 – Section 5 of this publication will examine:

- The regional distribution of infrastructure projects of scale which are currently in the pipeline under the NDP (2021-2030)
- Other projects of scale which are committed to be delivered in the Northern and Western Region of Ireland under the NDP (2021-2030).

5.1: Infrastructure Projects in the Pipeline

In May 2024, the Department of Public Expenditure, NDP Delivery and Reform announced an updated “MyProjectIreland Tracker”.⁷⁷ In this regard, the “MyProjectIreland Tracker” provides detailed information about past, current and future infrastructure projects of scale and programmes which have either been delivered or are in the pipeline to be delivered as part of the implementation of the NDP 2021-2030. The information presented in this section of the publication examines the latest version of the tracker which was gathered by the Department of Public Expenditure, NDP Delivery and Reform during Q1-2024, with the Assembly’s analysis in this section based on the Department’s data as of the 21st of May 2024.

As noted in the “introduction” tab on the “MyProjectIreland Tracker”, this information focuses on **“all the major projects and programmes currently part of Project Ireland 2040”** and **“focuses mainly on projects and programmes with costs greater than €20 million”**.⁷⁸ Consultations with officials from the Department of Public Expenditure, NDP Delivery and Reform found that although there were a few projects listed below the threshold of €20 million in previous versions of the tracker, it was noted that for this iteration it appears to have one listing below the €20 million threshold in the tab titled “Database – Programme”, with the information presented in the tab titled “Database – Projects” focused on specific projects worth more than €20 million. Furthermore, the Minister’s statement at the launch of the “MyProjectIreland Tracker” notes it provides a composite update on the progress of all major investments in the pipeline that make up Project Ireland 2040.⁷⁹

⁷⁶ <https://www.gov.ie/en/collection/f828b-myprojectireland-interactive-map/>

⁷⁷ <https://www.gov.ie/en/collection/f828b-myprojectireland-interactive-map/>

⁷⁸ Based on consultations with officials in the National Investment Office (Department of Public Expenditure, NDP Delivery and Reform) on the 30th of April 2024 and in line with content presented in the “MyProjectIreland Tracker”

⁷⁹ <https://www.gov.ie/en/press-release/7b92d-minister-donohoe-launches-updated-project-ireland-2040-progress-tracker/>

Therefore, while the dataset is not displaying all of the infrastructure projects that are currently in the pipeline under the NDP, it is displaying information on all of the infrastructure projects and programmes worth more than €20 million, thereby providing some indication of the level of planned investments in the region under the NDP (2021-2030). It should also be noted that the latest “MyProjectIreland Tracker” is a point in time and this data is subject to future updates by the Department of Public Expenditure, NDP Delivery and Reform, with the analysis undertaken in this section based on the version of the dataset as of the 21st of May 2024. Likewise, although the tracker focuses on all major investments in the pipeline that make up Project Ireland 2040, additional information can be found on the “MyProjectIreland Map⁸⁰”. This resource provides the same information from the Tracker while also displaying information on projects which are relatively smaller in scale (i.e. below €20 million) and which have not been documented on the tracker.

To provide some indication of the level of planned investment for the Northern and Western Region of Ireland as part of the implementation of the NDP (2021-2030), the Assembly has examined the data presented in 2 tabs in the “MyProjectIreland Tracker”, specifically the tab titled “Database – Projects” and “Database – Programmes”. Based on the information provided in the tab titled “Database – Projects”, the total number of projects of scale that have or will be delivered in the Northern and Western Region of Ireland amounts to 48 projects as of the 21st of May 2024. This implies that the Northern and Western Region of Ireland accounts for 13.6 per cent of the NUTS 2 Regional allocations of projects of scale,⁸¹ which was below the region’s share of Ireland’s population which was 17.6 per cent as per Census 2022.⁸²

This is notably lower compared to the corresponding allocations for the other NUTS 2 Regions of Ireland, namely the Eastern and Midland Region (176 projects) – which accounted for 49.7 per cent of all projects allocated by NUTS 2 Regions – and the Southern Region (130), which accounted for 36.7 per cent of the projects allocated on a NUTS 2 Regional level. As evident from Figure 20, both the Southern Region and Eastern and Midland region of Ireland recorded an above average allocation of infrastructure projects of scale that either have or will be delivered as part of the implementation of the NDP.

That said, it is important to note that the distribution of these projects of scale by the NUTS 2 Regions of Ireland include projects which have already been completed in the regions. For example – in the case of the Northern and Western Region of Ireland – these figures would include completed projects of scale such as – but not limited to – the N17/N18 Gort-Tuam motorway (PPP⁸³), the N59 Moycullen Bypass and N5 Westport to Turlough.

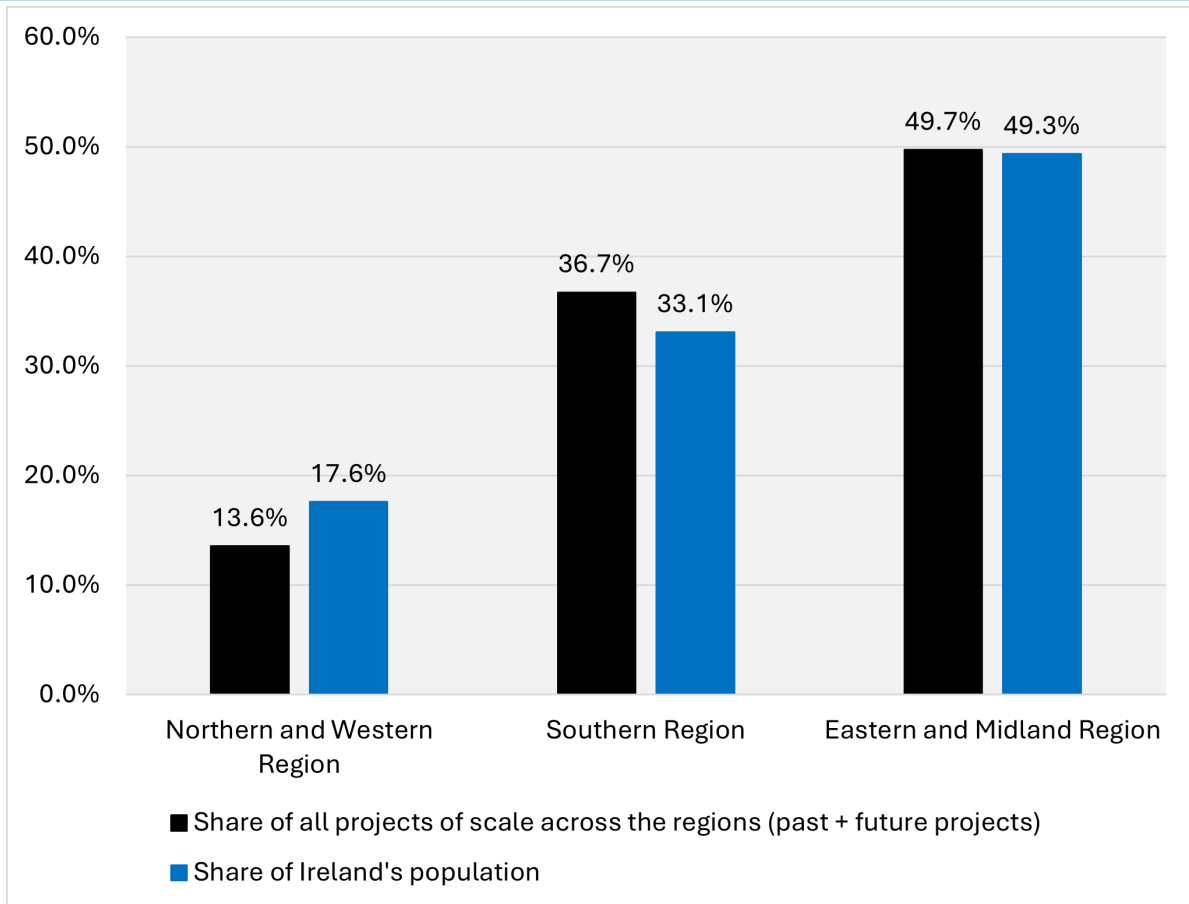
⁸⁰ <https://storymaps.arcgis.com/stories/7682860c80d64a62b90e8a1ca3d16364>

⁸¹ Excludes projects considered on national scale, which amounts to 17 projects (i.e. National Broadband Scheme)

⁸² Census 2022: <https://www.cso.ie/en/releasesandpublications/ep/p-cpsr/censusofpopulation2022-summaryresults/keyfindings/>

⁸³ Public Private Partnership

Figure 20: Distribution of all infrastructure projects of scale⁸⁴ (past and future) under the “MyProjectIreland Tracker”, by the NUTS 2 Regions of Ireland vs their share of Ireland’s population



Source: “MyProjectIreland Tracker” (May 2024). Census 2022.

⁸⁴ Projects which will cost more than €20 million.

