# Ireland's Construction Landscape, Challenges and Prospects

## Presentation to Irish Concrete Federation

05 November 2025

The better the question. The better the answer. The better the world works.

EY Parthenon

Shape the future with confidence

1

- What are the key pressing issues dominating the building and construction landscape in 2025?

2

- Irish economic performance and prospects

3

- Composition of construction sector
- Recent performance and Prospects
- Sentiment

4

- Competitiveness
- Infrastructure and the NDP

5

- Housing targets
- The delivery of apartments

# Issues dominating the building and construction landscape in 2025

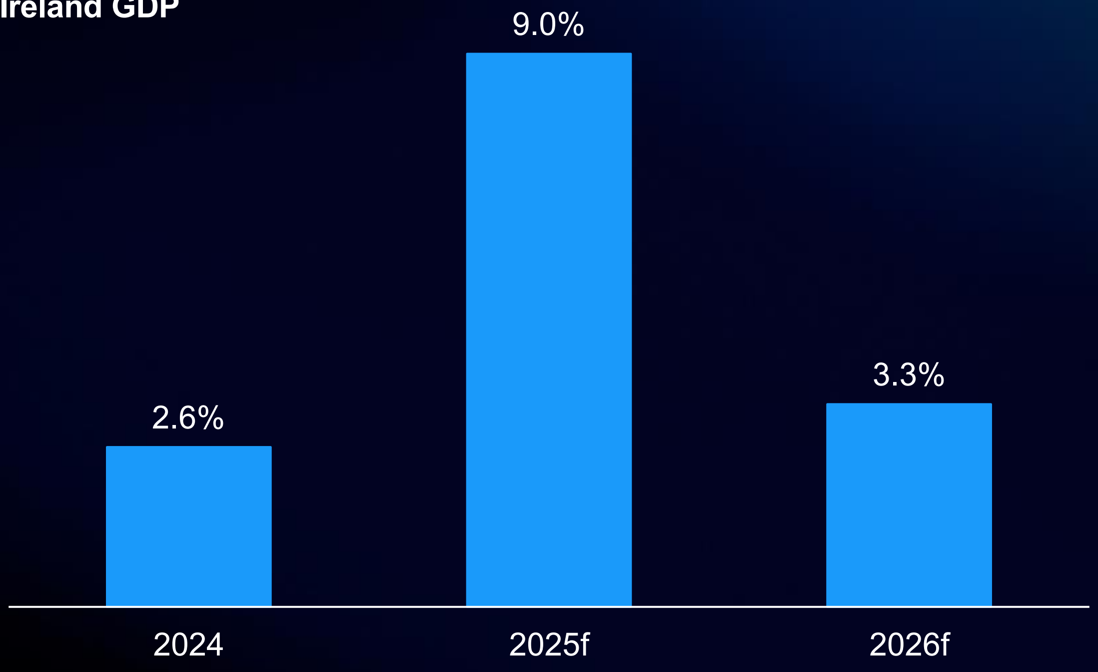
| | | | |
|---|---|---|---|
| Record need – strong population and high inward migration | Planning, Judicial Reviews | Over regulation “Gold-plated” EU regulations “Going beyond what is required” | Infrastructure backlog (water, electricity) to bring homes to market |
| The supply of zoned and serviced land | Viability of apartment schemes in urban areas | Overreliance on the State for housing and need for more private sector investment | Retrofitting homes and delivering climate change targets |
| Capacity to scale up to deliver higher housing targets | Dereliction and vacancy | Construction costs remain elevated | Lack of pipeline of public tenders |
| Delays in funding the AHB sector, available equity more generally | Rent regulations, yet record rents | Rising house prices impacting affordability for FTBs | Off-site construction and digitalisation of projects plus low levels of R&D |

While also acknowledging the multitude of measures, initiatives and supports that the Government have introduced to support housing delivery, viability and affordability over recent years

# Irish Economic Growth in Prospect

Trade policies and heightened geopolitical tensions shaping the economic outlook

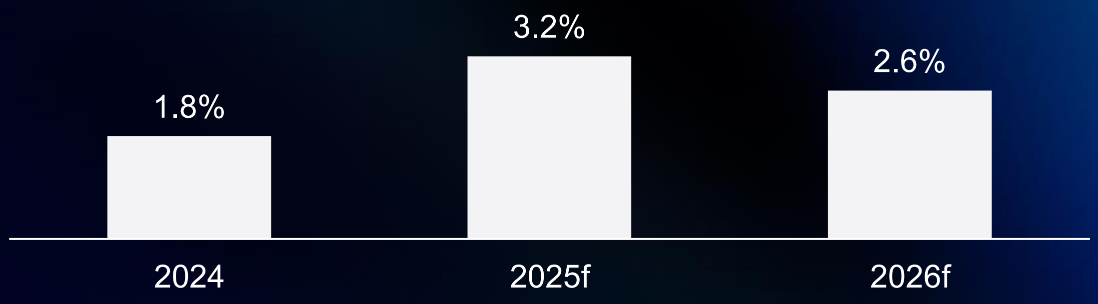
**Ireland GDP**




(Gross Domestic Product, annual change, constant prices)

Source: EY Economic Eye

**Domestic Economy**




(Modified Domestic Demand, annual change, constant prices)

Source: EY Economic Eye

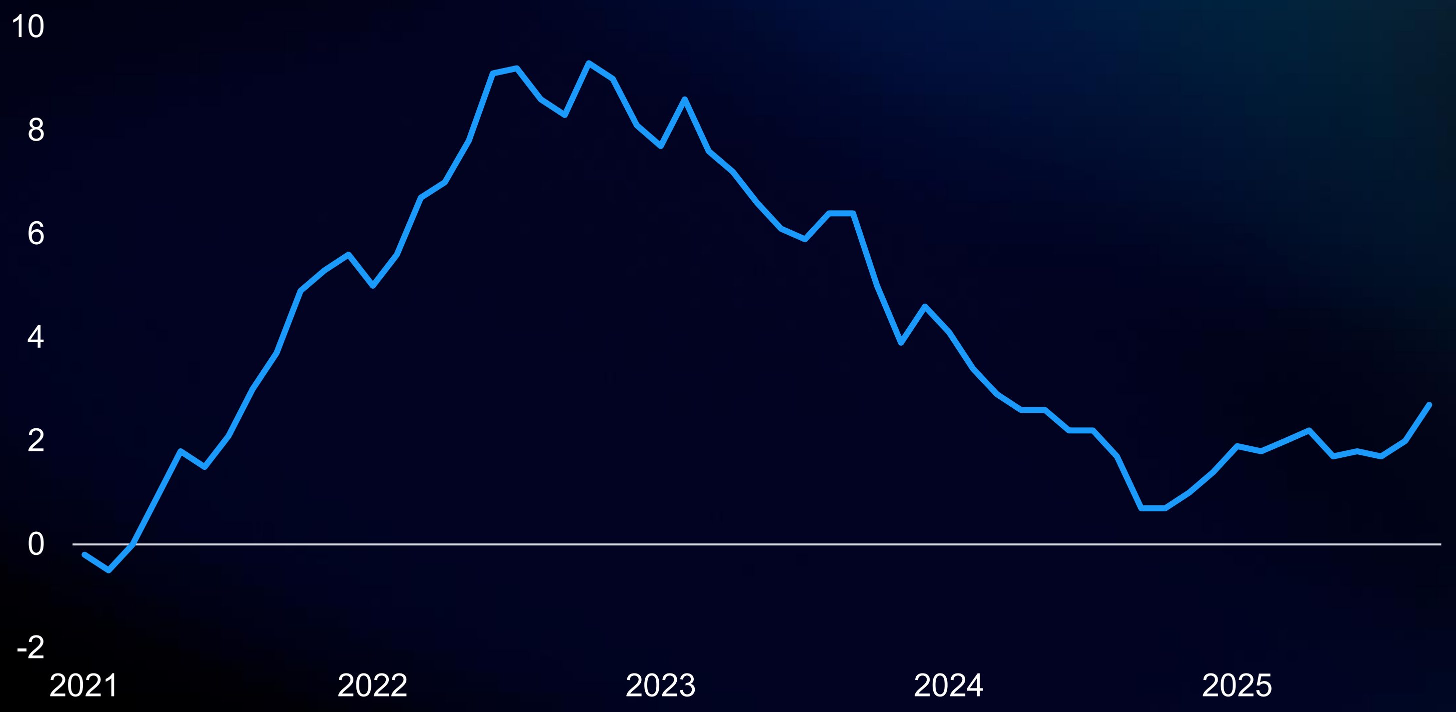
- Front-loading by the pharma sector buoyed exports in H1 2025 in advance of tariffs being applied
- Economy facing a trade shock from a position of strength
- Policies needed to shore up competitiveness and build resilience more than ever

Risks

- Bottlenecks at home – loss of competitiveness
- Uncertainty has abated somewhat but risk of global trade and geopolitical tensions – implications for exports, investment and employment

# Inflation around Target, ECB on Hold

**Ireland Consumer Price Index**

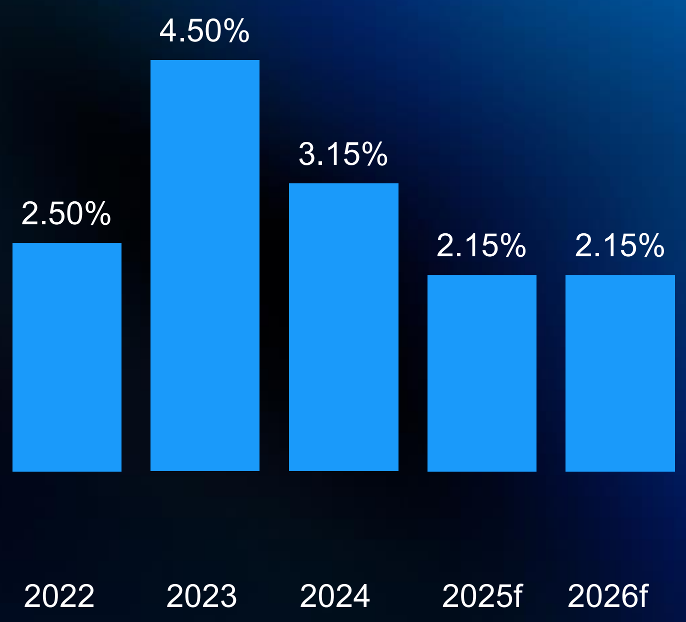



(Annual change)
Source: CSO

**Inflation expected to average 2% in 2025 and 2026**

Broad-based inflationary pressures have eased, but some pockets of inflationary pressures remain (e.g., food)

**Interest Rate Outlook**




(ECB Refi, end year)
Source: EY Economic Eye

Interest rates have been reduced over the course of 2024 and four times in 2025, expect ECB to keep interest rates unchanged throughout 2026