Therefore, to provide a sense of planned investments that are in the pipeline across the NUTS 2 Regions of Ireland, the Assembly has removed infrastructure projects of scale which are either completed in previous years or are due to be completed in 2024. When these type of infrastructure projects are removed,⁸⁵ then the Northern and Western Region of Ireland's allocation of projects amounts to 31 projects of scale. Based on the text from the "MyProjectIreland Tracker", the following projects that have been either completed in previous years or are due to be completed in 2024 are as follows:

- ◆ Ursuline Convent, Sligo
- ◆ N4 Collooney to Castlebaldwin
- ◆ N5 Westport to Turlough
- ◆ PPP: N17/N18 Gort-Tuam (Construction)
- ◆ N56 Mountcharles to Inver Road
- ◆ N59 Moycullen Bypass
- ◆ Oweninny Wind Farm Project (Phase 1)
- ◆ Electricity Transmission Network: Donegal 110kV Project
- ◆ Oweninny Wind Farm Project (Phase 2)
- ◆ Donegal (Group B) Sewerage Schemes Wastewater Treatment Plants
- ◆ Letterkenny Regional Water Supply Project including Creeslough Wastewater Treatment Plant
- ◆ Roscommon Sewerage Scheme
- ◆ Gairmscoil Mhuire - 71270G (School Building in Galway)
- ◆ Portiuncula University Hospital Ward Block
- ◆ University College Hospital Galway, Radiation Oncology Unit
- ◆ Colaiste Chiarain - 68325L (School Building in Roscommon)
- ◆ Monaghan Town (Primary Care Centre)

As evident from Table 8, of the 31 infrastructure projects of scale that are to be delivered in the Northern and Western Region of Ireland in the coming years, 8 are proposed Greenways, with 8 of these projects related to Health infrastructure and 4 related to Higher Education infrastructure. The sectoral composition of the remaining infrastructure projects of scale that are to be delivered in the Northern and Western Region of Ireland in the coming years are outlined in Table 8, with specific details outlined in Table 9.

Table 8: Sectoral distribution of future infrastructure projects of scale, that are to be delivered in the Northern and Western Region of Ireland beyond 2024

Sector	Northern & Western Region
Higher Education Infrastructure	4
Health Infrastructure	8
Water and Wastewater Infrastructure	3
Road Infrastructure	4
Greenways	8
Housing	3
Grid Network	1
Total Projects of Scale	31

Source: Northern and Western Regional Assembly using data from "MyProjectIreland Tracker" (May 2024)

⁸⁵ i.e. projects with a "Brief Description of Current Status of Project" that is regarded as being completed, with a "Construction Completion Date (Year)" before 2024 or in 2024, or which have been completed based on stakeholder knowledge.

Table 9: Future infrastructure projects of scale that are to be delivered in the Northern and Western Region of Ireland beyond 2024, by high-level sector

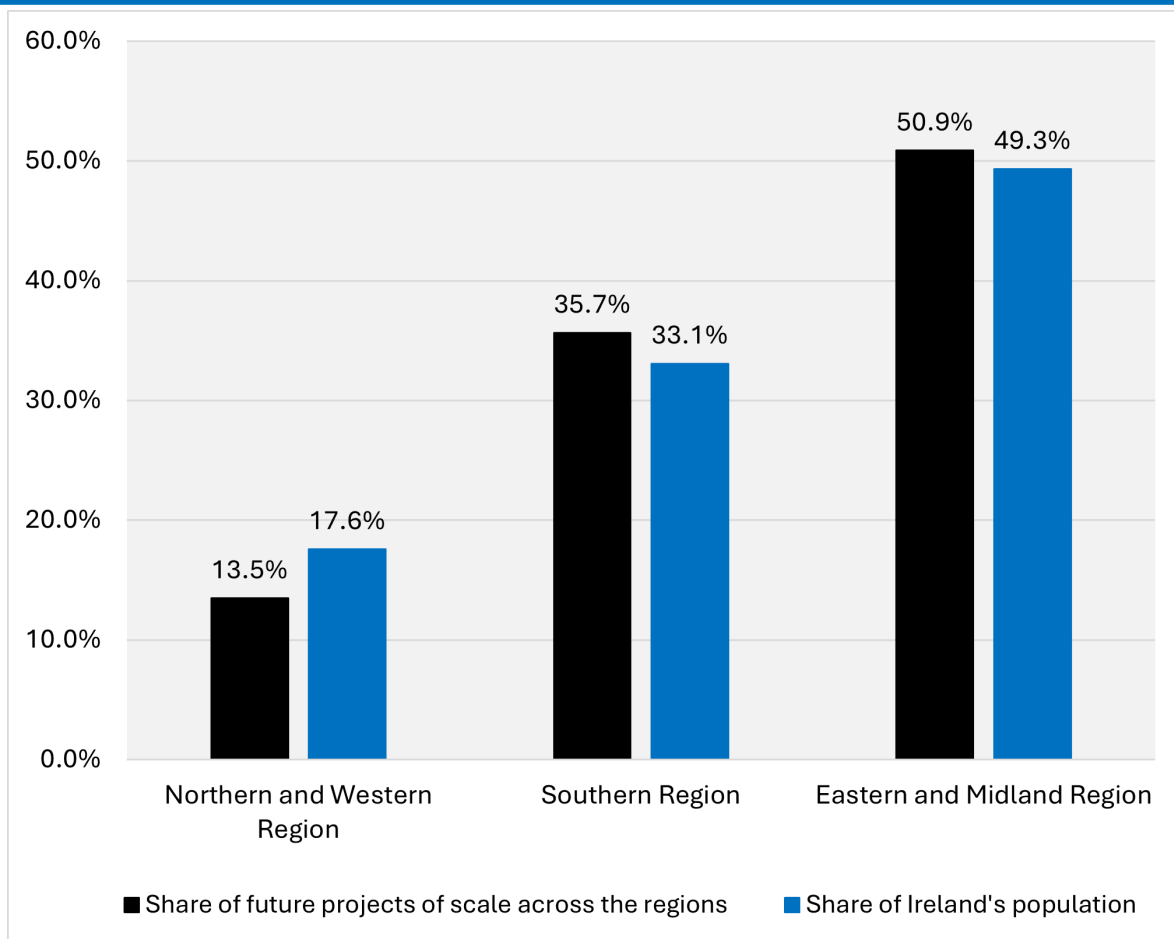
High-Level Sector	Project of Scale
Robbers' Lane, Maugheraboy, Sligo	Housing
Cheshire Homes Site, Ballina, Co. Mayo	Housing
Cairnsfoot Field (Brown's Field)	Housing
Galway City Ring Road	Road Infrastructure
N5 Ballaghaderreen to Scramoge	Road Infrastructure
Eastern Garavogue Bridge and Approach Road (Department of Transport element)	Road Infrastructure
N56 Dungloe to Glenties ⁸⁶	Road Infrastructure
Athlone to Ballyleague / Lanesborough Greenway	Greenway
Ballina Castlebar and Westport Interurban Greenway - Viaduct, Westport - Moy Cycle Br. Ballina	Greenway
Connemara - Galway to Oughterard Greenway	Greenway
Connemara - Derrygimlagh - Clifden - Kylemore Abbey Greenway	Greenway
Inishowen - Bunrana to Carndonagh Greenway	Greenway
Sligo Leitrim Northern Counties Railway Greenway - Sligo Town to Blacklion, Co. Cavan (extending to Enniskillen).	Greenway
Burtonport to Letterkenny Greenway	Greenway
Inishowen - Bridgend to Bunrana and Newtowncunningham Greenway	Greenway
Atlantic Technological University (Galway) STEM building	Higher Education
Atlantic Technological University (Letterkenny Campus) Library, IT and Education Building	Higher Education
NUI Galway Learning Commons	Higher Education
Atlantic Technological University (ATU) Future Living Lab (TSSPF)	Higher Education
Electricity Transmission Network: North Connacht 110kV Project	Grid Infrastructure
Galway City Wastewater Network	Water Infrastructure
Milford, Ramelton and Rathmullan Waste Water Treatment Plant	Water Infrastructure
Terryland Water Treatment Plant	Water Infrastructure
Sligo Hospital Redevelopment Phase 1	Healthcare
Cavan General Hospital, Emergency Department and Ward Block	Healthcare
Galway Emergency Department and Ward Block	Healthcare
Sligo University Hospital Ward Development	Healthcare
Elective Capacity Galway	Healthcare
Merlin Park, Units 5 & 6	Healthcare
Merlin Park University Hospital	Healthcare
HUB 04 - Galway City, Knocknacarra	Healthcare

Source: Northern and Western Regional Assembly using data from "MyProjectIreland Tracker" (May 2024)

⁸⁶ Phase 5 – N56 Letterilly to Kilraine being delivered over 2 phases. N56 Letterilly to Kilraine phase 1 construction is substantially completed (4.7kms), while phase 2 of the project (2.5kms) currently at enabling and procurement, construction likely to commence in 2024 according to the "MyProjectIreland Tracker".

Based on the above, the Northern and Western Region of Ireland will account for 13.5 per cent of infrastructure projects of scale that are currently in the pipeline to be delivered in the years beyond 2024,⁸⁷ which was again below the region's share of Ireland's population which was 17.6 per cent in 2022.⁸⁸ This is relatively lower compared to the corresponding allocations for the other NUTS 2 Regions of Ireland, namely the Eastern and Midland Region (117 projects) – which will account for 50.9 per cent of all projects that are to be delivered beyond 2024 – and the Southern Region (82), which will account for 35.7 per cent of these type of projects. As evident from Figure 21, both the Southern Region and Eastern and Midland Region of Ireland recorded an above average allocation of future infrastructure projects of scale that are currently in the pipeline as part of the implementation of the NDP. This current and ongoing trend has the potential to create a further gap in infrastructure quality across the NUTS 2 Regions and provision which is even greater than that already established and embedded across a multitude of sectors in the State, as was outlined across Chapter 4 .

Figure 21: Distribution of all future infrastructure projects of scale⁸⁹ under the “MyProjectIreland Tracker”, by the NUTS 2 Regions of Ireland vs their share of Ireland's population



Source: “MyProjectIreland Tracker” (May 2024). Only includes projects of scale that are to be completed beyond 2024. Census 2022.

⁸⁷ Excludes projects considered on national scale, which amounts to 19 projects (i.e. National Broadband Scheme).