EY Parthenon

# Sectoral employment: Record 2,818,100 people at work – a confidence factor

**Employment Forecast**

**2025**

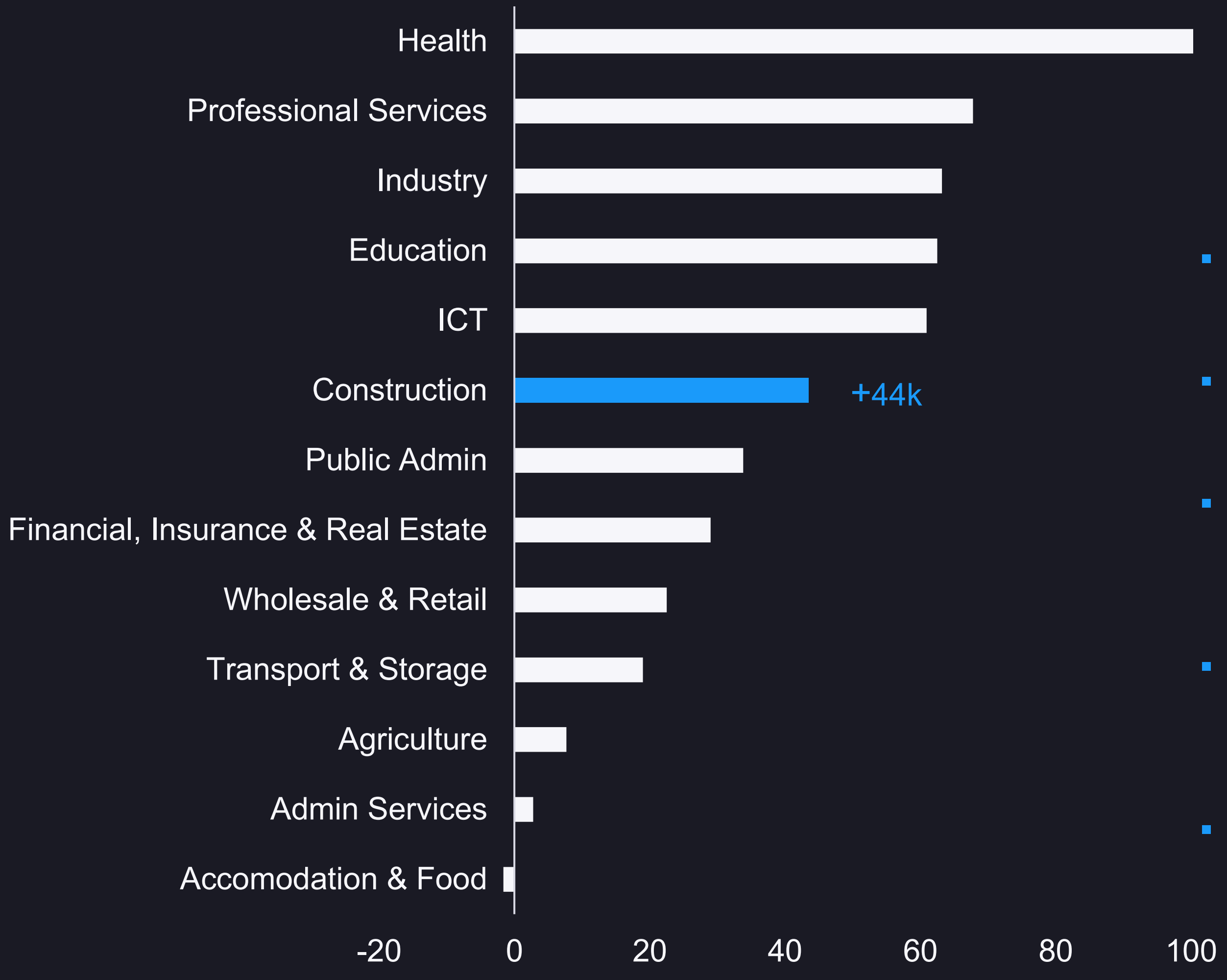
**2.2%**

**2026**

**1.8%**

(Annual change, Labour Force Survey)
Source: EY Economic Eye

**Employment by sector, ROI, change 2019 Q2- 2025 Q2 (000s)**

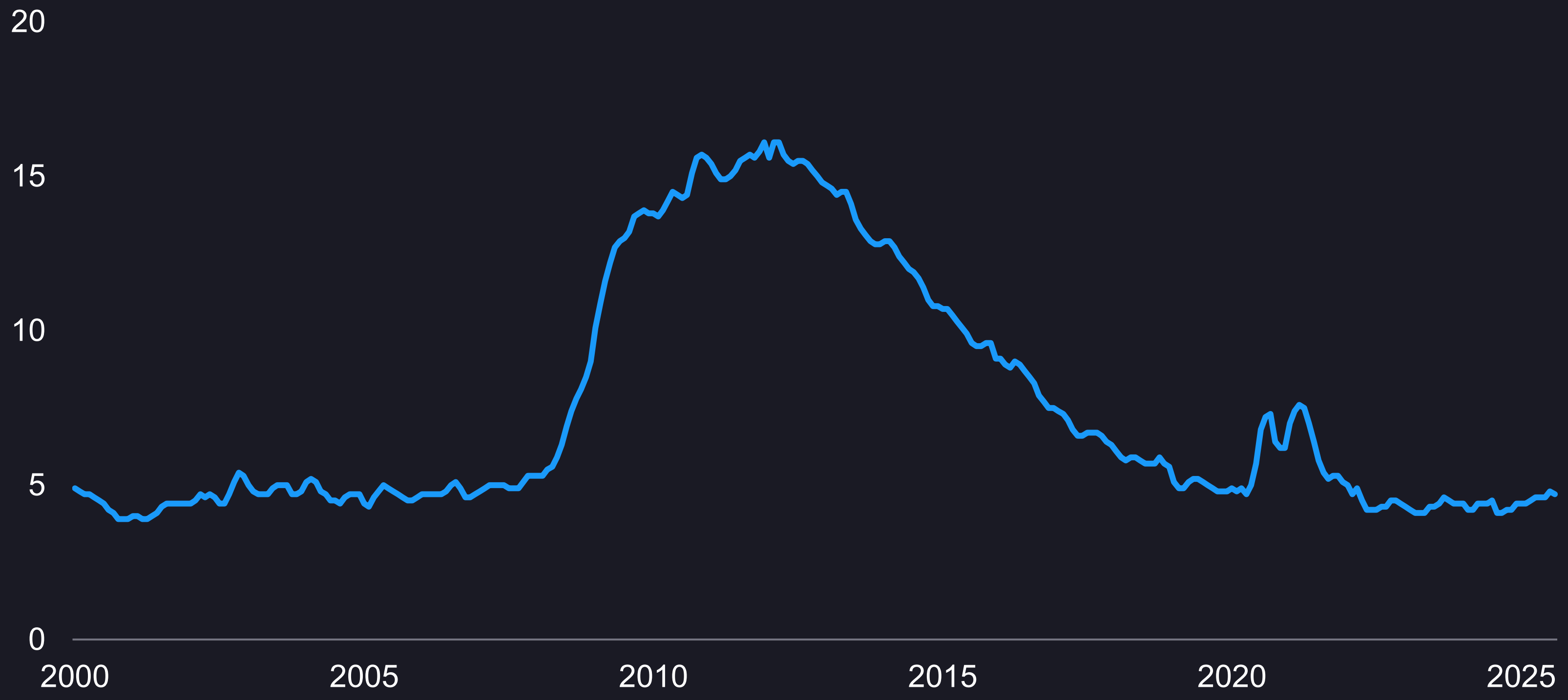



+506,600
Total employment growth
(2019 Q2 – 2025 Q2)
3.4% p/a ave

- Construction employment 190,300 or 6.8% of total
- Construction employment at peak (Q2 '07) was 239,800 or 10.8% of total (2.2m)
- An additional c.50,000 workers to deliver close to 70,000 new dwellings per year (Davy)
- An additional 80,000 workers to build 50,000 new dwellings per year and retrofit 444,106 older homes (DFHERIS)
- Need 54,000 workers by 2030 or 40,000 if allow for MMC (Indecon)

# Low Unemployment Rate

**Ireland Unemployment Rate**




(ILO measure, %)
Source: CSO

**Unemployment Forecast**

| 2025 | 2026 |
|---|---|
| 4.6% | 4.8% |

(Rate)
Source: EY Economic Eye

Expected to increase slightly but remains broadly at a level consistent with full employment

# A recap on what Construction captures €34.4 billion in 2024

The general construction of buildings of all kinds (new, renovation, pre-fabricated structures on site and construction of a temporary nature) by the public and private sectors

## Definition of construction

**(NACE Rev. 2 – Section F (41-43)**

- **F41:** Construction of residential and non-residential buildings
- **F42:** Civil Engineering
- **F43:** Specialised construction activities / trades (e.g. demolition, electrical installation, plumbing & heating, building completion & finishing)

## Non-residential construction

10.2m sqm of floor area granted planning permission for **new non-residential building** in last 4.5 years; Permission down 32% in first half of 2025 YoY; 85% decline in offices

**New office space** u/c in Dublin end June 2025: 150,300 sqm [C&W]; no new offices commenced in H1 2025

**Industrial and logistics** 135,000 sqm u/c in Dublin end Q3 2025 [CBRE] due 2025/2026

A future construction pipeline of €8-10bn of **Data centres** exists with a further €8-10bn at risk across 15 projects over coming decade [Bitpower]

**Retail, hotels, sports** & **cultural** facilities

## Public sector contribution

Funded from Exchequer and non-Exchequer sources (NDP):

- Social and affordable housing
- Education
- Health
- Government buildings

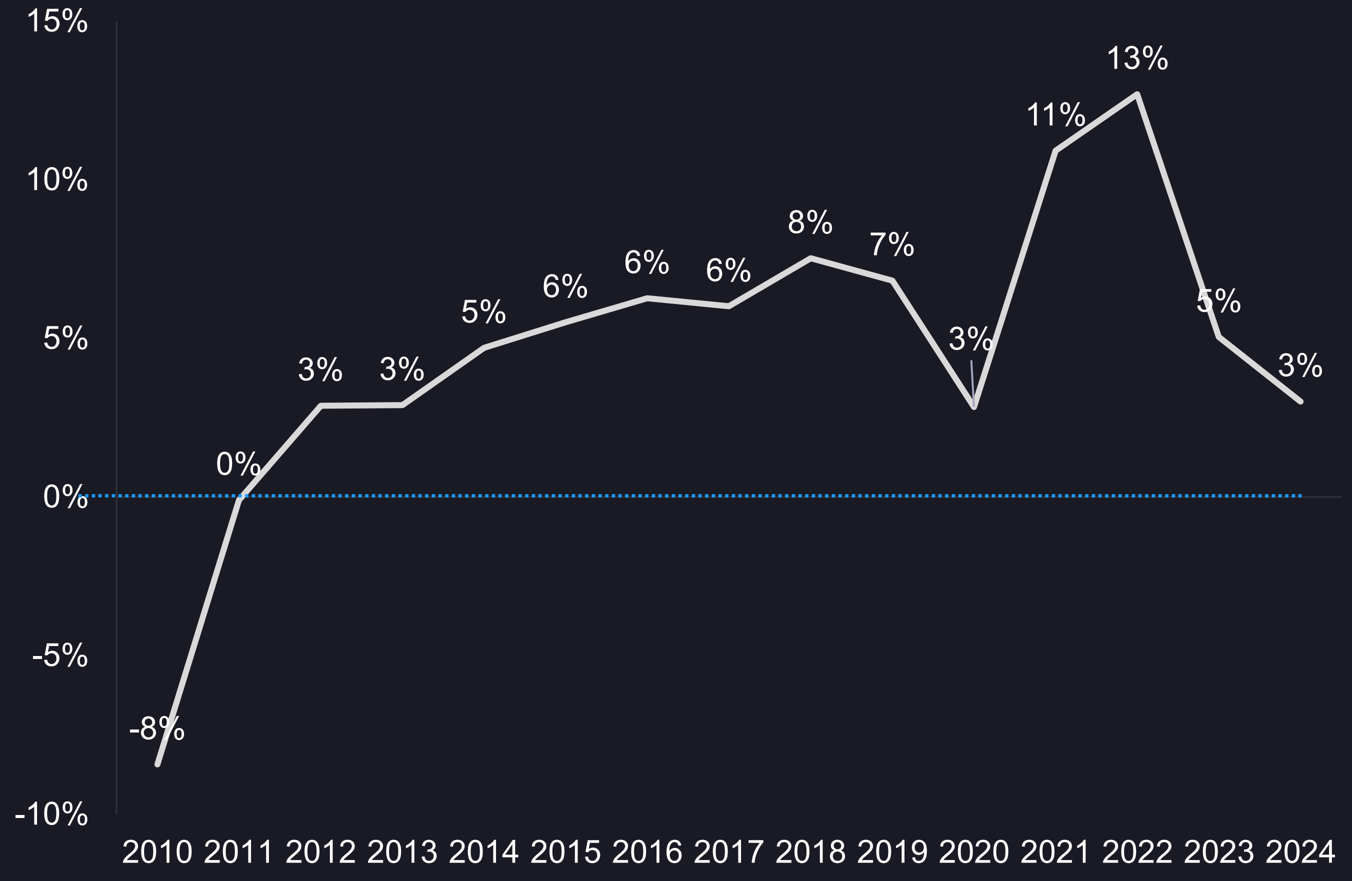
**Civil Engineering projects:**

- Roads
- Public transport
- Ports/airports
- Water
- Energy
- Telecoms

# Construction Inflation moderates to 1.5% in H1 2025

- Construction inflation (tender prices) peaked at 13% in 2022 but stabilised over past year, with YoY changes at 11.5% in H2 2022, 3.9% in H2 2023 and 2.9% in H2 2024
- SCSI report a 1.5% increase in TPI in H1 2025
- Wholesale prices for B&C materials also moderated from a peak of 19.3% YoY in July 2022 to 15.6% in Dec 2022,  0.9% in Dec 2023, and 1% in Dec 2024, staying reasonably stable thereafter at around 0.4% to 1% YoY to September 2025.
- Average weekly earnings in construction were €55,386 in Q2 2025. (+6.0% YoY), in line with the national average (€52,802)
- Average hourly earnings in construction were €29.90 (10.1% YoY) versus a national average of €31 (4.3% YoY)
- Mitchell McDermott have forecast tender price inflation of 2-4% for 2025; T&T expect 3.6% in 2025 and 2.8% in 2026

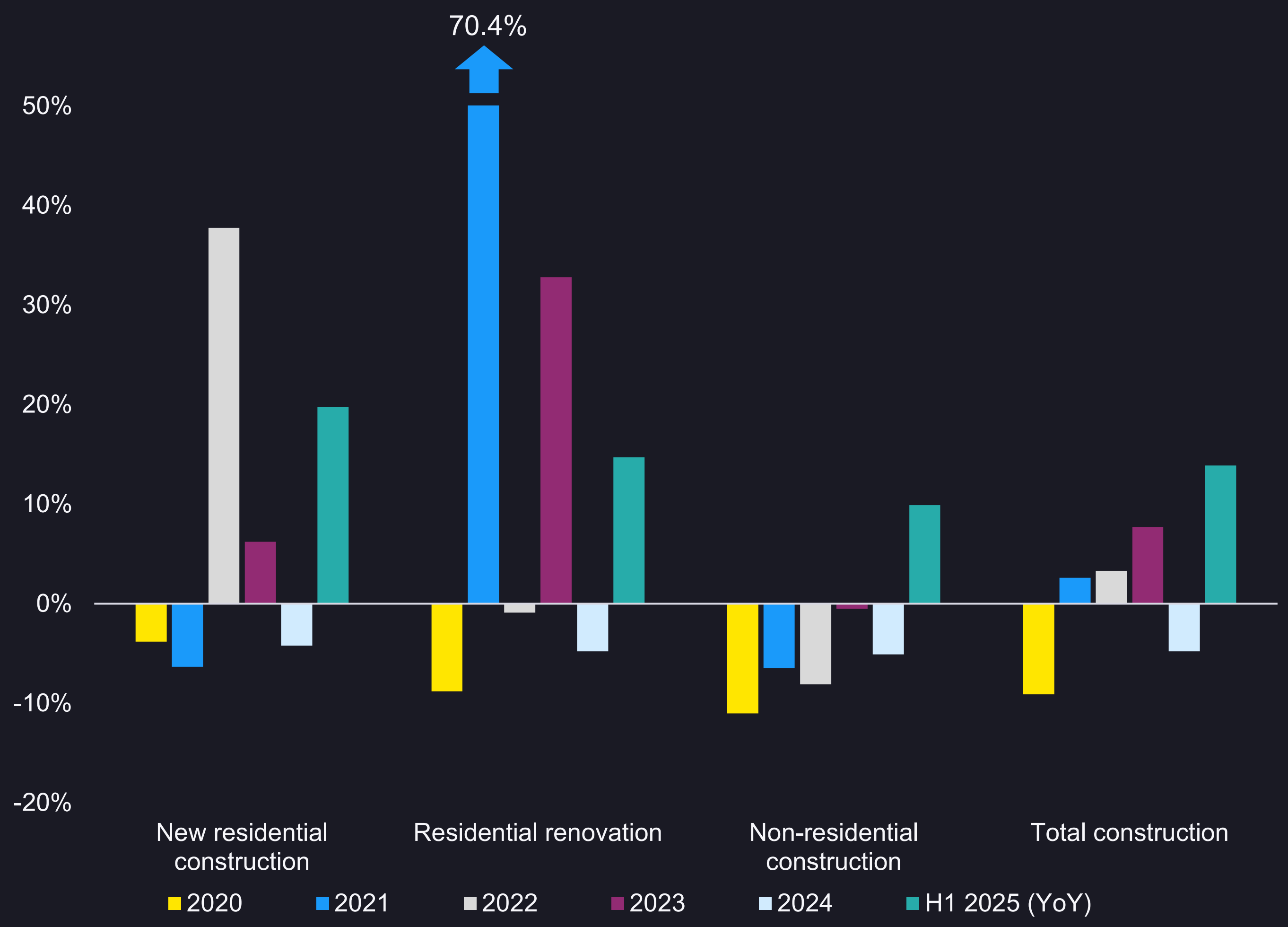
**Construction inflation 2010-2024 based on Tender Prices**




Source: SCSI.

# Performance of Building and Construction sector

**Building and Construction Investment 2019 – H1 2025, volume % change**

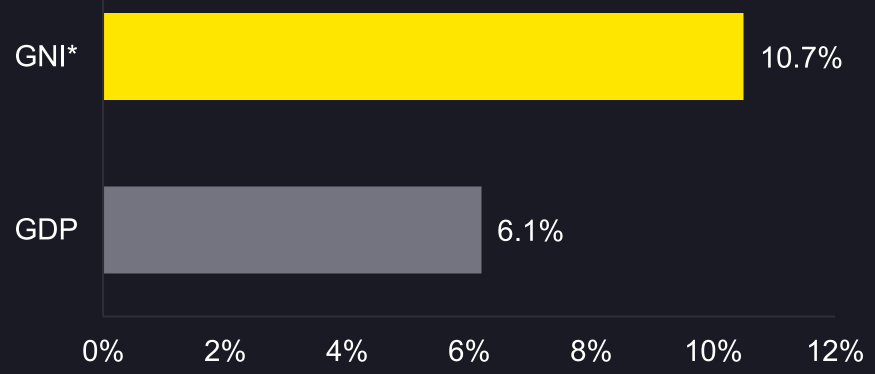



Source: CSO National Accounts

| | Total construction | New residential construction | Residential renovation | Non-residential construction |
|---|---|---|---|---|
| | Volume % change Year-on-Year | | | |
| **2020** | -9.1% | -3.8 | -8.8 | -11.0 |
| **2021** | 2.6% | -6.4 | 70.4 | -6.5 |
| **2022** | 3.3% | 37.8 | -0.9 | -8.1 |
| **2023** | 7.7% | 6.2 | 32.8 | -0.5 |
| **2024** | -4.8% | -4.2 | -4.8 | -5.1 |
| **H1 2025 (YoY)** | 13.9% | 19.8 | 14.7 | 9.9 |
| **2024 €bn.** | **34.4** | **10.3** | **7.8** | **16.3** |

Source: CSO National Accounts
Annual Table uses NSA Constant Prices referenced to 2023.