⁸⁸ Census 2022: <https://www.cso.ie/en/releasesandpublications/ep/p-cpsr/censusofpopulation2022-summaryresults/keyfindings/>

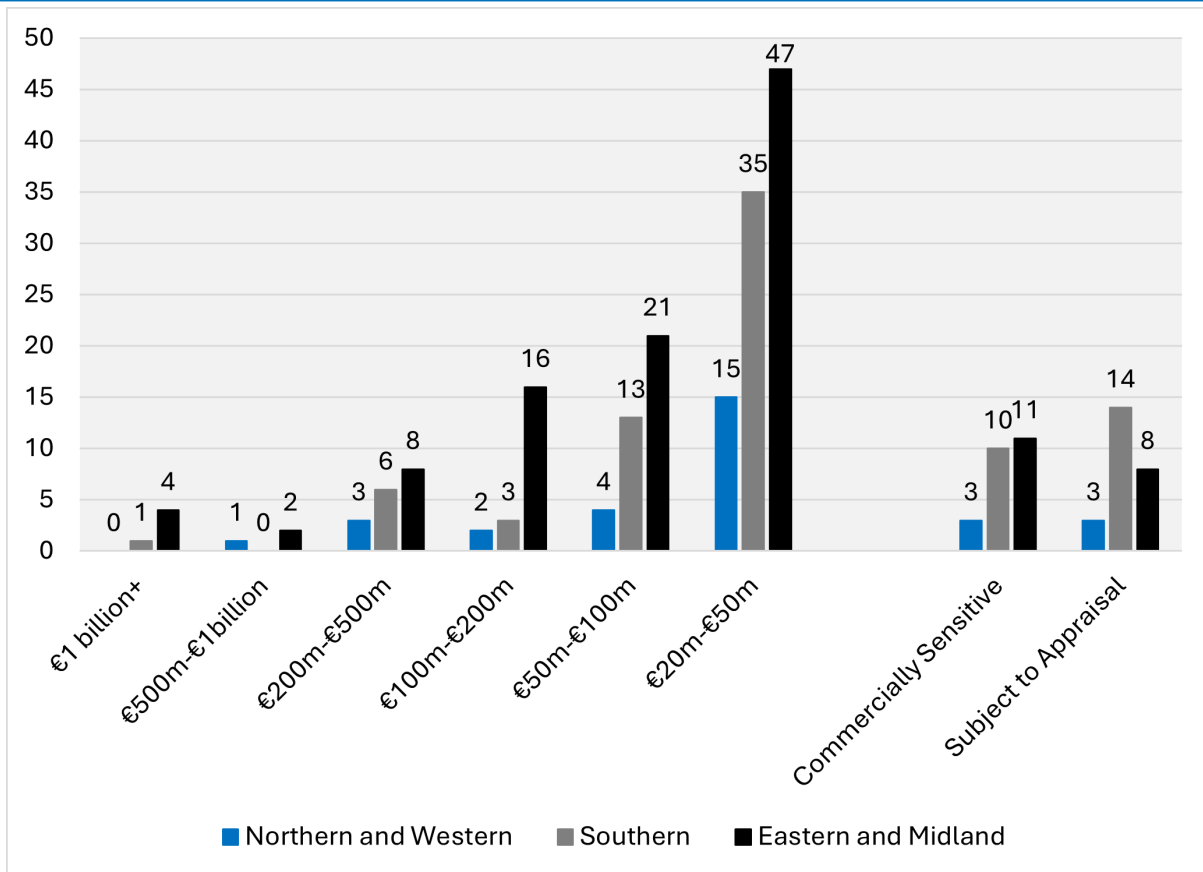
⁸⁹ Projects which will cost more than €20 million.

The “MyProjectIreland Tracker” shows the cost distribution of infrastructure projects of scale that have or will be allocated to the Northern and Western Region of Ireland, with Figure 22 – and the below text – displaying this information for projects of scale that are due to be completed in the years beyond 2024. As evident from Figure 22:

- ◆ The Northern and Western Region of Ireland will not receive any projects worth €1 billion or more, compared to 1 in the Southern Region and 4 in the Eastern and Midland Region of Ireland.
- ◆ For projects estimated to cost between €500 million and €1 billion, 1 project of this scale – namely the N6 Galway City Ring Road – is committed to be delivered in the Northern and Western Region of Ireland beyond 2024. For these types of projects, none will be delivered in the Southern Region and 2 will be delivered in the Eastern and Midland Region of Ireland beyond 2024.
- ◆ For projects estimated to cost between €200 and €500 million, 3 projects of this scale are due to be completed in the Northern and Western Region of Ireland in the coming years; with 6 to be delivered in the Southern Region and 8 in the Eastern and Midland Region of Ireland.
- ◆ For projects estimated to cost between €100 and €200 million, 2 projects of this scale are due to be completed in the Northern and Western Region of Ireland beyond 2024; with 3 to be delivered in the Southern Region and 16 in the Eastern and Midland Region of Ireland.
- ◆ For projects estimated to cost between €50 and 100 million, 4 projects of this scale are due to be completed in the Northern and Western Region of Ireland beyond 2024; with 13 to be delivered in the Southern Region and 21 in the Eastern and Midland Region of Ireland.
- ◆ For projects estimated to cost between €20 and €50 million, 15 projects of this scale are due to be completed in the Northern and western beyond 2024, with 35 to be delivered in the Southern Region and 47 in the Eastern and Midland Region of Ireland.

The cost estimates for the remaining infrastructure projects of scale – which are due to be completed in the years beyond 2024 – were not available given that they were either “commercially sensitive” or “subject to appraisal”. In the case of the Northern and Western Region of Ireland, 3 infrastructure projects of scale – which are due to be completed in the years beyond 2024 – were commercially sensitive, while 3 were also subject to appraisal. For the Southern Region of Ireland, 10 infrastructure projects of scale – which are due to be completed in the years beyond 2024 – were commercially sensitive, while 14 were also subject to appraisal. In the case of the Eastern and Midland Region of Ireland, 11 infrastructure projects of scale – which are due to be completed in the years beyond 2024 – were commercially sensitive, while 8 were also subject to appraisal.

Figure 22: Distribution of projects that are to be delivered by the NUTS 2 Regions of Ireland, beyond 2024, by cost category

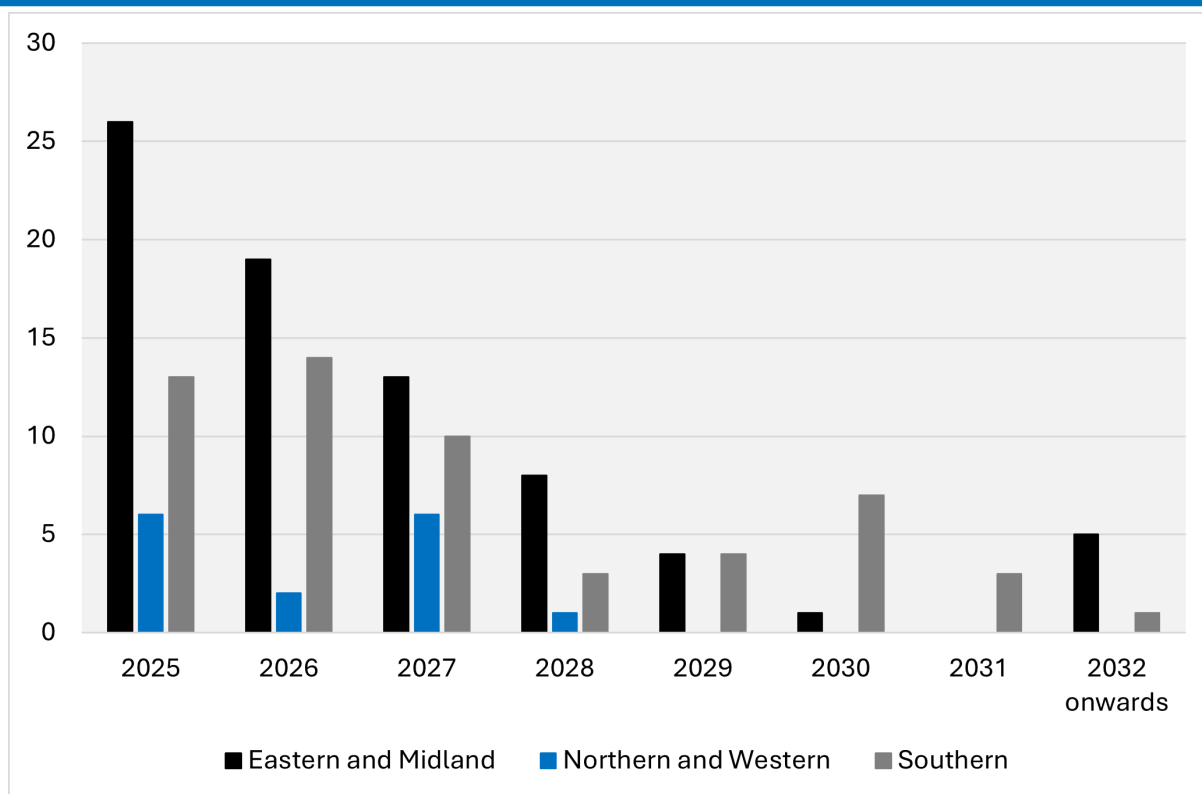


Source: "MyProjectIreland Tracker" (May 2024). Only includes projects of scale that are to be completed beyond 2024.

Furthermore, the “MyProjectIreland Tracker” shows the expected completion date of infrastructure projects of scale that have been delivered or will be delivered in the Northern and Western Region of Ireland, with Figure 23 displaying this information for projects of scale that are due to be completed in the years beyond 2024. It is important to note that this information excludes projects which have an expected completion date which is marked as being “subject to appraisal”, “subject to planning decision”, “subject to statutory processes”, “TBC”, “TBD” or “To be advised as planning & design progresses” as per the text of the “MyProjectIreland Tracker”.

As evident from Figure 23, 6 projects of scale are to be delivered in the Northern and Western Region in 2025, with 2 in 2026, 6 in 2027, and 1 in 2028. Beyond 2028 there is currently no future projects of scale in the pipeline for the Northern and Western Region of Ireland, albeit it should be noted a sizable proportion of these type of projects are still subject to appraisal or planning as noted above. In contrast during the same period, 26 projects of scale are in the pipeline to be delivered in the Eastern and Midland Region in 2025, with 19 in 2026, 13 in 2027, and 8 in 2028. Beyond 2028, the Eastern and Midland Region of Ireland has 10 projects of scale in the pipeline as part of the implementation of the NDP.