**B&C in 2024, % of GDP & GNI***

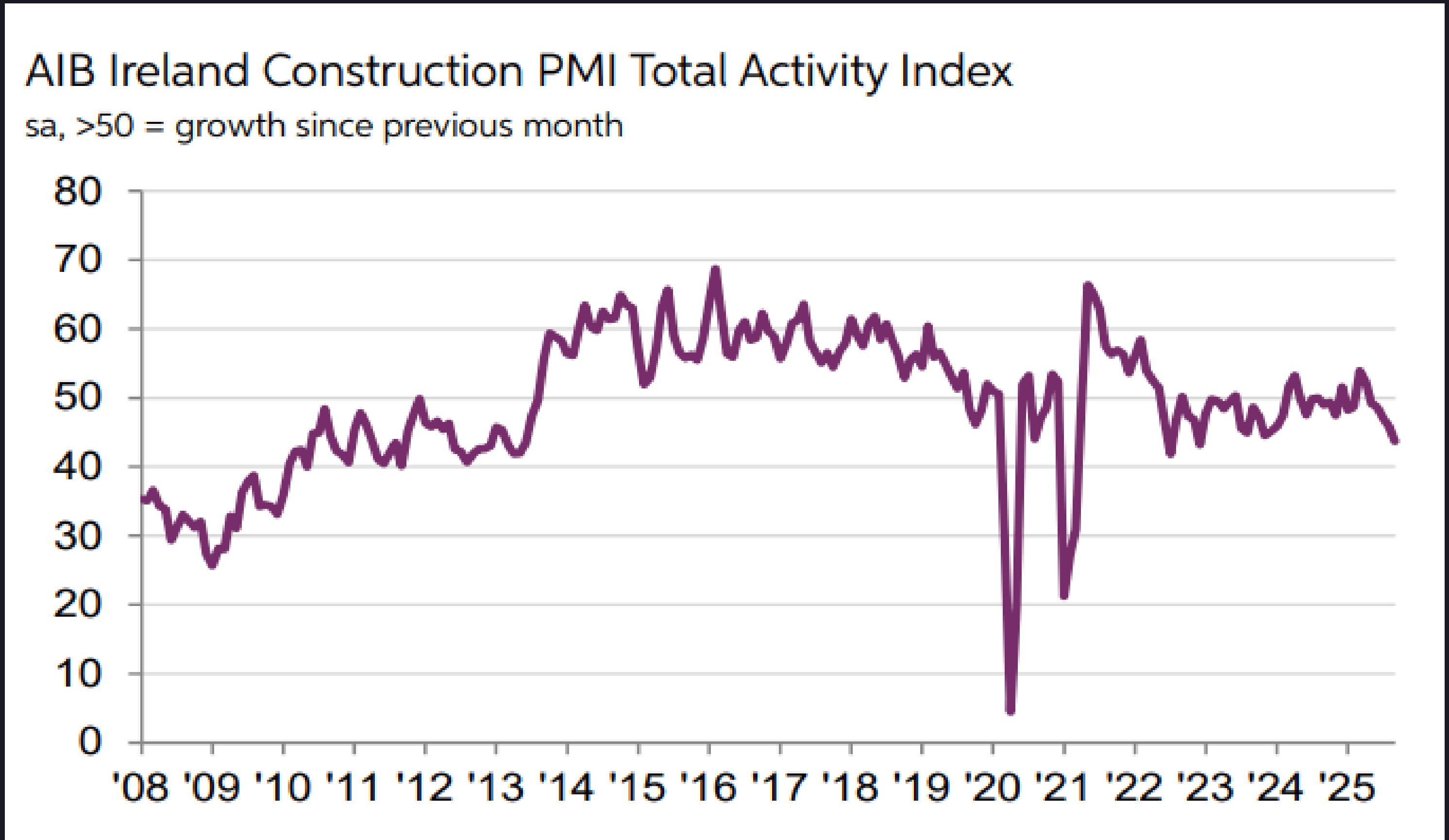



Source: CSO National Accounts

Modified Gross National Income (GNI*) is an indicator designed specifically to measure the size of the Irish economy by excluding Globalisation effects.

# Construction PMI September 2025 - evidence of unease in industry

- AIB Construction PMI reported sharp reductions in activity and new orders in Q3 2025
- PMI dropped to 43.7 in September from 45.9 in August, signalling the lowest reading since December 2022 and below the 50.0 no-change mark for the fifth consecutive month.
- PMI showed work on housing projects down for the fifth consecutive month in September. The sharpest reduction was in civil engineering activity, while commercial activity posted a much steeper decline in August and the most pronounced since December 2023.
- A relatively muted level of business sentiment when looking to the future




Source: AIB, September 2025.

# CIF Outlook Survey Q3 2025 – key issues in industry

**Highlights:**

**54%**

of respondents expect the **Cost of Labour** to increase in Q3 2025

**23%**

of respondents report an increase in the total **number of people they employ**, with 20% expecting the trend to continue in coming months

**72%**

of respondents report a YoY increase in the **cost of raw materials** and 68% expect the cost of raw materials to increase in Q3 2025

Source: The CIF Outlook Survey 2025. It provides the CIF with an ongoing tracker of members' sentiment towards the current and future performance of the construction sector. The survey measures the performance of the sector in the previous quarter (Q2: April – June 2025) and the likely future performance of the sector in the next 3-month period (Q3: July - September 2025)

**Highlights:**

**72%**

of companies had no/low involvement in **Public Works Contracts** in Q2 2025, with

**69%**

expecting no/low involvement in Q3 2025.

**15%**

of companies expect their level of Public Works Contracts to increase in the next 12 months

**10%**

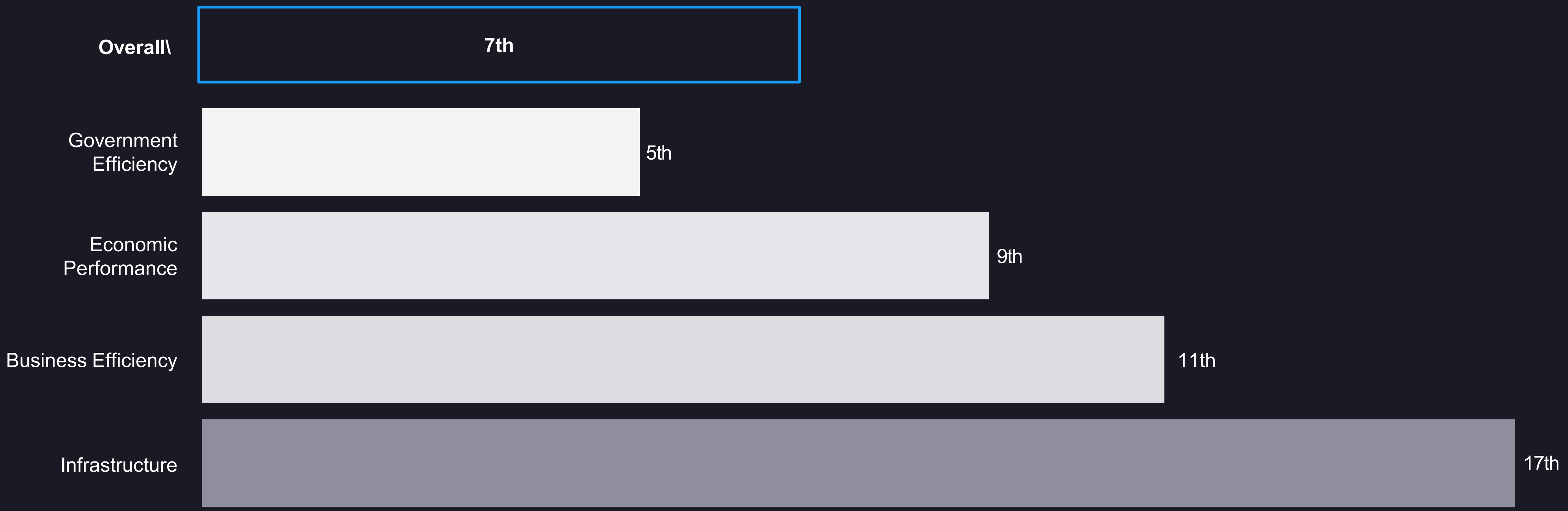
of companies currently carrying out public works expect to reduce their level of Public Works Contracts

Why reducing public works contracts:

- Lowest price award criteria
- Margin too low
- Too much bureaucracy
- Cost of tendering
- Delays in the award of tenders
- Projects take too long to complete

# Policy Focus on Competitiveness – yet we rank poorly on infrastructure

**Ireland 2025 World Competitiveness Ranking**

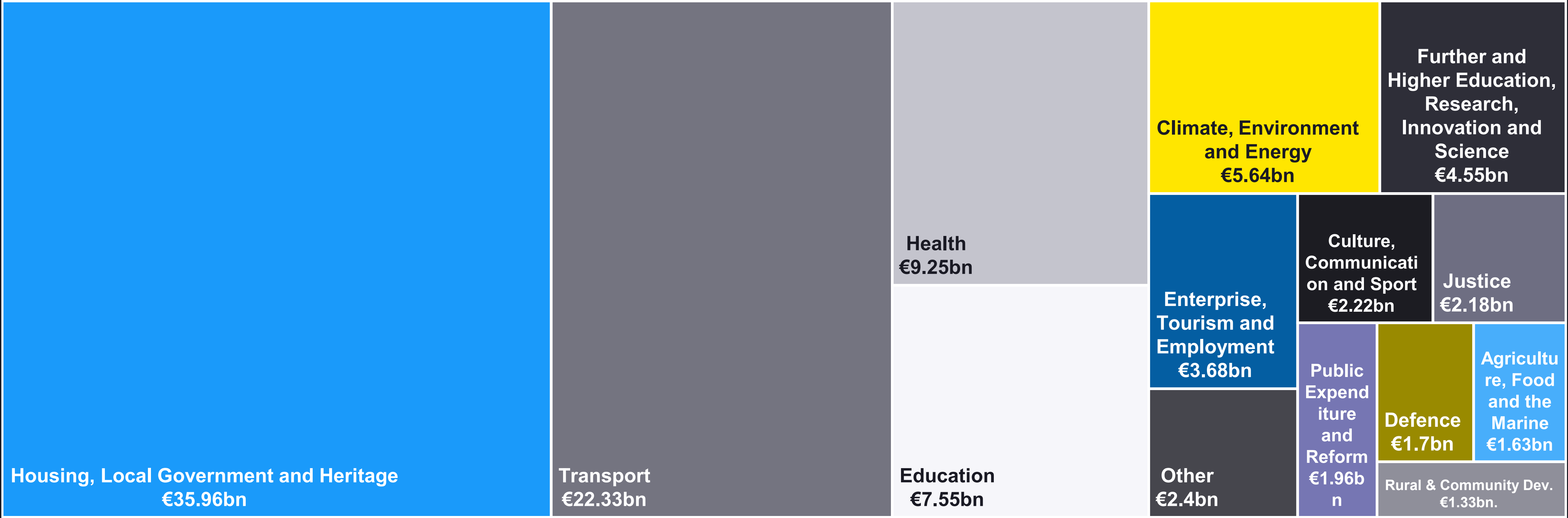



Source: International Institute for Management Development

1) Infrastructure constraints in energy, transport and housing and the rising cost of doing business pose potential risks to investment prospects
2) Actions in the Government's *Action Plan on Competitiveness and Productivity* include 'increasing the State's capacity to deliver infrastructure'.

# Capital Spending Programme - €275.4bn Updated National Development Plan for 2026–2035

**€102.4bn allocated to Government Departments to support infrastructure delivery over the period 2026 to 2030**




Source: Government of Ireland

# Public capital investment provisions are significant  in 2026– not all construction

10,200 new social homes; 15,000 new affordable homes; LA Housing Loans, LDA funding; Housing supports; Water €1.4bn

Hospitals €1.25bn), IT systems

ESB, Eirgrid, Energy Conservation

NB Plan; sports facilities (e.g. National Velodrome)

Greenways, active travel, Roads, CIE, Public Transport [MetroLink, Bus Connects], DAA, Asset Protection & Renewal

Post Primary, Primary and schools

Third level education, skills, R&D Infrastructure

**Total Public Capital Investment**

| *€ million, nominal* | 2025 | 2026 | 2027 | 2026/2025 % change |
|---|---|---|---|---|
| Housing, Local Government & Heritage | 5,969 | 7,246 | 7,421 | 21.4% |
| Transport | 2,877 | 3,430 | 4,175 | 19.2% |
| Education & Youth | 1,602 | 1,600 | 1,600 | -0.1% |
| Health | 1,460 | 1,560 | 1,720 | 6.8% |
| Climate, Energy & Environment | 770 | 865 | 1,049 | 12.3% |
| Further & Higher Education, Research, Innovation & Science | 720 | 810 | 925 | 12.5% |
| Culture, Communication & Sport | 620 | 701 | 450 | 13.1% |
| **Total PCP** | **25,770** | **27,643** | **N/A** | **7.3%** |
| *as % of GDP* | *4.1%* | *4.2%* | to increase to over 5% | |
| *as % of GNI** | *7.6%* | *7.7%* | | |
| Exchequer component | 16,584 | 18,810 | 20,062 | 13.4% |
| *as % of GDP* | *2.6%* | *2.9%* | *2.9%* | |
| *as % of GNI** | *4.9%* | *5.2%* | *5.4%* | |

Source: Budget Expenditure Report, 2026

# Housing Indicators – delivery at the necessary scale requires urgent action

| | 2021-2024 | Jan-Jun 2025 | % change YoY |
|---|---|---|---|
| **Planning Permissions (000s)** | | | |
| Houses | 73.1 | 9.7 | -3% |
| Apartments | 77.7 | 6.0 | -14% |
| Total | **150.8** | **15.6** | **-8%** |

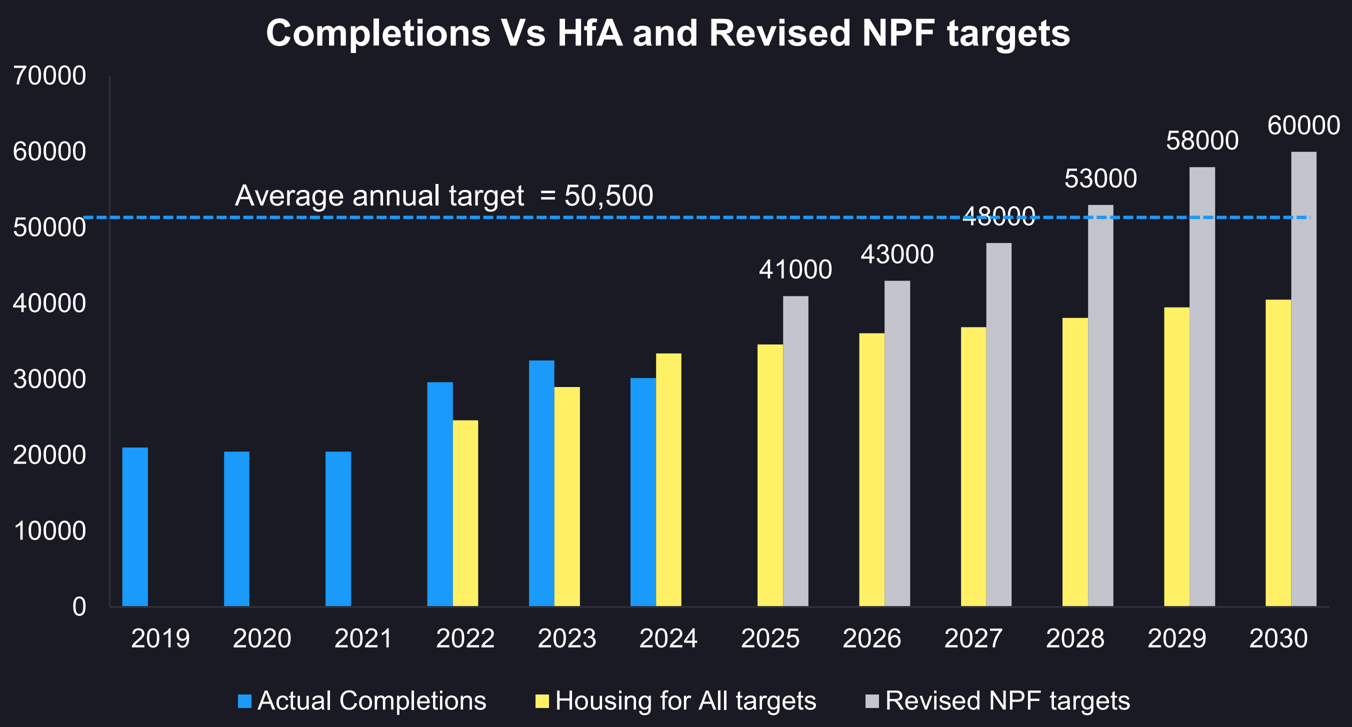
| | | Jan-Sep 2025 | % change YoY |
|---|---|---|---|
| **Commencements (000s)** | | | |
| Scheme houses | 73.2 | 4.0 | -84% |
| Single units | 20.9 | 2.8 | -38% |
| Sub-total Houses | **94.1** | **6.8** | **-77%** |
| Apartments | 65.4 | 3.4 | -85% |
| Total | **159.5** | **10.2** | **-80%** |

| | | Jan-Sep 2025 | % change YoY |
|---|---|---|---|
| **Completions (000s)** | | | |
| Houses | 78.4 | 16.4 | 7% |
| Apartments | 34.3 | 8.0 | 30% |
| Total | **112.8** | **24.3** | **13%** |

| Gap: PP Vs. Commencements (000s): 2021 to date | |
|---|---|
| Houses | -18.2 |
| Apartments | 14.9 |
| Total | **-3.3** |

| Gap: PP Vs. Completions (000's): 2021-date | |
|---|---|
| Houses | -12.0 |
| Apartments | 41.4 |
| Total | **29.3** |

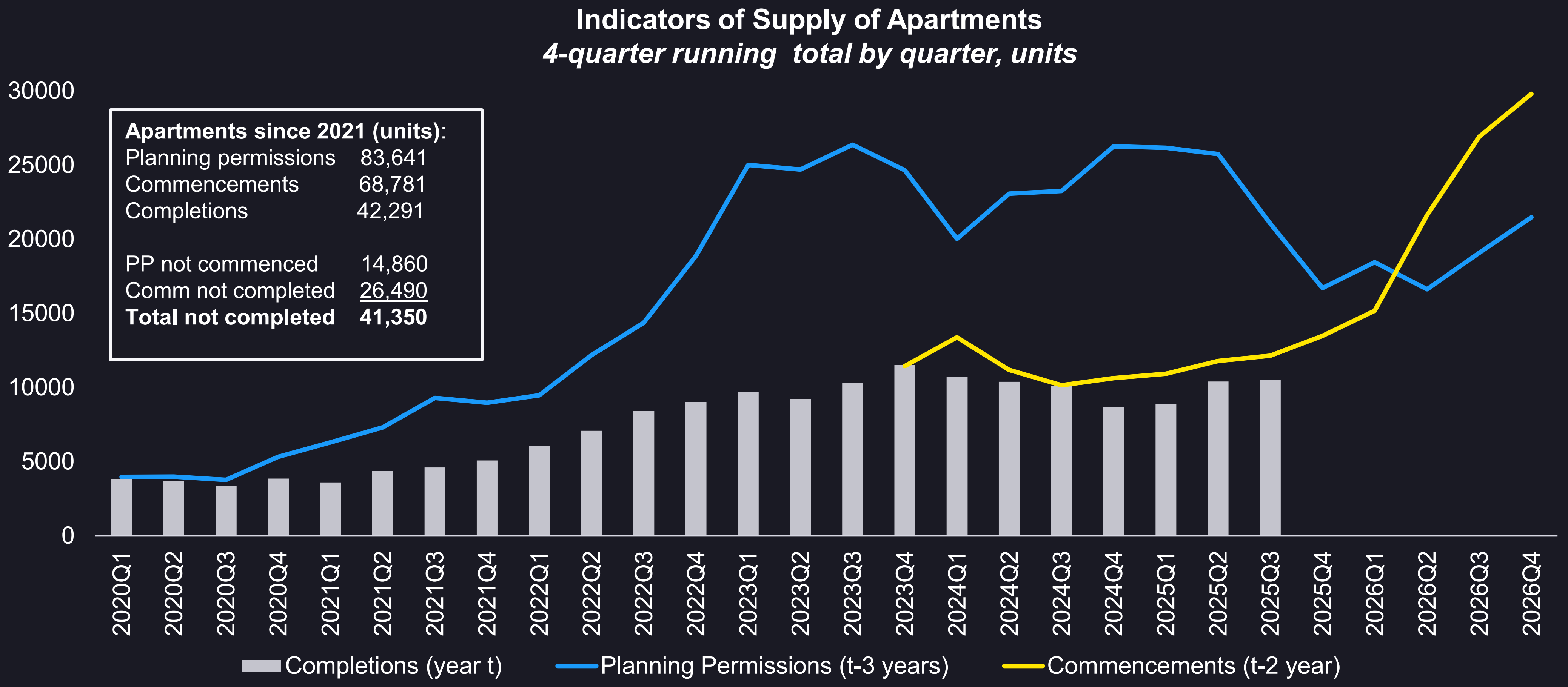
Source: CSO, gov.ie




Source: CSO, Department of Housing, Planning and Local Government, Revised National Planning Framework.

Expect 34,000 completions in 2025 and 37,000 in 2026

# Housing Indicators: delivery of apartments a key issue




Source: www.cs.ie and www.gov.ie
Note: The commencements data have been moved forward by two years and the planning permissions have been moved forward three years to establish if there is a close link between completions in year t, commencements two years earlier and permissions three years earlier, assuming it takes two years to build an apartment block.

There were 44,505 units permitted but which had not commenced, of which 39,013 were apartments at end Q1 2025. Of the 44,505 uncommenced units, 37,162 were located on inactive sites (Fingal County Council).

# Conclusions

- Many risks as underlying economic growth momentum has started to soften
- Must acknowledge the multitude of measures, initiatives and supports that the Government have introduced to support housing delivery, viability and affordability over recent years
- While seeing significant engagement with the industry, it needs to be more up-front with respect to areas that impact the industry
- Real commitment now to prioritise housing and infrastructure with NDP investment, forthcoming sectoral action plans and Housing for All #2
- To ‘do nothing’ or ‘do minimum’ are not options – would mean further rental and house price inflation – impact our competitiveness and attractiveness as a country
- It has to be all about delivery, delivery and delivery now

# Thank You

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CONSTRUCTION
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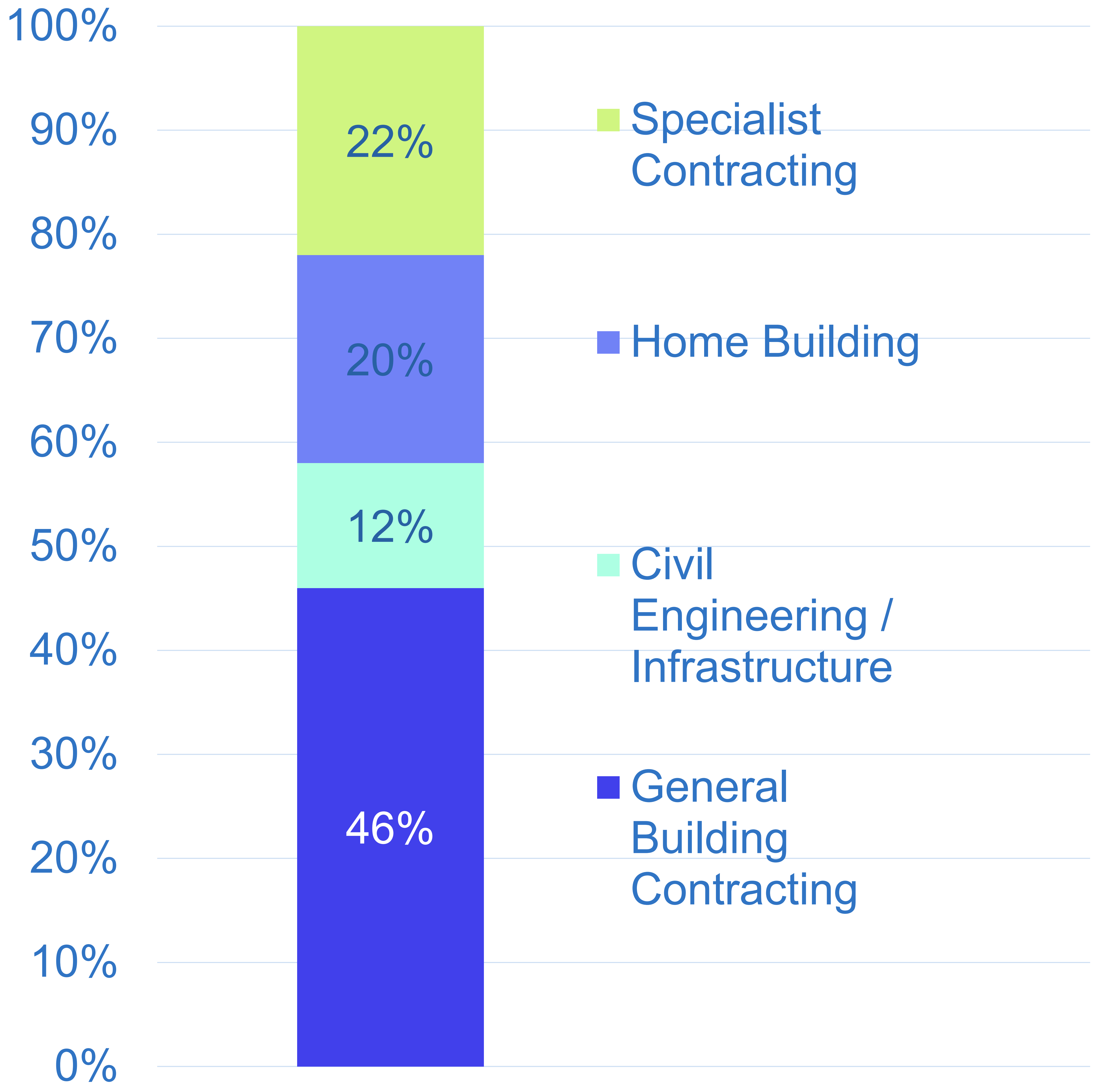
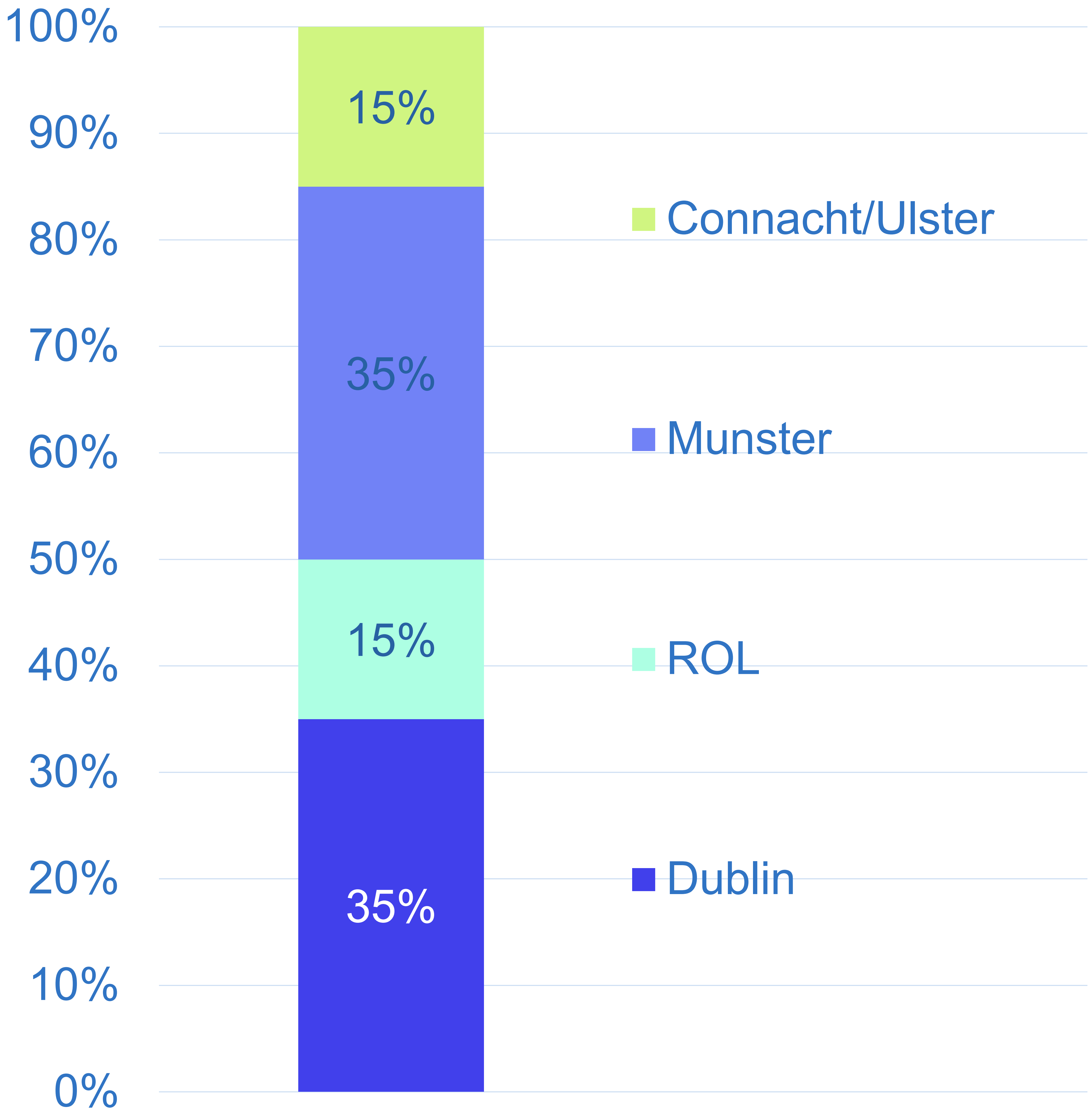
# Irish Concrete Federation Conference