Figure 23: Distribution of projects that are to be delivered by the NUTS 2 Regions of Ireland, beyond 2024, by expected completion date



Source: “MyProjectIreland Tracker” (May 2024). Only includes projects of scale that are to be completed beyond 2024. Excludes projects which are still being subject to appraisal.

In addition to the data regarding projects of scale – which is sourced from the tab titled “Database – Projects” – it is important to note that the “MyProjectIreland Tracker” also displays data on investment “programmes” which will support the development of the Northern and Western Region’s infrastructure assets. This information is available on the tracker via the tab titled “Database – Programmes”. Based on the data from this tab in the “MyProjectIreland Tracker”, the following findings emerged, namely:

- ◆ A total of 141 programmes were either delivered or are in the pipeline to be delivered under the NDP, the majority of which (133) were considered national programmes, such as for example the IDA Ireland Regional Property Programme.
- ◆ Of the 141 programmes listed, 1 of these programmes – namely the Just Transition Fund – is considered a multi-county programme.
- ◆ A total of 3 programmes were specifically aimed at the Eastern and Midland Region of Ireland, namely “Heavy Rail Enhancement Programme - Greater Dublin Area”, BusConnects Dublin and DART+.
- ◆ A total of 4 were aimed specifically at the Southern Region of Ireland, namely the Limerick Regeneration Programme, the Cork Commuter Rail Programme, BusConnects Cork and the redevelopment of Limerick Prison.

Although there was no programme that was exclusively marked for the Northern and Western Region of Ireland, it is clear that many of the national programmes will support the development of the region’s infrastructure assets. For example, as noted in the tab titled “Database – Programmes”, the Regional Airports Programme – which is listed as a national programme – will support investments in the infrastructure of Donegal Airport and Ireland West Airport Knock, with similar situations evident across a number of listed national programmes. To what degree investments from these national programmes will support the Northern and Western Region’s infrastructure compared to corresponding investments in the other NUTS 2 Regions of Ireland remains to be seen, with the data in this regard not providing enough information to display the regional distribution of projects or funding under these programmes. To achieve this, more research will be required which goes beyond the stated objectives of this publication.

Therefore, while the analysis of the regional distribution of infrastructure projects of scale – which is based on data from the tab titled “Database – Projects” – provides some indication of the level of planned investment under the NDP 2021-2030, it is limited based on the lack of regional data regarding projects that will be supported under national programmes.⁹⁰ Nevertheless, the data presented in this sub-section of the publication – to some degree – suggests that there is a relative lack of infrastructure projects of scale that are currently in the pipeline for the Northern and Western Region of Ireland under the NDP 2021-2030.

⁹⁰ Data from the tab titled “Database – Programmes”

5.2: Other Infrastructure Project Commitments

In conjunction to this, there are several other infrastructure projects of scale which are committed to be delivered in the Northern and Western Region of Ireland as per the text of the NDP (2021-2030), with these projects listed in Table 10. These projects are not included in the tab titled “Database – Projects”, therefore they are not included in the analysis of data related to infrastructure projects of scale in Sub-Section 5.1. That said, they are acknowledged in the “MyProjectIreland Tracker” as being subject to appraisals or planning under the tab titled “Database – Programmes”, specifically under a listed programme titled “National Roads Network Pipeline Pre-Appraisal/Early Planning”.

As documented in Table 10, many of these infrastructure projects of scale were previously committed to be delivered under various NDPs, with some projects originally committed for delivery as far back as the NDP (2000-2006). For example, the delivery of the road schemes which comprise of the Donegal Ten-T Projects – namely the developments regarding the N15/N13 Ballybofey/Stranorlar Bypass, the N56/N13 Letterkenny to Manorcunningham and N14 Manorcunningham to Lifford/Strabane/A5 link⁹¹ – were originally committed to be delivered under the NDP (2000-2006), with commitments outlined on pages 12 and 13 and in Appendix 3 of that document. The Donegal Ten-T projects were also committed to under the NDP (2007-2013), Transport 21⁹² – which was announced in 2005 – the NDP (2018-2027)⁹³ and the NDP (2021-2030)⁹⁴. There have been similar commitments made to a variety of projects of scale which have been outlined in Table 10, as well as other infrastructure projects which are not committed to under the NDP (2021-2030) – such as the Western Railway Corridor – which was originally committed to under the NDP (2007-2013) and Transport 21.

While the inclusion of these infrastructure projects of scale in the NDP (2021-2030) are to be welcomed, it is important to acknowledge that based on the latest updates from TII⁹⁵, it seems that these projects of scale are currently not in the pipeline for immediate delivery as part of the implementation of the NDP (2021-2030), with many of these projects subject to appraisal or at planning stages. This is despite historical commitments under previous NDPs – as documented in Table 10 – and issues such as legacy underinvestment in the region’s infrastructure assets and the relative lack of other future infrastructure projects of scale in the pipeline for delivery in the region, as documented in Sub-Section 5.1.

⁹¹ More details available from TII: https://www.tii.ie/roads-tolling/projects-and-improvements/Major-Active-Projects_MAR2023.pdf

⁹² <https://monaghan.ie/roadtransport/wp-content/uploads/sites/15/2016/12/ConstraintsStudyReport-Final.pdf>

⁹³ <https://assets.gov.ie/37937/12baa8fe0dcb43a78122fb316dc51277.pdf>

⁹⁴ More details available from TII: https://www.tii.ie/roads-tolling/projects-and-improvements/Major-Active-Projects_MAR2023.pdf

⁹⁵ Update description in line with descriptions provided by TII: https://www.tii.ie/roads-tolling/projects-and-improvements/Major-Active-Projects_MAR2023.pdf

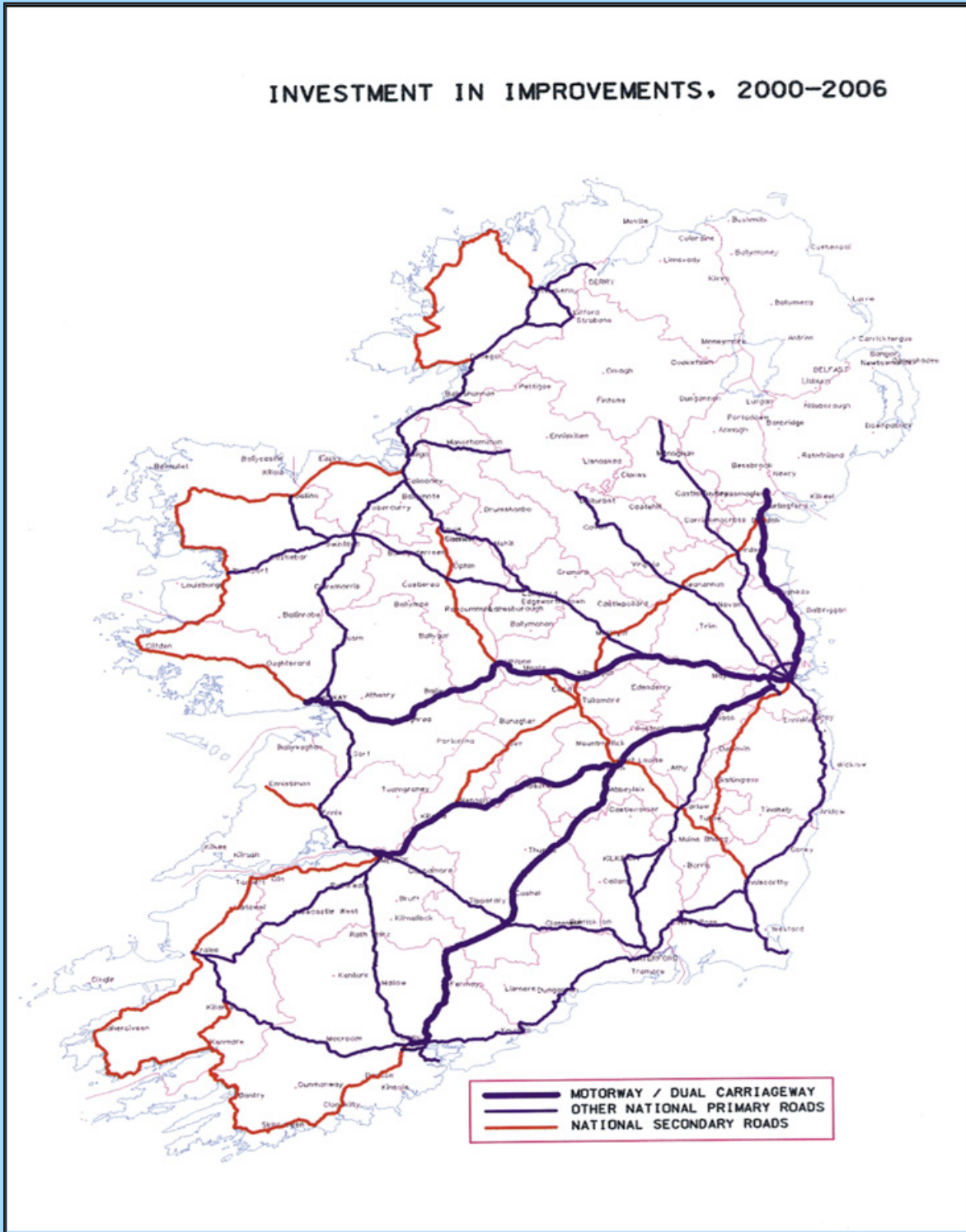
Table 10: Details on other infrastructure projects of scale that are committed to under the NDP (2021-2030) but are yet to be delivered

Infrastructure Project of Scale	Project committed to be delivered, by NDP	Latest Update from TII ⁹⁶
N2 Clontibret to the Border	<ul style="list-style-type: none"> • NDP 2000-2006 • NDP 2007-2013 / “Transport 21” • NDP 2018-2027 • NDP 2021-2030 	Project at planning and design stage. Construction timeframe to be confirmed.
Donegal TEN-T Projects i.e. <ul style="list-style-type: none"> • N15/N13 Ballybofey/Stranorlar Bypass • N56/N13 Letterkenny to Manorcunningham • N14 Manorcunningham to Lifford/Strabane/A5) 	<ul style="list-style-type: none"> • NDP 2000-2006 • NDP 2000-2006 • NDP 2007-2013 / “Transport 21” (i.e. Atlantic Road Corridor) • NDP 2018-2027 • NDP 2021-2030 	Project at planning and design stage. Construction timeframe to be confirmed.
N17 Knock to Collooney	<ul style="list-style-type: none"> • NDP 2000-2006 • NDP 2007-2013 / “Transport 21” (i.e. Atlantic Road Corridor) • NDP 2018-2027 • NDP 2021-2030 	Project at early planning stage. Construction timeframe considered to be post 2026, albeit this is to be confirmed.
N59 Clifden to Maam Cross	<ul style="list-style-type: none"> • NDP 2021-2030 	Project is on hold. Construction timeframe to be determined.
N2 Ardee to South of Castleblaney	<ul style="list-style-type: none"> • NDP 2018-2027 • NDP 2021-2030 	Project at planning and design stage. Construction timeframe to be confirmed.
N3 Virginia Bypass	<ul style="list-style-type: none"> • NDP 2018-2027 • NDP 2021-2030 	Project at early planning stage. Construction timeframe considered to be post 2026, albeit this is to be confirmed.
N4 Carrick on Shannon to Dromod	<ul style="list-style-type: none"> • NDP 2018-2027 • NDP 2021-2030 	Project at early planning stage. Construction timeframe considered to be post 2026, albeit this is to be confirmed.

Source: Northern and Western Regional Assembly

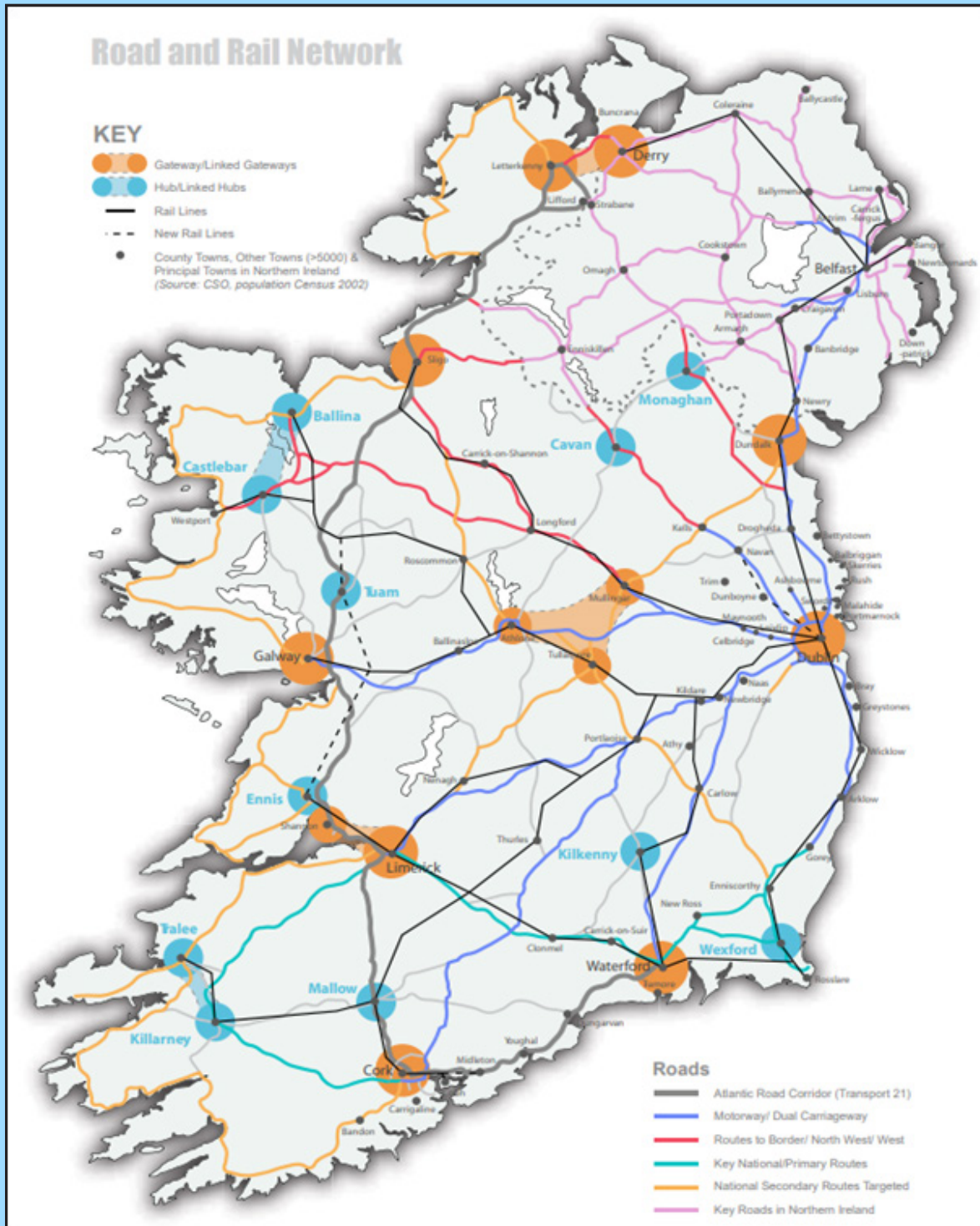
⁹⁶ Update description in line with descriptions provided by TII: https://www.tii.ie/roads-tolling/projects-and-improvements/Major-Active-Projects_MAR2023.pdf

Figure 24: "Road Improvements" earmarked for investment in NDP (2000-2006)



Source: The NDP 2000-2006

Figure 25: Map from NDP (2007-2013)



Source: The NDP 2007-2013

A Policy of Positive Discrimination

6

The Regional Infrastructure Tracker will – amongst other things – inform policymakers of the lack of investment in the infrastructure assets of the Northern and Western Region of Ireland since the base year of the National Planning Framework (NPF). In addition to this, it also highlights how there seems to be a lack of infrastructure projects of scale that are currently in the pipeline for delivery in the region, while providing a sense of infrastructure deficits that exist across the Northern and Western Region of Ireland.

Given the scale of underinvestment in the region’s infrastructure assets, it is unsurprising to see that regional disparities in Ireland have continued to rise in recent times, with these trends likely to worsen unless a significant intervention is delivered. Within this context, it is clear that a new approach is needed in addressing regional imbalances in Ireland and that the revised NPF and the existing NDP (2021-2030) should adopt a policy of “Positive Discrimination” towards the Northern and Western Region of Ireland.

At a high level, a policy of “Positive Discrimination” would involve adopting a regional approach in the implementation of the revised NPF and the NDP (2021-2030). At a high-level, it would involve:

1. Providing an above average level of capital investment – per head of population – towards the infrastructure assets of the Northern and Western Region of Ireland as part of the implementation of the revised NPF and the existing NDP (2021-2030).
2. Reforming how infrastructure project appraisals in Ireland are carried out on projects that are being evaluated for the Northern and Western Region of Ireland.
3. Delivering greater levels of regional and local autonomy in Ireland by providing the 3 Regional Assemblies and Local Authorities a greater role and capacity in delivering infrastructure projects.

The purpose of a policy of “Positive Discrimination” would be to:

- ◊ Deliver on the population targets of the NPF and the Regional Spatial and Economic Strategy (RSES) of the Northern and Western Region of Ireland.
- ◊ Address the sizeable infrastructure deficits which exist in the Northern and Western Region of Ireland, with these deficits particularly evident in the region’s transport network.
- ◊ Reduce regional disparities in Ireland by supporting the ability of the Northern and Western Region to generate agglomeration benefits, allowing the region to provide a credible counterbalance to the growth trajectory of the Greater Dublin Area.
- ◊ Deliver on National Policy Objective (NPO) 1a of the NPF, which seeks to ensure that the projected level of population growth in the Eastern and Midland Region of Ireland is at least matched by that of the Northern and Western and Southern Regions combined.

Without a policy of “Positive Discrimination”, the Northern and Western Region of Ireland will never be able to deliver on the vision of regional balance as aspired to in the NPF and the RSES. Failure to do so will result in continued overdevelopment in the Greater Dublin Area – undermining the quality of life of its residents through factors such as excessive demand on public services, higher housing costs and urban sprawl – while also undermining the growth potential of more rural oriented regions such as the Northern and Western Region of Ireland. Adopting a policy of “Positive Discrimination” in the revised NPF and the existing NDP (2021-2030) would be achieved by undertaking the following 5 specific steps, namely:

1) Deliver 13 “Priority Infrastructure Projects” in the Northern and Western Region of the island of Ireland

: As a starting point, the Department of Public Expenditure, NDP Delivery and Reform should begin allocating appropriate levels of funding to prioritise the delivery of infrastructure projects of scale in the Northern and Western Region of the island of Ireland that are already committed to in the existing NDP (2021-2030). In conjunction to this, the Department of Public Expenditure, NDP Delivery and Reform should also support a number of key infrastructure projects of scale in the region, which are not committed for delivery under the NDP (2021-2030).

Such funding should aim to ensure that these projects are prioritised in the implementation of the NDP (2021-2030), ensuring they are efficiently delivered from the appraisal stages of the project to completion. In this regard, a policy of “Positive Discrimination” in the implementation of the NDP (2021-2030) should prioritise the delivery of the following 13 “Priority Infrastructure Projects”. It should be noted that these projects have not been ranked in order of priority, with the latest cost estimates on these projects outlined where possible.