## CIF Construction Outlook Presentation

Paul Sheridan, Director Main Contracting and Civil Engineering
Nov. 2025

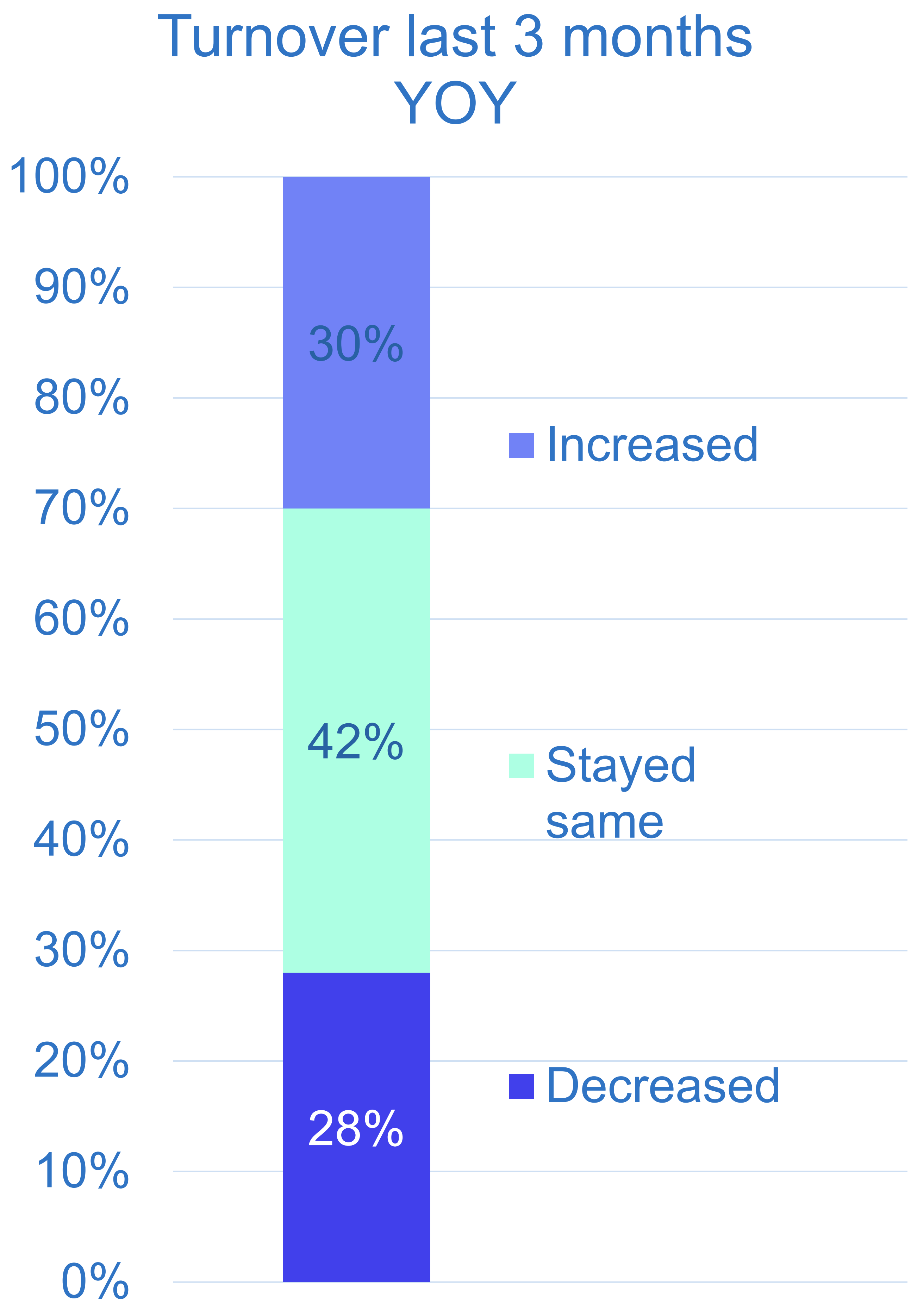
# Sample Breakdown by Company Category

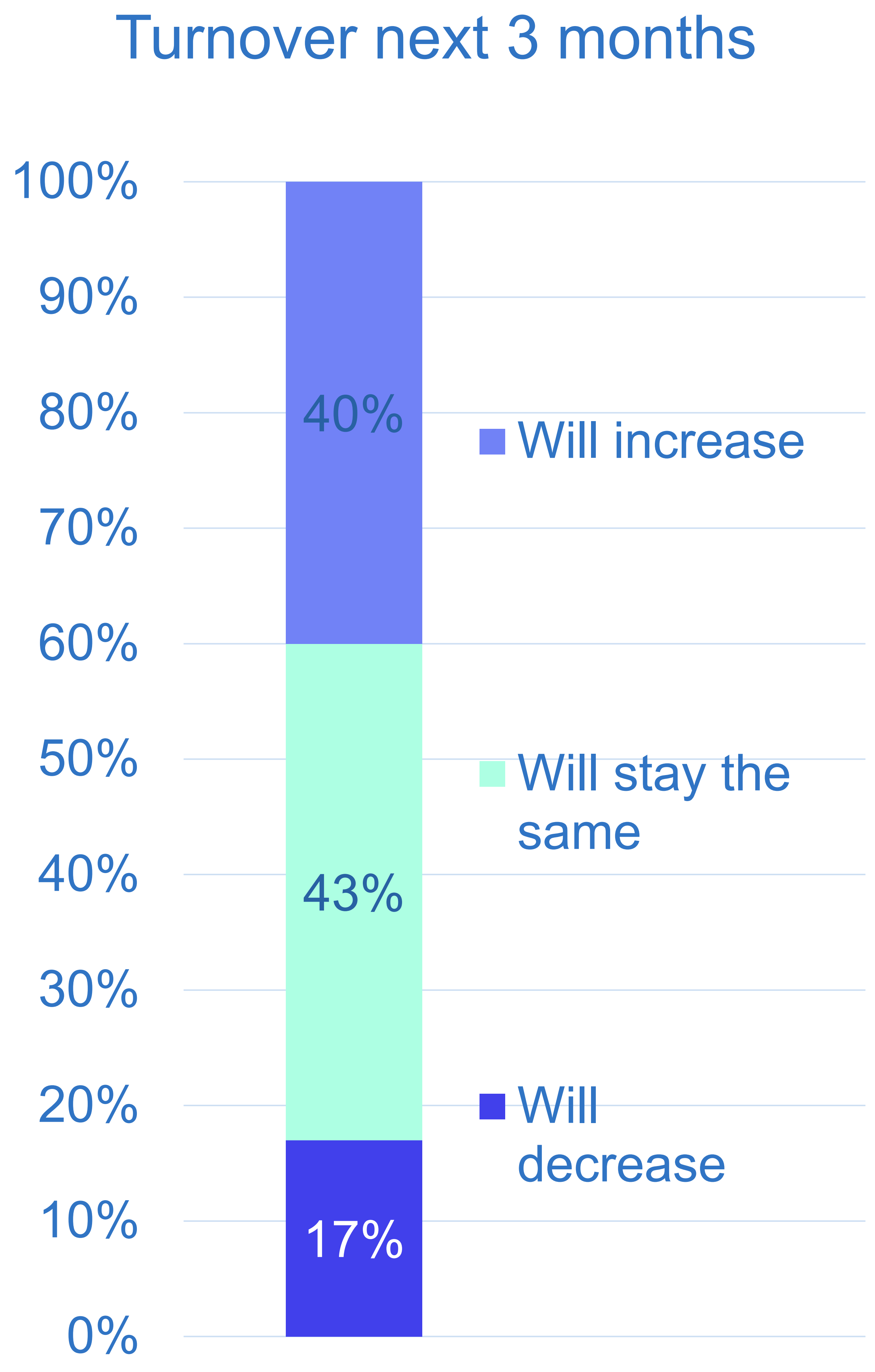



(Base: All respondents = 110)

# Business Turnover Last 3 Months v Next 3 Months




30%

of companies report a YOY increase in turnover in Q2 2025

40%

of companies anticipate turnover will increase in Q3 2025

Home Building, Specialist Contracting and Civil Engineering/Infrastructure expect business turnover to increase in Q3 compared to Q2.

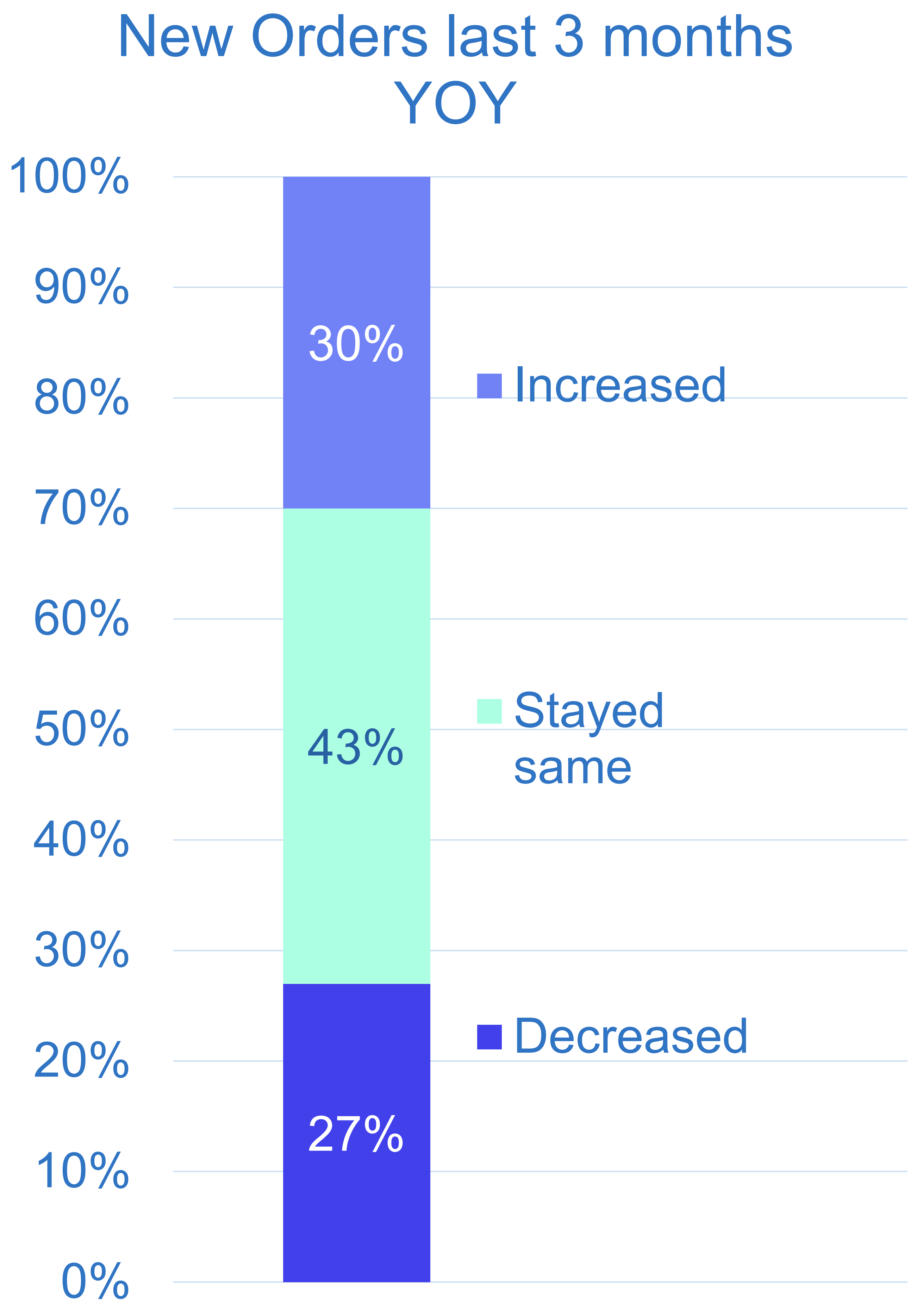
Turnover in General Building Contracting has mostly remained, and is forecast to remain, the same.

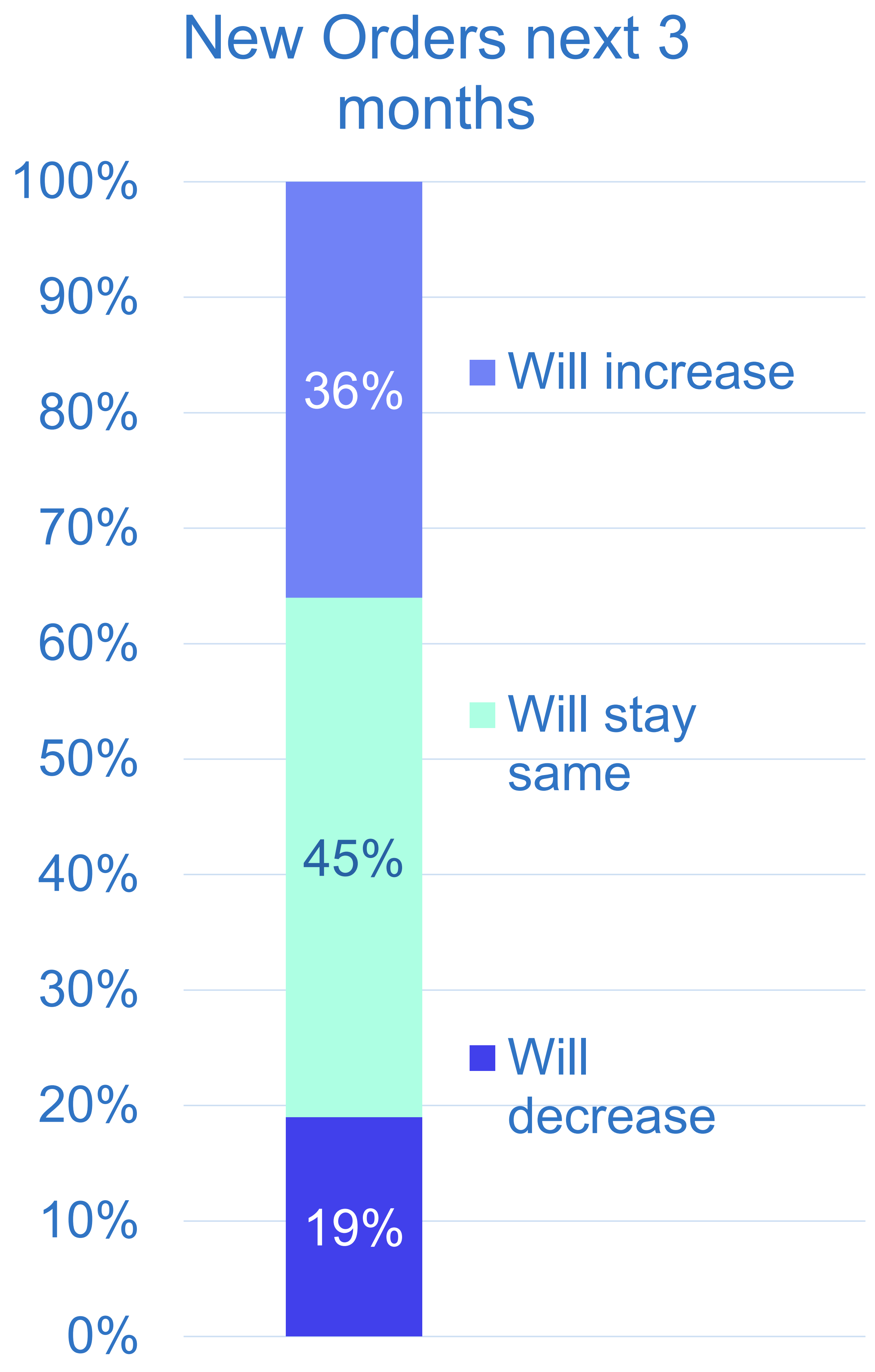
(Base: All respondents = 110)

Q3. In the last 3 months (Apr - Jun 2025) has the total business turnover for your company increased, decreased or stayed the same compared with the same period in 2024?

Q4. Thinking now about the next 3-month period (Jul - Sep 2025), do you expect total business turnover for your company to increase, decrease or stay the same compared with the last 3 months?

# New Orders Last 3 Months v Next 3 Months




## 30%

of companies report a YOY revenue increase from new orders

## 36%

of companies expect revenue from new orders to continue to increase into Q3 2025

In terms of sectoral revenue from new orders there was a YOY reduction across Home Building and General Contracting and an increase across Civil Engineering/Infrastructure and Specialist Contracting.

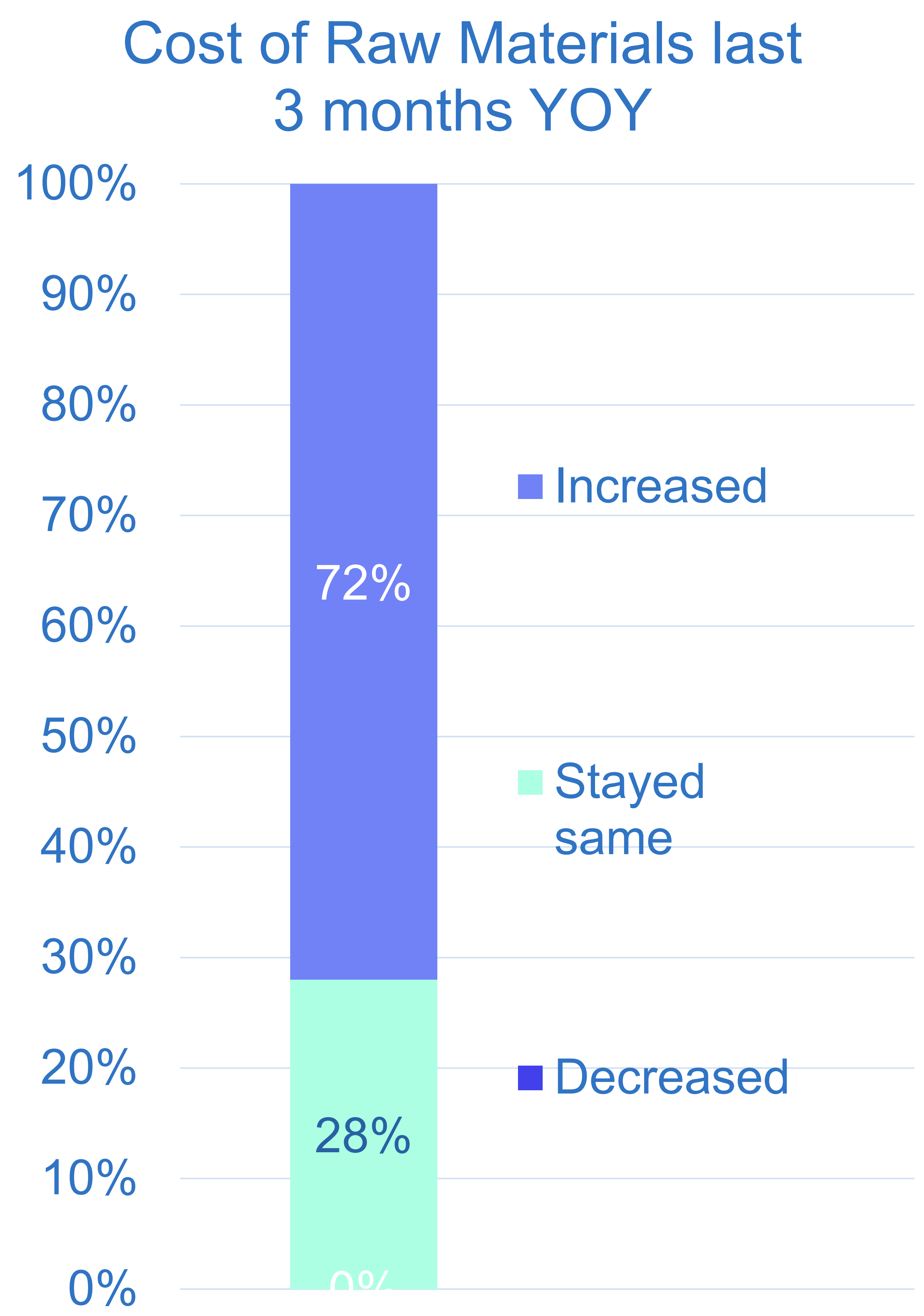
All sectors expect new orders to increase in Q3 2025, except for home building.