For the 13 “Priority Infrastructure Projects” that have costings available – or where costings are currently possible – it is estimated that delivering these projects would – at minimum – cost between €4.8 billion and €6.8 billion over their appropriate delivery timeframes, with this range taking into account price inflation from the date of the cost estimate in question.⁹⁷ It is important to note that these estimates are likely to change depending on inflation in construction costs, delays associated with planning and appraisal processes, technology developments and other factors associated with the delivery of sizable infrastructure projects.

Nevertheless, the delivery of these projects clearly represent significant value for money for the State, simultaneously supporting the delivery of a number of policy frameworks – such as the NPF, the RSES and the Climate Action Plan – addressing sizeable infrastructure deficits across a number of counties while supporting the development of the all island economy. Notably, the collective cost of their delivery is considerably lower compared to the initial cost estimate for the Dublin Metro⁹⁸ (i.e. €9.5 billion). Prioritizing the delivery of these infrastructure projects of scale is based on a number of reasons, namely:

- ◊ These infrastructure projects are aligned with a number of “Regional Policy Objectives” of the RSES and would assist in addressing the weak urban structure of the Northern and Western Region of Ireland; a strategic challenge which is acknowledged in the NPF and the RSES.
- ◊ These infrastructure projects would support the population targets for the Galway City Metropolitan Area, the 3 Regional Growth Centres of Letterkenny, Sligo Town and Athlone and the 8 Key Towns of the Northern and Western Region of Ireland.
- ◊ These infrastructure projects would support the development of agglomeration benefits in the Northern and Western Region of the island of Ireland, allowing the region to provide a more credible counterbalance to the growth trajectory of the Greater Dublin Area.
- ◊ These projects were considered for prioritisation by a sub-set of the elected members and the executive of the Northern and Western Regional Assembly in advance of the Assembly’s meeting with the then Taoiseach⁹⁹ in December 2023 and discussions thereafter.
- ◊ Several of these infrastructure projects have been committed for delivery in a number of NDPs, with some of these projects originally committed for delivery as far back as the NDP (2000-2006).
- ◊ Some of these projects are associated with significant safety issues and have so for a considerable period of time. For example, the existing N17 Knock to Collooney – which has been committed for development in the NDP (2000-2006), Transport 21, the NDP (2018-2027) and the NDP (2021-2030) – has a collision rating which is twice the national average and which has traffic volumes that exceed efficient operating capacity according to the latest updates from TII.¹⁰⁰

⁹⁷ Prices adjusted to reflect using the CSO’s Consumer Price Index (CPI)

⁹⁸ <https://www.oireachtas.ie/en/press-centre/press-releases/20230704-committee-of-public-accounts-pac-warns-cost-of-planned-dublin-metrolink-project-must-not-exceed-9-5bn/>

⁹⁹ <https://www.nwra.ie/news/nwra-briefs-taoiseach-leo-varadkar-on-obstacles-to-regional-development/>

¹⁰⁰ [Major-Active-Projects_MAR2023.pdf \(tii.ie\)](#)

Table 11: Priority infrastructure projects in the Northern and Western Region of the island of Ireland

Infrastructure Project of Scale	Latest cost estimate (m = millions of €) ¹⁰¹
N2 Clontibret to the Border Road Scheme	€280m to €340m ¹⁰²
Donegal TEN-T Projects i.e. <ul style="list-style-type: none"> N15/N13 Ballybofey/Stranorlar Bypass N56/N13 Letterkenny to Manorcunningham N14 Manorcunningham to Lifford/Strabane/A5 link) 	€785m to €840m ¹⁰³
The Atlantic Technological University's Library, IT and Education Building (Letterkenny campus)	€25m to €75m ¹⁰⁴
N6 Galway City Ring Road Scheme	€500m to €1 billion ¹⁰⁵
Western Rail Corridor Phase 2 + 3 (i.e. rail line between Athenry and Claremorris)	€400m to €600m ¹⁰⁶
Western Rail Corridor Phase 4 (i.e. rail line between Claremorris and Collooney)	€412m ¹⁰⁷
N17 Knock to Collooney Road Scheme	€600m ¹⁰⁸
Port of Galway Redevelopment	€50m to €100m ¹⁰⁹ (estimated exchequer contribution only)
The Atlantic Technological University's STEM Building (Galway City campus)	€25m to €75m ¹¹⁰
Dual track lines and electrification of lines between Athlone and Galway City	€800m to €1.3 billion ¹¹¹
A5 Road Scheme	€600m ¹¹² (i.e. Irish Government's contribution only).
Expansion of Ulster University's Magee campus (Derry City) to 7,500 students.	€0m to €450m (i.e. depending on Irish Government's contribution) ¹¹³
Ireland West Airport Knock's (IWAK) prioritisation of investment into critical safety, security, operational and capital infrastructure for the future ongoing maintenance and sustainable development of the Airport up to 2030. ¹¹⁴	€45 m

Source: Northern and Western Regional Assembly using data from "MyProjectIreland Tracker" (May 2024)

¹⁰¹ Estimates based on the prices at the time of the publication in question.

¹⁰² https://www.tii.ie/roads-tolling/projects-and-improvements/Major-Active-Projects_MAR2023.pdf

¹⁰³ https://www.tii.ie/roads-tolling/projects-and-improvements/Major-Active-Projects_MAR2023.pdf

¹⁰⁴ Based on consultations with the Atlantic Technological University and includes capital costs only.

¹⁰⁵ <https://www.gov.ie/en/press-release/7b92d-minister-donohoe-launches-updated-project-ireland-2040-progress-tracker/>

¹⁰⁶ <https://www.gov.ie/en/consultation/4d4f2-all-island-strategic-rail-review-public-consultation-for-strategic-environment-assessment/>

¹⁰⁷ Based on report from Dr John Bradley and West-on-Track: <http://www.westontrack.com/bradley-report-wrc24.pdf>

¹⁰⁸ Costings not available via TII but discussions in the Oireachtas suggests that development of the project would cost around €600 million: <https://www.oireachtas.ie/en/debates/debate/seanad/2023-05-18/8/?highlight%5B0%5D=n17&highlight%5B1%5D=knock&highlight%5B2%5D=collooney&highlight%5B3%5D=600&highlight%5B4%5D=million&highlight%5B5%5D=n17>

¹⁰⁹ Does not represent the estimated overall cost of the relocation of the Port, with €50m to €100m range based on the potential use of exchequer resources from funds such as the Urban Regeneration Development Fund. Based on consultations with the Port of Galway.

¹¹⁰ Based on consultations with the Atlantic Technological University and includes capital costs only.

¹¹¹ <https://www.gov.ie/en/consultation/4d4f2-all-island-strategic-rail-review-public-consultation-for-strategic-environment-assessment/>

¹¹² <https://www.gov.ie/en/press-release/2c23e-unprecedented-funding-of-over-800m-for-shared-island-investment-priorities-including-a5-road/>

¹¹³ Official "capital cost" estimates from the Department of Economy shows that increasing the campus size to 7,500 students would cost £385 million (April 2024), but to what degree the Irish government contributes to this remains to be seen at the time of writing. Cost range of £0 to £385 million included to take into account that the Irish Government could contribute no funding to the expansion or – at most – would pay for the entire expansion. Paying for the entire expansion would be highly unlikely but such a range provides some sense of the capital cost of increasing the Ulster University Magee campus size to 7,500 students, assisting the University towards the stated goal of having 10,000 students in the campus as per the "New Decade, New Approach" agreement. Estimate has been converted to euros based on the £/€ exchange rate at the time of the cost estimate using Bank of England data: <https://www.bankofengland.co.uk/statistics/exchange-rates>

¹¹⁴ Assuming investment aid of 90% based on consultations with the senior management of IWAK.

Whilst there are a number of roads projects which the Assembly consider to be critical in delivering effective regional development – as per the NPF and the RSES – and enabling the Northern and Western Region to reach its full potential, it is essential that the “Regional Infrastructure Tracker” is not interpreted as a perpetuation of car dominated travel. The improvement of strategic transport corridors – which are clearly outlined here as priority – will not only serve to recalibrate the existing inequalities of the network, particularly North of the Dublin – Galway Line, but will introduce a host of other benefits including, but not limited to:

- The safe and efficient movement of people and goods, with increased inter-urban average speeds across significant sections of the National Road Network identified as substandard within the National Roads 2040.
- Targeted by-passes of urban centres – such as Letterkenny, Ballybofey – Stranorlar, Carrick on Shannon – further consolidating compact settlement growth and climate resilience through innovative design.
- New facilities for walking and cycling, as well as time reliable roads based public transport and EV charging points.
- Multi-modal interconnection hubs, including park and ride facilities.

If the State is to effectively deliver on the ambitions which have been outlined in the Climate Action, then solutions for all regions of Ireland must be delivered as soon as possible. All of the road schemes listed within this document can contribute towards reducing carbon emissions and increasing the number of citizens utilising a multitude of modes – in particular public transport via bus – which is the only viable option in the Border Counties of Donegal, Cavan and Monaghan, where the majority of road schemes listed have been stalled since the NDP (2000-2006). In order to bridge the gap created by decades of underinvestment on major projects, it is imperative that these types of projects are delivered, particularly given that the Northern and Western Region of Ireland is now amongst Europe’s worst in terms of transport infrastructure provision, as per the European Commission’s “Regional Competitiveness Index”.

2) Increase the level of capital expenditure committed to under the NDP (2021-2030) in order to develop other infrastructure projects of scale in the Northern and Western Region of Ireland: The Department of Public Expenditure, NDP Delivery and Reform should begin allocating appropriate levels of funding to:

- ◇ Support specific rail projects, relevant reviews and feasibility studies that have been outlined in the RSES of the Northern and Western Region – through a variety of RPOs – and which have been outlined in the consultation on the All-Island Rail Review,¹¹⁵ specifically:
 - » Enhancing the capacity of the Sligo to Dublin rail line, in line with RPO 6.15 of the RSES.
 - » Developing a new rail line between Letterkenny and Derry City, as outlined in the consultation on the All-Island Rail Review.
 - » Reinstating the railway from Portadown, Armagh, Cavan, and Mullingar and restoring the rail line between Derry and Portadown, as outlined in the consultation on the All-Island Rail Review.
 - » Improving the rail line between Athlone and the Key Towns of Mayo, as outlined in the consultation on the All-Island Rail Review.
- ◇ Improve the infrastructure and capacity of the seaports and harbours of the Northern and Western Region of Ireland, with a specific focus on:
 - » Enhancing the port infrastructure of the Port of Galway, Killybegs Harbour, and Ros An Mhíl Harbour, so that these ports can capitalise on the opportunities associated with the offshore wind energy sector and the blue economy.
 - » Investing in data and insight-driven technology and sensors, allowing the Northern and Western Region’s seaports to become “Smart Ports”.
 - » Examining the feasibility for pursuing the delivery of Killybegs Port as part of the EU’s TEN-T Comprehensive ports.
 - » Providing for safe access by sea for island communities – including but not limited to – the provision of improved pier infrastructure on Inis Oír and Inis Meáin in the Aran Islands and at Machaire Rabhartaigh and the continued provision of high quality passenger ferry vessels for Oileán Thoraí, in line with RPO 6.25 of the RSES.
- ◇ Support the infrastructure and services of Donegal Airport by:
 - » Enhancing the level of capital and operational funding provided to Donegal Airport for noneconomic measures – such as air traffic control, police, customs, security and fire services – through the Regional Airport Programme (RAP).
 - » Improving the level of capital investment provided to Donegal Airport for economic measures under the CAPEX scheme of the RAP.
 - » Supporting and maintaining the current Public Service Obligation (PSO) for Donegal Airport.
- ◇ Deliver transport projects that have been outlined in the existing Galway Transport Strategy and projects that will be outlined in Local Transport Plans in the Northern and Western Region of Ireland.
- ◇ Provide more safe cycling routes and enhance pedestrian facilities across settlements of all scale in the Northern and Western Region of Ireland, particularly in the Galway City Metropolitan Area, the “Regional Growth Centres” of Sligo Town, Letterkenny and Athlone and the designated “Key Towns” of the region, as well rural towns and villages in the region.
- ◇ Enhance the reliability and connectivity of inter-regional and intra-regional bus services that connects the key settlements of the Northern and Western Region of Ireland.
- ◇ Deliver more “Fast” and “High-Powered” EV charge points at strategic and accessible locations across the Northern and Western Region of Ireland.
- ◇ Expand the Local Link Rural Transport Programme throughout rural communities in the Northern and Western Region of Ireland.
- ◇ Improve the inter-regional and intra-regional national road network that connects the key settlements

¹¹⁵ <https://www.gov.ie/en/consultation/4d4f2-all-island-strategic-rail-review-public-consultation-for-strategic-environment-assessment/#:~:text=The%20All%2DIsland%20Strategic%20Rail%20Review%20was%20launched%20in%20April,on%20the%20island%20of%20Ireland>

of the Northern and Western Region of Ireland, by delivering the outstanding road projects documented in RPOs 6.6, 6.7 and 6.8 ¹¹⁶ of the RSES – particularly those on the TEN-T comprehensive network – and by maintaining and enhancing the regional and local road network of the region. Specific projects in this regard have been outlined in Appendix A.

- ◊ Provide a safe, secure and reliable electricity network for the Northern and Western Region of Ireland as it transitions to a low carbon economy.
- ◊ Invest in the sustainable management of water and other environmental resources of the Northern and Western Region of Ireland.
- ◊ Invest in building out the gas supply network into the Northern and Western Region of Ireland, particularly where gaps have been identified in counties such as Sligo, Roscommon, Donegal and Leitrim.

3) Reform infrastructure appraisals in a manner that reflects the comparative disadvantage of the Northern and Western Region of Ireland, having regard to legacy underinvestment and statutory policy frameworks.

For example, an important element of infrastructure project appraisals is the use of Cost Benefit Analyses (CBAs) in determining the economic viability of a project. Considering the importance of region's populations in calculating the stated benefits of an infrastructure project in any CBA, it is clear that projects based in rural oriented regions – such as the Northern and Western Region of Ireland – are naturally disadvantaged compared to similar projects that would be located in more urban oriented regions, such as the Greater Dublin Area.

All things equal in terms of projects, regions with a larger population are naturally better positioned to generate relatively higher levels of socio-economic benefits compared to regions with relatively smaller populations. As such, a CBA is more likely to approve an infrastructure project in a more urban oriented region compared to a rural oriented region, which will inevitably restrict efforts to overcome the Northern and Western Region's infrastructure deficits. Furthermore, CBAs can be highly restrictive by design, with stated costs and benefits generally focused on numerical matters and not taking into account wider policy, environmental and social factors, such as the need to support the delivery of “effective regional development” in line with the vision and objectives of the NPF and the RSES. Although CBAs are not the only consideration in determining the viability of a project, these financial appraisals play a crucial role in determining the level of infrastructure projects that can be delivered in the Northern and Western Region of Ireland. On this basis, the Department of Public Expenditure, NDP Delivery and Reform should examine how their infrastructure project appraisals could be reformed in manner which takes into account the population size, structure and policy frameworks associated with rural oriented regions such as the Northern and Western Region of Ireland.

¹¹⁶ Specific road projects in question outlined in Appendix A of this submission.

4) Ensure more than half of the European Regional Development Fund (ERDF) is ringfenced for the Northern and Western Region of Ireland, for the next EU funding period (2028-2035): Under the current EU funding period of 2021-2027, Ireland’s ERDF allocation amounts to around €396 million.¹¹⁷ When national co-financing is included, the total allocation for schemes under the ERDF in Ireland will amount to just over €853 million over this time period. The focus of the ERDF for the funding period of 2021-2027 will be on making progress under the following stated policy objectives (PO), namely:

- ◊ “PO 1: A smarter Europe”, which will support innovative and smart economic transformation.
- ◊ “PO 2: A greener, low-carbon Europe”, which will promote clean and fair energy transition.
- ◊ “PO 5: Europe closer to citizens” which will support sustainable and integrated development of urban, rural and coastal areas through local initiatives.

Of the €853 million that will be invested under the schemes supported by the ERDF for this funding period, €217 million will be invested in the Northern and Western Region of Ireland.¹¹⁸ Some of this funding will support the research capacity and infrastructure of higher education and research assets in the Atlantic Technological University and the University of Galway, with previous allocations under the ERDF for the EU funding period of 2014-2020 supporting infrastructure projects such as the Salmon Weir Pedestrian and Cycle Bridge in Galway City.¹¹⁹

Given the scale of infrastructure deficits in the region and considering the significant economic challenges being experienced by the Northern and Western Region of Ireland – as evident by the European Commission’s decision to downgrade the region’s economy from a “More Developed Region” to a “Transition Region” – the Assembly believes that future allocations of the ERDF should be predominantly ringfenced towards this region. The allocation of funding has the potential to assist in overcoming the region’s sizable infrastructure deficits and addressing some of its economic challenges.

Such an allocation would be aligned with the text documented in Article 176 of the Treaty on the Functioning of the European Union (TFEU), which states that:

*“the European Regional Development Fund (ERDF) is intended to help to redress the main regional imbalances in the Union. Pursuant to that Article and the second and third paragraphs of Article 174 TFEU, the ERDF is to contribute to reducing disparities between the levels of development of the various regions and the backwardness of the least-favoured regions ...”.*¹²⁰

Given that the Northern and Western Region of Ireland is the only NUTS 2 Region in Ireland to be classified as a “Transition Region” – as well as being defined as a “Lagging Region” as per the European Parliament’s Committee on Regional Development¹²¹ – it seems logical that the majority of funding under the ERDF would be ringfenced for the region for the next EU funding period of 2028-2035, as a means of addressing regional imbalances, particularly in the area of infrastructure.

¹¹⁷ <https://www.gov.ie/en/press-release/6f4c2-minister-mcgrath-secures-government-approval-850m-european-regional-development-fund-erdf-programmes/>

¹¹⁸ <https://www.nwra.ie/northern-and-western-regional-programme-2021-2027/#:~:text=EU%20Co%20Funded%20Regional%20Programmes,Ireland%20and%20the%20European%20Union>

¹¹⁹ <https://www.nwra.ie/news/official-opening-of-the-salmon-weir-pedestrian-and-cycle-bridge-in-galway/#:~:text=Today%20the%20Salmon%20Weir%20Pedestrian,Corrib%20in%20over%2030%20years>

¹²⁰ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32021R1058>

¹²¹ [https://www.europarl.europa.eu/RegData/etudes/STUD/2020/652215/IPOL_STU\(2020\)652215_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/STUD/2020/652215/IPOL_STU(2020)652215_EN.pdf)

5) Examine how a process of regional decentralisation can take place in Ireland, ensuring greater regional autonomy can be implemented in Ireland from a policy perspective: To achieve this, the Oireachtas could approve the development of a Citizens Assembly which would examine how greater levels of regional autonomy could be implemented in Ireland. In this case, the Citizens Assembly would examine the possible merits and challenges associated with regional decentralization, which according to the OECD¹²² refers to the transfer of powers and responsibilities from the central government level to elected authorities at the subnational level, which in Ireland's case would be the 3 Regional Assemblies and the Local Authorities. In this regard, this Citizens Assembly could consider the three defined dimensions of regional decentralization from the OECD – namely political, administrative and fiscal – and examine how decentralisation could take place in Ireland considering the OECD's ten guidelines on decentralisation.¹²³ In the meantime, and until an initiative such as a Citizens Assembly to examine in detail how effective Regional Government can be delivered, some alternatives could be considered as interim measures, these include:

- ◆ A Ministry for “Regional Development” which would include a Government Department with a significant budget for delivering key regional priorities.
- ◆ A cross sectoral task force, which is afforded a remit to address the long standing, significant gap in spatial equity across the State, whether it be in health care, educational provision, and transport infrastructure.
- ◆ An initiative combining the Regional Assemblies, Local Authorities, industry leaders and educational bodies to create an initiative similar in scope to the Northern Powerhouse in the UK.