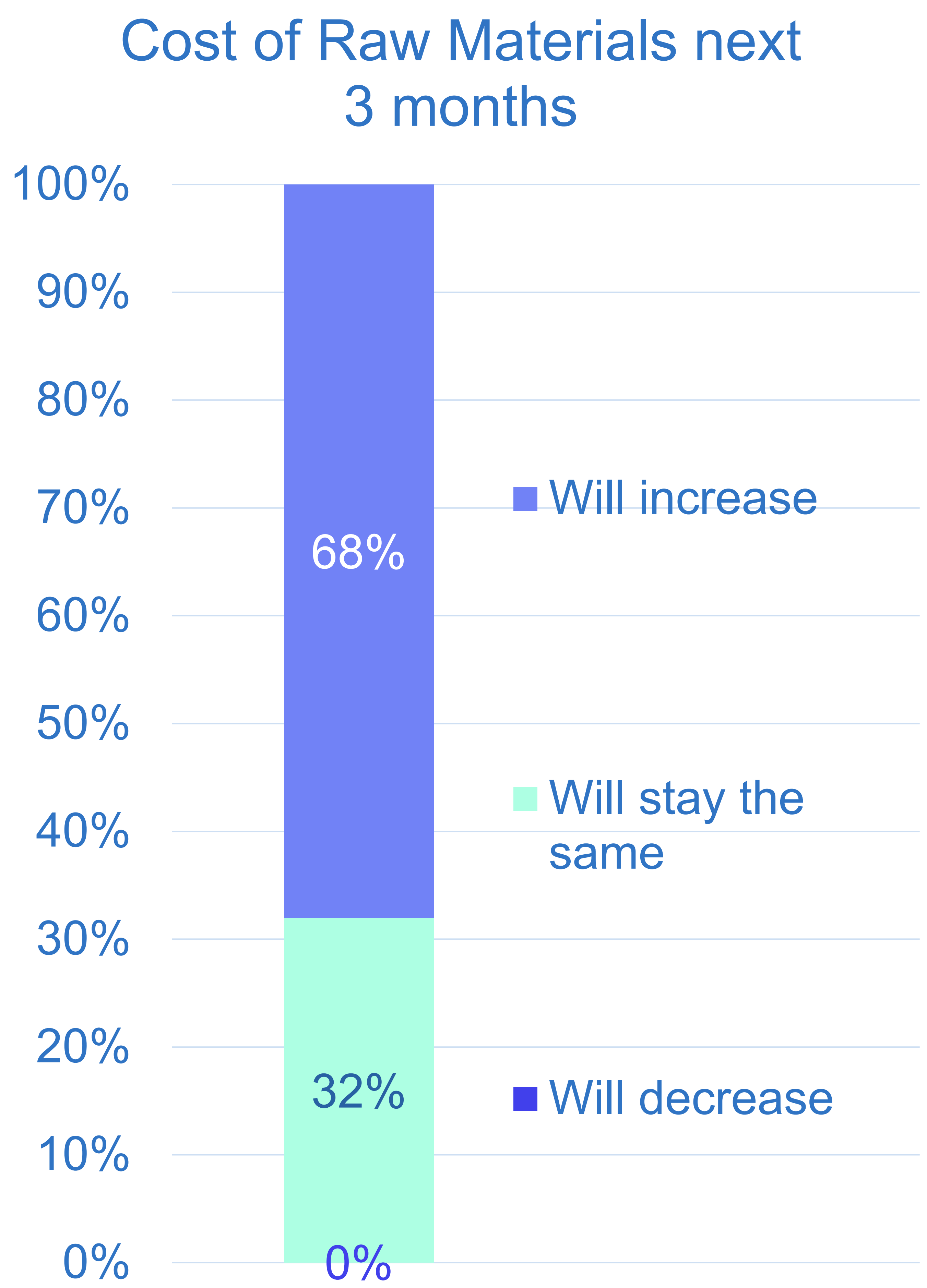
(Base: All respondents = 110)

Q5. In the last 3 months has the total revenue generated by new orders for your company for the period increased, decreased or stayed the same compared with the same period in 2024?

Q6. In the next 3-month period (Jul - Sep 2025), do you expect the total revenue generated by new orders for your company to increase, decrease or stay the same compared with the last 3 months?

# Cost of Raw Materials Last 3 Months v Next 3 Months




72%

of companies report a YOY increase in the cost of raw materials in Q2 2025

68%

expect the cost of raw materials to increase to continue to increase in Q3 2025

The YOY increase in the cost of raw materials was reported across all sectors and companies regardless of size.

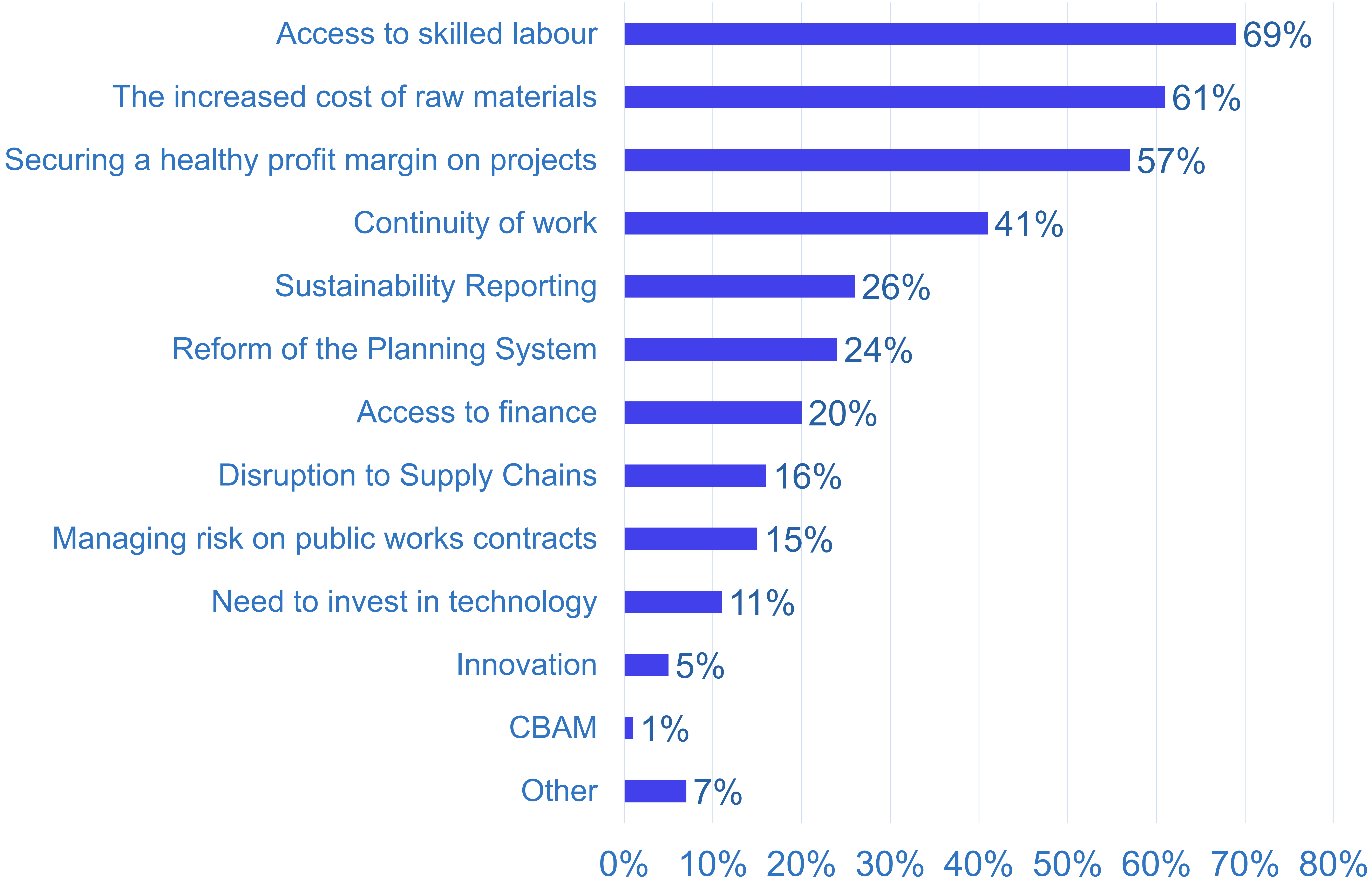
(Base: All respondents = 110)

Q11. In the past 3 months (Apr - Jun 2025) has the cost of raw materials for your company increased, decreased or stayed the same compared with the same period in 2024?

Q12. In the next 3-month period (Jul - Sep 2025), do you expect the cost of raw materials to increase, decrease or stay the same compared with the last 3 months?

# Key Challenges

# Key Challenges

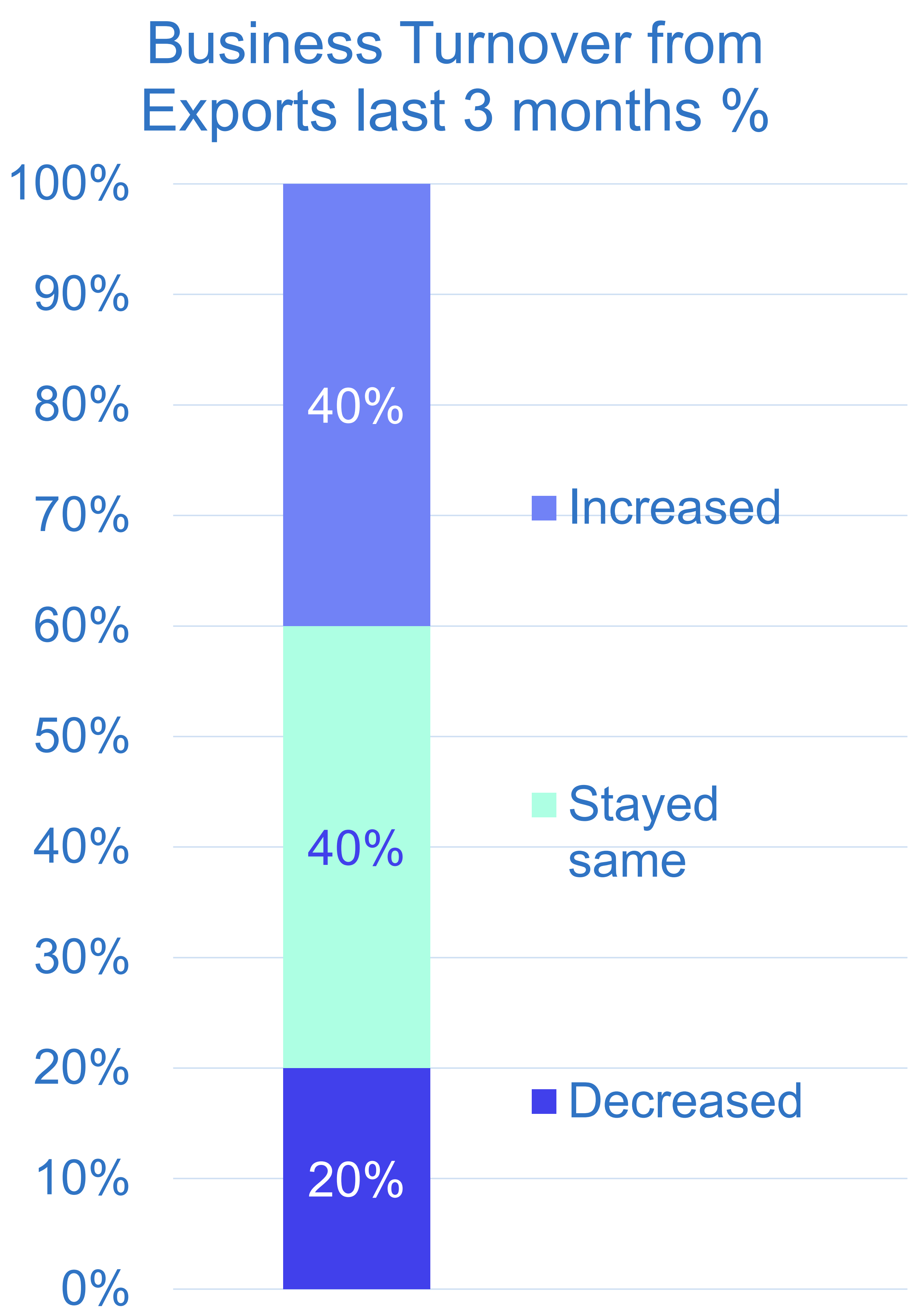


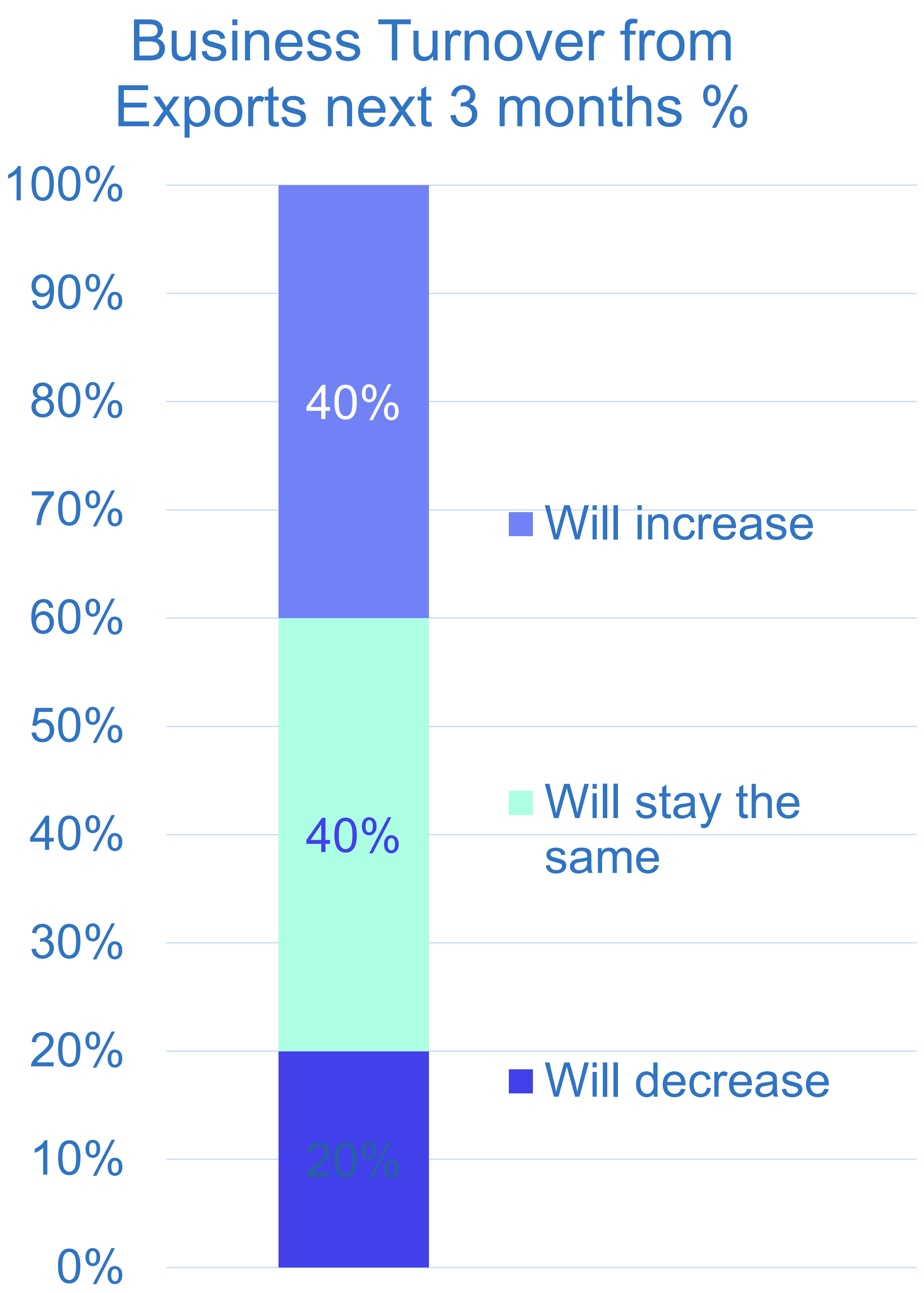

**Access to skilled labour, securing a healthy profit margin on projects and the increased cost of raw materials remain the 3 most significant challenges**

Q15. What if any, are the key challenges facing your business over the next 3-6 months? (Base: All respondents = 110)

# Exporting Construction Services

# Total Business Turnover generated from Exports




## 40%

Report a YOY increase in business turnover from exports

## 40%

expect turnover from exports to increase in Q3 2025

Data Centres and Pharmaceutical Plants and Retail were again the most common projects delivered internationally in Q2 2025.

These project types, together with commercial offices and hotels are the most common projects expected to be delivered internationally in Q3 2025.

Q18. Over the last 3 months, has the total business turnover for your company generated from exports increased, decreased or stayed the same compared with the same period in 2024?

Q20. Over the next 3 months (Jul-Sep 2025), do you expect the total business turnover for your company generated from exports to increase, decrease or stay the same compared with Q2?

# Public Works Contracts

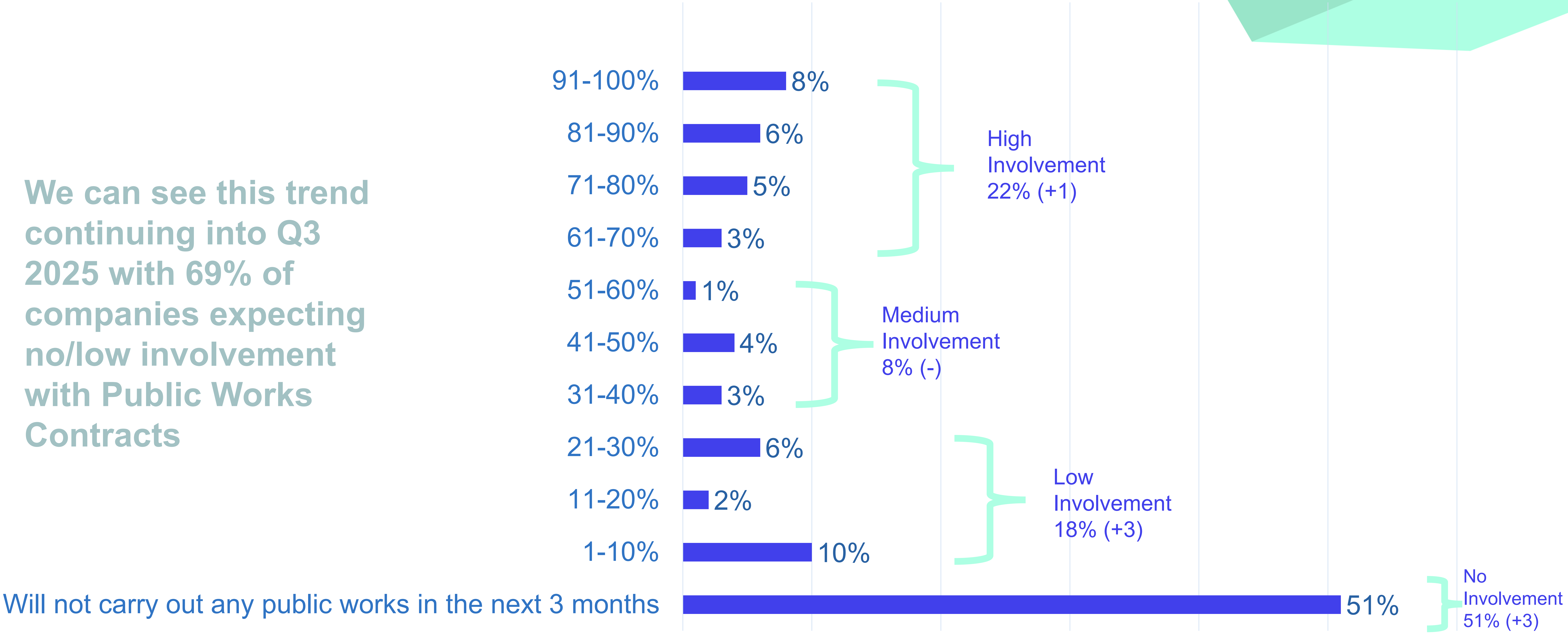
# Public Works Contracts as a % of Turnover Q2 2025

**72% of companies had no/low involvement in Public Works Contracts in Q2**


Q22. In the last 3 months, approximately what % (based on turnover) of your order book was from Public Works Contracts? (Base: All respondents = 110)

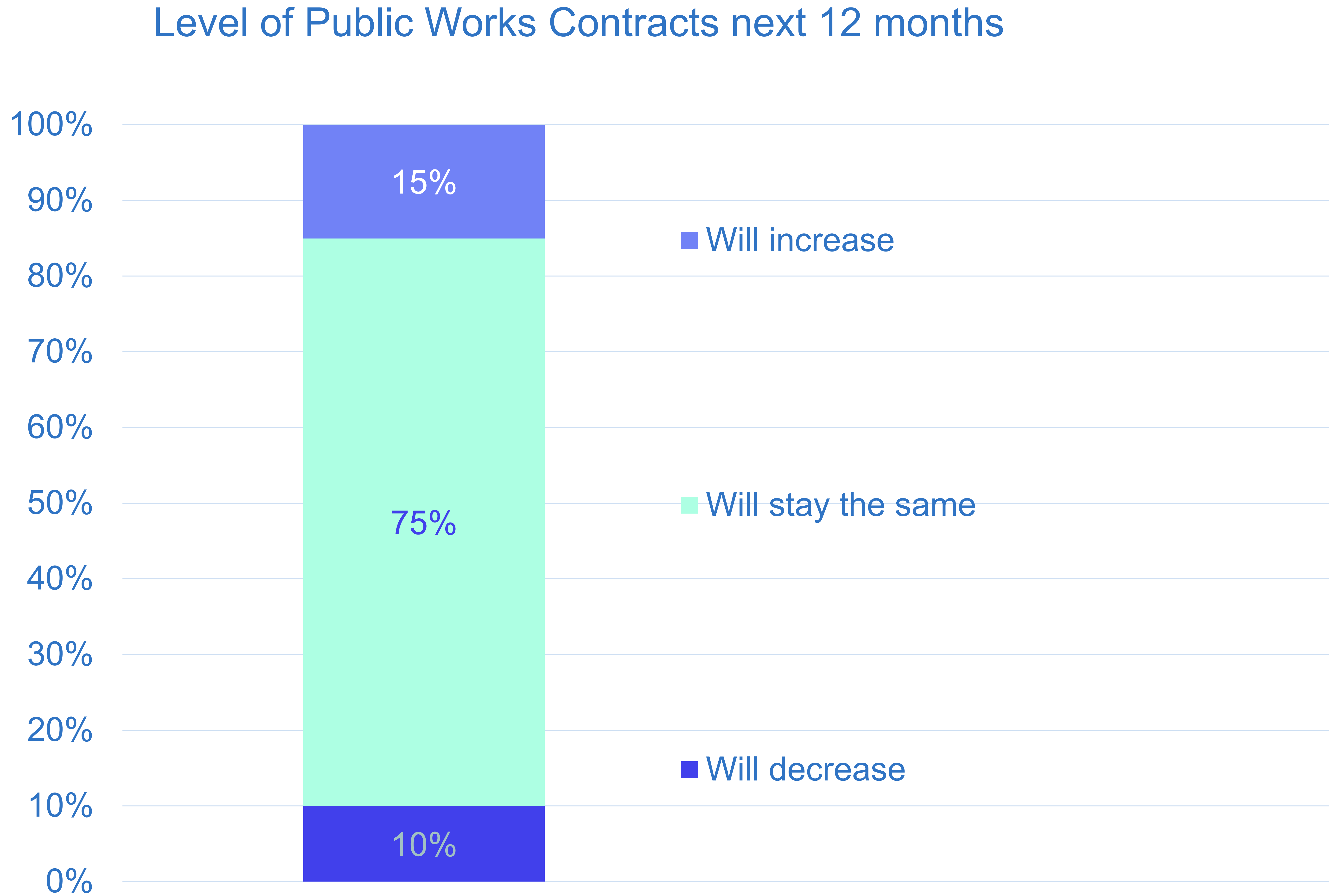
# Public Works Contracts projected as a % of Turnover Q3 2025

**We can see this trend continuing into Q3 2025 with 69% of companies expecting no/low involvement with Public Works Contracts**




Q23. In the next 3 months, approximately what % (based on turnover) of your order book will be from Public Works Contracts? (Base: All respondents = 110)

# Expected level of Public Works Contracts in the next 12 months




(Base: All respondents = 110)

Q24. Do you expect the level of Public Works Contracts on your order book to increase, decrease, or stay the same over the next 12 months?

15%

of companies expect the level of their involvement in Public Works Contracts to increase in the next 12 months.

10% of companies currently carrying out public works expect to reduce their level of Public Works Contracts citing the following reasons:

1) Lowest price award criteria
2) Margin too low
3) Too much bureaucracy
4) Cost of tendering
5) Delays in the award of tenders
6) Projects take too long to complete

# Conclusions

# Conclusions

30%

report an increase in turnover YOY in Q2 2025 with 40% expecting turnover to increase in Q3 2025

30%

of companies report a YOY revenue increase from new orders and 36% of companies expect revenue from new orders to continue to increase into Q3 2025

## At Sectoral Level:

YOY reduction in revenue from new orders across Home Building and General Contracting

There was an increase across Civil Engineering, Infrastructure and Specialist Contracting.

# Conclusions

Increasing costs continue to impact on the pricing of projects with

**49%** acknowledging a YOY increase and 42% expecting continued increases in Q3 2025

**72%**

Report a YOY increase in the cost of raw materials with 68% anticipating the trend to continue into Q3 2025.

# Conclusions

40%

report a YOY increase in business turnover from exports and 40% expect turnover from exports to increase in Q3 2025.

- Data Centres
- Pharmaceutical Plants
- Retail
- *Commercial Offices*
- *Hotels*

# Conclusions

72%

Companies had no/low involvement in Public Works Contracts in Q2.

This trend is set to continue in Q3 2025 with 69% of companies expecting no/low involvement with Public Works Contracts.

# Strategic Policy Perspectives

# CIF Policy

## The Industry has the Capacity to delivery

- Exports and Attractiveness of Public Procurement
- Productivity
- Industry Segments
- Employment
- Business Confidence
- Planning and bureaucratic bottlenecks
- Alignment of NDP and NPF – Activating Land!!
- Viability and Affordabilty
- Pipeline and Certainty/Central Coordination
- Reform of Public Procurement
- Communications and Perception


# CIF Policy

## Top 3 High Level Solutions

- Prioritised Multiannual funding at sufficient levels
- Exemptions to planning for infrastructure and reform of the statutory consents
- Reform of public Procurement and Contracts.

## Action Plan:

- Centralised Coordination and State Bureaucracy
- Multi - annual Investment and Pipeline
- Planning and Consents
- Procurement and Contracting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# Government Policy and Action

## ACTION PLAN???????

**The most significant barriers identified are:**

1. Regulatory Environment –Complexity/Timelines/Collaboration.
2. Planning and Legal Systems – The increasing role that the High Court/JRs
3. Internal Systems – Funding/Project pipeline/Procurement


An Roinn Caiteachais Phoiblí Bonneagair
Athchóiriúcháin Seirbhíse Poiblí agus Digitiúcháin
Department of Public Expenditure Infrastructure
Public Service Reform and Digitalisation

Accelerating Infrastructure
Report on Stakeholder Consultation and Engagement with Emerging Themes on Infrastructure

July 2025

# Government Policy and Action

## Where are we?

- Infrastructure Division
- Review of the NDP
- Accelerating Infrastructure – Task Force
- Preliminary Report – 12 Obstacles
- High Level Prioritisation
- Budget – Funding- VAT and Tax on Apartments


**ACTION PLAN???????**

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# Government Policy and Action

## ACTION PLAN???????

## 12 Barriers:

| | | | |
|---|---|---|---|
| Public Awareness | Increased Regulatory Burden | Risk Aversion | Judical Reviews (JRs) |
| Consequences of JRs | Insufficiently Coordinated Approvals | Slow Processes | Inconsistent Planning Decisions and Timelines |
| Prioritisation and Co-ordination of Infrastructure | Procurement Challenges | Uncertainty of Funding and Project Pipeline | Construction Sector Capacity and Productivity |

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# Government Policy and Action

**What are we hearing?**

- Very positive
- Standardised designs
- VAT/Tax
- Apartment sizes
- Exemptions to planning/consents
- Addressing JRs
- Legislate for projects