The provision of greater regional autonomy in Ireland could not be more important given that regional inequalities are rising and considering the associated benefits of greater levels of regional autonomy in developed economies. These benefits include improving citizen participation in the democratic process – by bringing the activities of government closer to its citizens – supporting political stability and placing greater accountability on regional and local policymakers, while also supporting efficiency gains as public services can be regionally tailored to better meet the needs of local communities. Moreover, the OECD have found that greater levels of regional autonomy – in the form of fiscal powers – is positively associated with greater levels of regional economic activity – specifically in terms of GDP, public investments and education outcomes – while revenue decentralisation appears to be even more strongly associated with income gains and smaller regional economic disparities.

Regional inequalities in Ireland have also risen at a time when subnational government expenditure – as a percentage of total government expenditure – has fallen notably, with Ireland regarded as one of the most centralised government systems in the OECD¹²⁴. It should be noted that subnational government expenditure – as a percentage of total government expenditure – is considered a reasonable indicator for regional autonomy, albeit it would not take into account other factors such as – but not limited to – flexibility in funding decisions, governance structures and shared responsibilities between central and subnational government. Since the 2000s, subnational government expenditure in Ireland – as a percentage of total government expenditure – has dropped from a recent high of 41 per cent in 2004 to 10 per cent in 2022, which represents the latest available figures from the OECD.¹²⁵ In 2022, Ireland's subnational government expenditure – as a percentage of total government expenditure – was notably smaller in comparison to other countries in Europe, particularly when compared to Denmark (64%), Sweden (49%), Finland (41%), Norway (33%) and the Netherlands (29%). A similar situation arises when examining taxation autonomy. For example, the percentage of tax revenue which was collected by subnational government authorities in Ireland amounted to 3 per cent in 2022, which was much lower relative to other European countries in the OECD.

¹²² https://www.oecd-ilibrary.org/sites/g2g9faa7-en/1/1/3/index.html?itemId=/content/publication/g2g9faa7-en&_csp_666662614dda882fd41f760d9a0e

¹²³ https://www.oecd-ilibrary.org/urban-rural-and-regional-development/making-decentralisation-work_g2g9faa7-en

¹²⁴ <https://www.oecd.org/gov/gov-at-a-glance-2021-ireland.pdf>

¹²⁵ <https://www.oecd.org/tax/federalism/fiscal-decentralisation-database/>

Conclusion

7

Despite the exceptional growth of the Irish economy in recent years – and an abundance of exchequer returns – the scale of underinvestment in the infrastructure network of the Northern and Western Region of Ireland has been notably stark and plain to see across the region, with these deficits holding back the development of the region’s economy and undermining our transition to a low carbon society.

Using a wide range of up-to-date data sources, the “Regional Infrastructure Tracker” provides a sense of the scale of underinvestment in the infrastructure assets of the Northern and Western Region of Ireland, with underinvestment acutely evident in the distribution of investments associated with public sector tenders and in funding allocations in investment programmes related to national roads, higher education, research and urban regeneration.

This legacy of underinvestment is having far-reaching consequences on the region, contributing to sizeable infrastructure deficits across a host of areas – including but not limited to – transport, health, social housing, the electrical grid, green infrastructure, surface water and wastewater infrastructure and broadband. The scale of these infrastructure deficits is clearly undermining the delivery of a wide range of “National Strategic Outcomes” and “National Policy Objectives” in the NPF. As well as contributing to sizeable infrastructure deficits in the Northern and Western Region of Ireland, legacy underinvestment in the region’s infrastructure assets is clearly contributing to rising regional disparities in Ireland, with such deficits undermining the ability of the region to attract high valued jobs, talent and investment compared to other regions in Ireland.

In doing so, these infrastructure deficits are restricting the development of the region’s economy, affecting the delivery of public services, while undermining efforts to support the delivery of important targets outlined in the National Planning Framework (NPF),¹²⁶ the Regional Spatial and Economic Strategy (RSES)¹²⁷ of the Northern and Western Region and the Climate Action Plan.¹²⁸

Such challenges are compounded by the fact that there seems to be a relative lack of infrastructure projects of scale which are currently in the pipeline as part of the implementation of the National Development Plan (2021-2030), with the delivery of these major projects central to addressing these deficits and overcoming rising regional inequalities in Ireland. While there are several other infrastructure projects of scale which are committed to be delivered in the Northern and Western Region of Ireland – as per the text of the NDP (2021-2030) – many of them were originally committed for delivery as far back as the NDP (2000-2006), with the latest updates suggesting that they will not be delivered in the short to medium term.

¹²⁶ <https://www.npf.ie/wp-content/uploads/Project-Ireland-2040-NPF.pdf>

¹²⁷ <https://www.nwra.ie/pdfs/NWRA-RSES-2020-2032.pdf>

¹²⁸ <https://www.gov.ie/en/publication/67104-climate-action-plan/>

Taking into account all of these factors, it is clear that a new approach is needed in addressing sizeable regional infrastructure deficits and growing regional disparities in Ireland. To achieve this, the revised NPF and the existing NDP (2021-2030) should adopt a policy of “Positive Discrimination” towards the Northern and Western Region of Ireland. At a high level, a policy of “Positive Discrimination” would involve adopting a regional approach in the implementation of the revised NPF and the NDP (2021-2030), which would specifically involve undertaking the following 5 steps:

Key Findings

- ✦ Deliver 13 “Priority Infrastructure Projects” in the Northern and Western Region of the island of Ireland.
- ✦ Increase the level of capital expenditure committed to under the NDP (2021-2030) in order to develop other infrastructure projects of scale in the Northern and Western Region of Ireland.
- ✦ Reform infrastructure appraisals in a manner that reflects the comparative disadvantage of the Northern and Western Region of Ireland, having regard to legacy underinvestment and statutory policy frameworks.
- ✦ Ensure more than half of the European Regional Development Fund (ERDF) is ringfenced for the Northern and Western Region of Ireland, for the next EU funding period (2028-2035).
- ✦ Examine how a process of regional decentralisation can take place in Ireland, ensuring greater regional autonomy, as well as a significantly revised structure to enable regional delivery can be implemented in Ireland from a policy perspective.

Without a policy of “Positive Discrimination”, the Northern and Western Region of Ireland will never be able to deliver on the vision of effective regional development – as aspired to in the NPF and the RSES – while the region will struggle to reduce carbon emissions in line with the targets set out in the Climate Action Plan. Failure to engrain this type of regional approach into the implementation of the revised NPF and the NDP (2021-2030) will inevitably lead to continued overdevelopment in the Greater Dublin Area – undermining the quality of life of its residents through factors such as excessive demand on public services, higher housing costs and urban sprawl – while also undermining the potential of more rural oriented regions such as the Northern and Western Region of Ireland.



Appendix

RPO 6.6

In accordance with National Development Plan investment commitments to bring the following schemes through planning/design/construction, the following projects shall be delivered to an appropriate level of service in the short term and in any case by 2027 having regard to the standard in the NPF of an average inter-urban speed of 90KPH:

- ◆ A5 Road Development
- ◆ N4 Collooney to Castlebaldwin
- ◆ N5 Ballaghaderreen to Scramogue and Turlough to Westport
- ◆ N6 Galway City Ring Road
- ◆ N56 Dungloe to Glenties and Mountcharles to Inver
- ◆ N59 Moycullen Bypass.

RPO 6.7

In accordance with National Development Plan investment commitments to progress the following schemes through pre-appraisal and early planning, the following projects shall be progressed through pre-appraisal and early planning in the short term and shall thereafter proceed to construction and be delivered to an appropriate level of service within the lifetime of the RSES:

- ◆ N2 Clontibret to the Border connecting to the A5
- ◆ N2 Ardee to south of Castleblaney
- ◆ N3 Virginia Bypass
- ◆ N4 Carrick on Shannon to Dromod
- ◆ N13 Ballybofey Stranorlar Bypass
- ◆ N13/N14/N56 Letterkenny Bypass and Dual Carriageway to Manorcunningham
- ◆ N14 Manorcunningham to Lifford
- ◆ N17 Knock to Collooney.

RPO 6.8

The delivery of the following projects shall be pursued, in consultation with and subject to the agreement of TII, through pre-appraisal, early planning and to construction as priority projects to be delivered to an appropriate level of service in the medium-term.

- ◆ N3 North of Kells to Enniskillen, via Cavan and the A509 in Fermanagh
- ◆ N5/N26/N58 Mount Falcon to Swinford, Castlebar East to Bohola Project
- ◆ N13 Manorcunningham to Bridgend/Derry
- ◆ N13 Stranorlar to Letterkenny
- ◆ N15 Sligo to Bundoran
- ◆ N15 Stranorlar to Lifford
- ◆ N16 Sligo to Blacklion
- ◆ N53 Dundalk to N2 at Carrickmacross
- ◆ N54/A3 Cavan to Monaghan Town
- ◆ N55 Cavan Town to Athlone
- ◆ N56 Inver to Killybegs
- ◆ N59 Upgrade (including the N59 Oughterard Bypass and the N59 Clifden to Oughterard Scheme)
- ◆ N61 Athlone to Boyle improvement
- ◆ N63 Longford to M17 at Annagh (Junction 18).



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