**POLITICAL WILL???????**

**Impact: Q3 2026**

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# Thank You

Jeanette Mair

Head of Economic Policy
and Research

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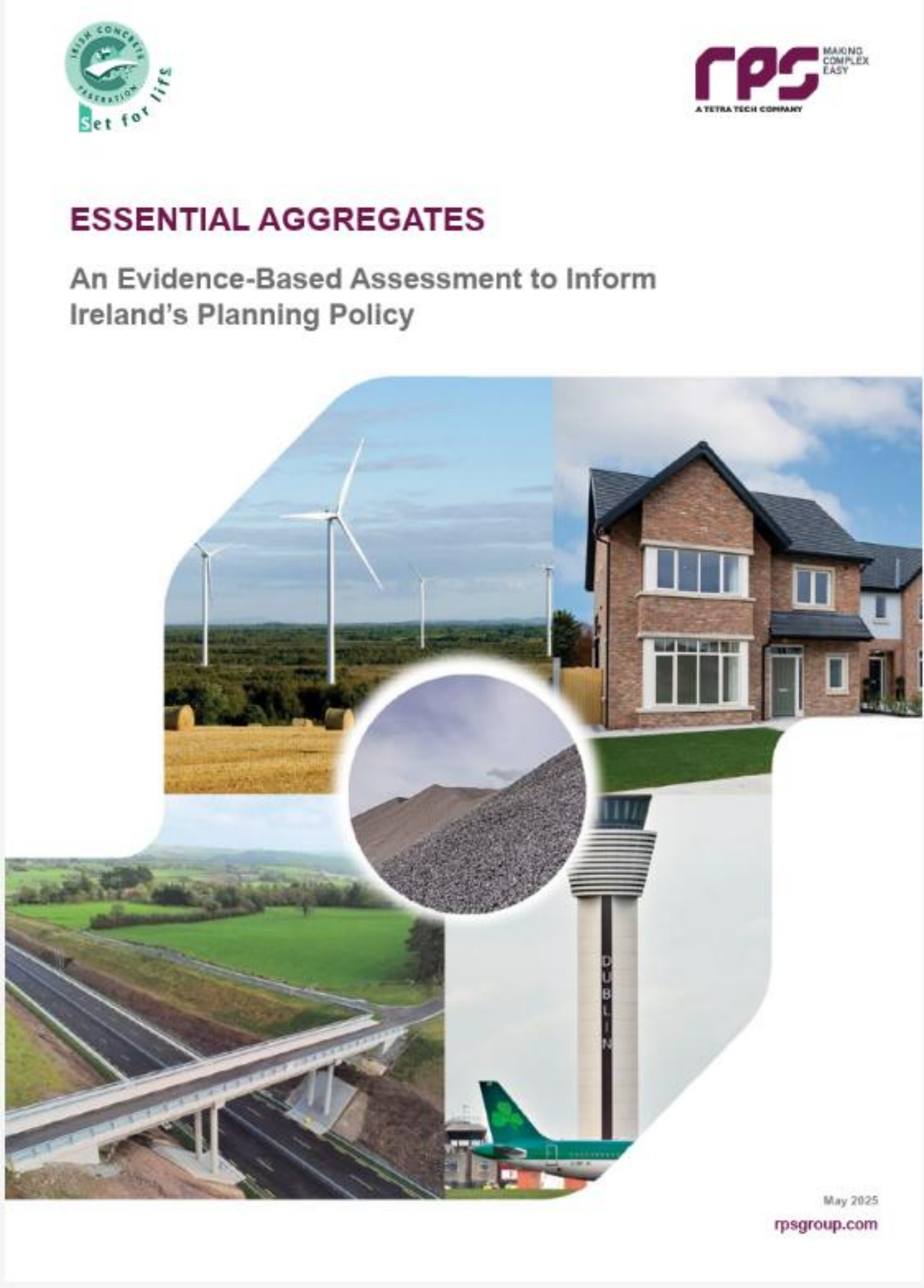
# *Essential Aggregates*

*An Evidence Based Assessment to inform Ireland's Planning Policy*

*Mark Galvin*
*Ardfert Quarry Products and ICF Council Member*



# Quarry Objections

# What the future looks like!

[Write objection to quarry extension in Ireland]

[write objection to quarry extension in proximity to the Lower River Shannon SAC with emphasis on the water framework directive, habitats directive, EIA directive, European and Irish case law]

# *Essential Aggregates*

*An Evidence Based Assessment to inform Ireland's Planning Policy*

*Mark Galvin*
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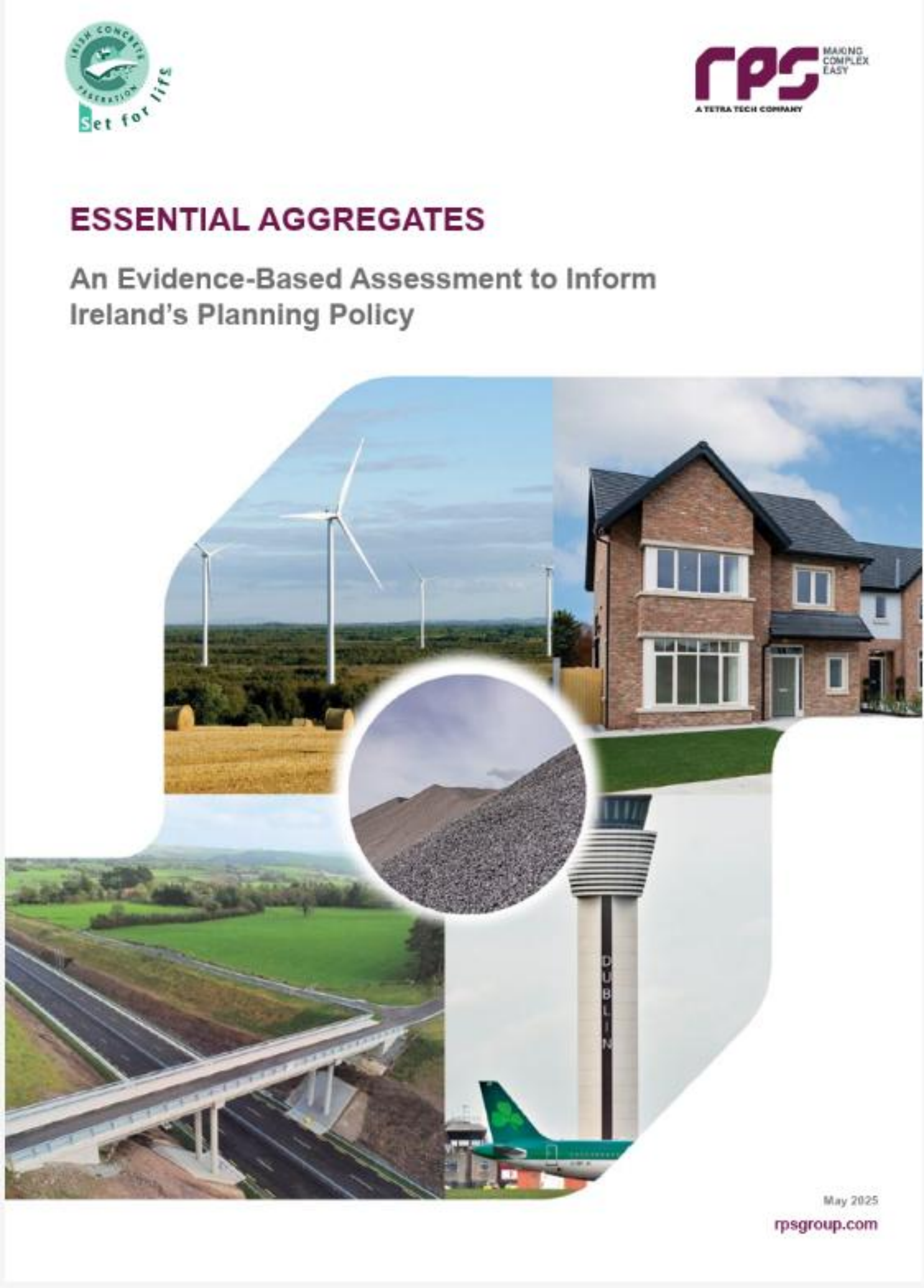
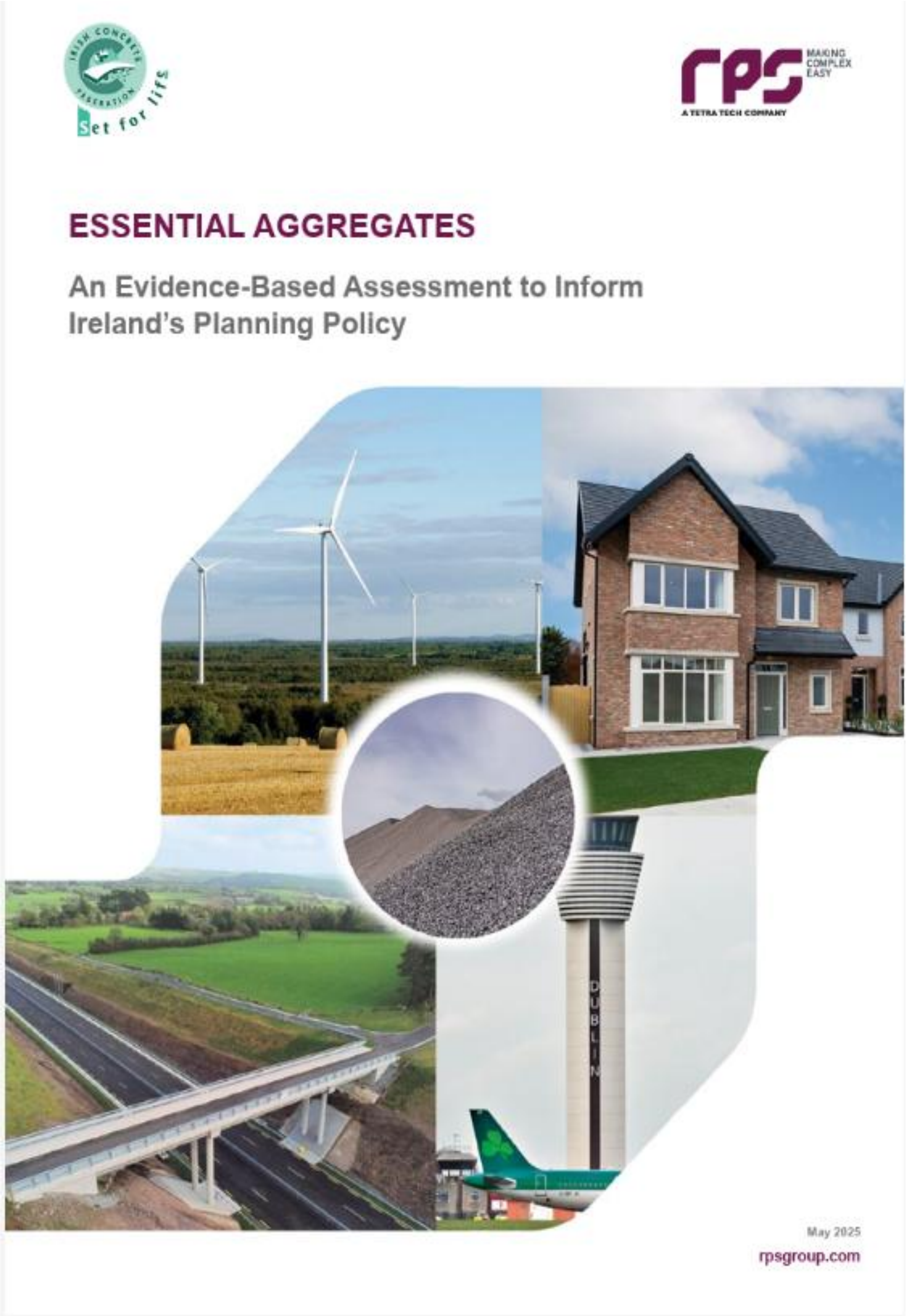
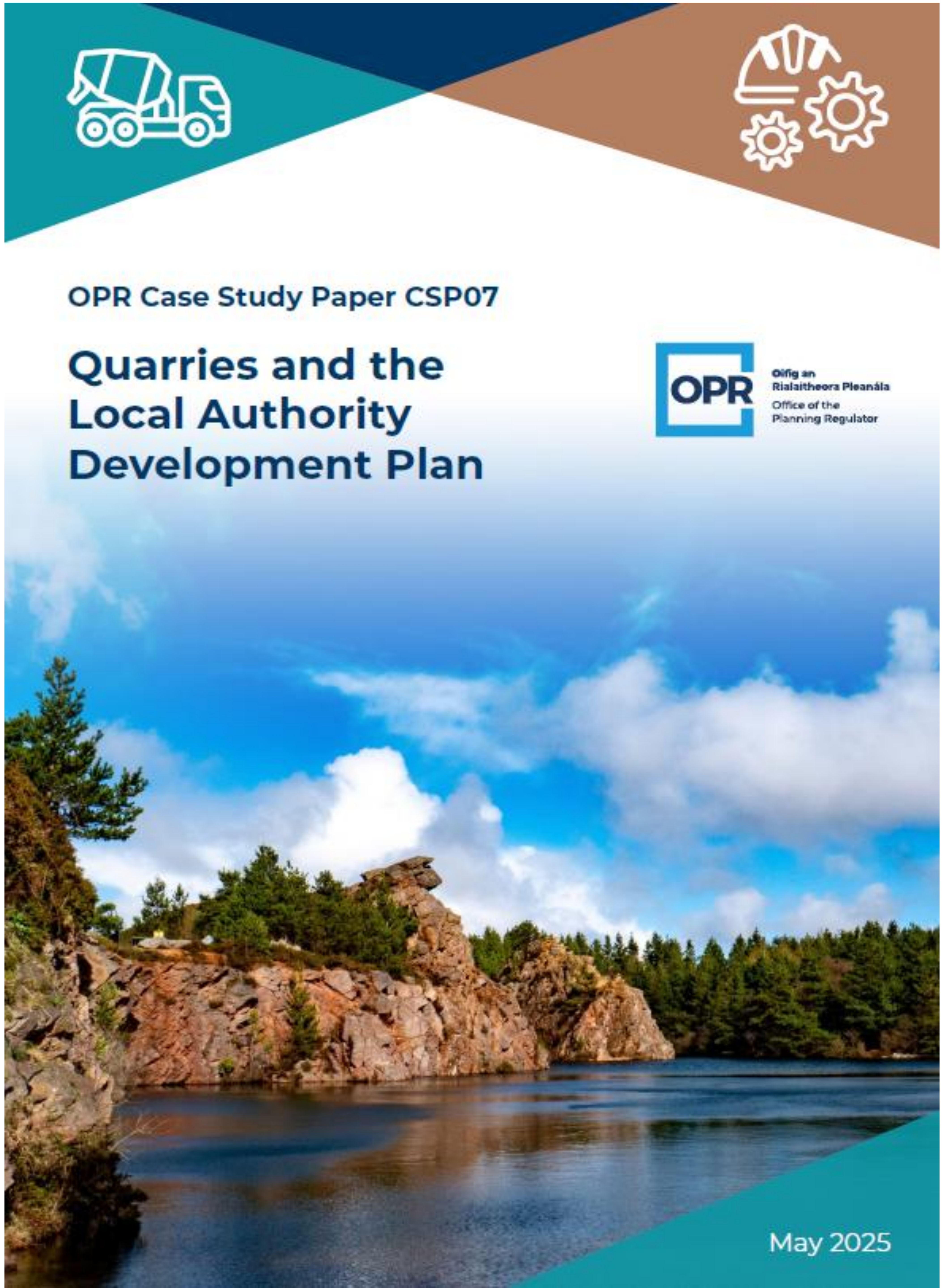


# No point complaining



Irish Concrete Federation
Set for life
rps
MAKING COMPLEX EASY
A TETRA TECH COMPANY
ESSENTIAL AGGREGATES
An Evidence-Based Assessment to Inform Ireland's Planning Policy
DUBLIN
May 2025
rpsgroup.com


OPR Case Study Paper CSP07
Quarries and the Local Authority Development Plan
OPR
Oifig an Rialaitheora Pleanála
Office of the Planning Regulator
May 2025

An Roinn Aeráide, Fuinnimh agus Comhshaoil
Department of Climate, Energy and the Environment


Business Post | October 31, 2025



## Irish Concrete Federation calls for urgent action on future supply of aggregates

The Irish Concrete Federation (ICF) has published a report which highlights critical challenges facing Ireland's future supply of essential aggregates – crushed stone, sand and gravel – upon which the delivery of ambitious national programmes including Housing for All, the National Development Plan, and Project Ireland 2040 are highly dependent.

The report provides an analysis of Ireland's aggregate supply pipeline and was commissioned by ICF and undertaken by RPS Consulting.

ICF estimates that Ireland will require approximately one billion tonnes of aggregates between now and 2040 to meet societal demand.

An Roinn Iompair
Department of Transport

An Roinn Caiteachais Phoiblí Bonneagair Athchóiriúcháin Seirbhíse Poiblí agus Digitiúcháin
Department of Public Expenditure Infrastructure Public Service Reform and Digitalisation

An Roinn Tithíochta, Rialtais Áitiúil agus Oidhreachta
Department of Housing, Local Government and Heritage

An Coimisiún Pleanála

Tionól Réigiúnach an Deiscirt
Southern Regional Assembly

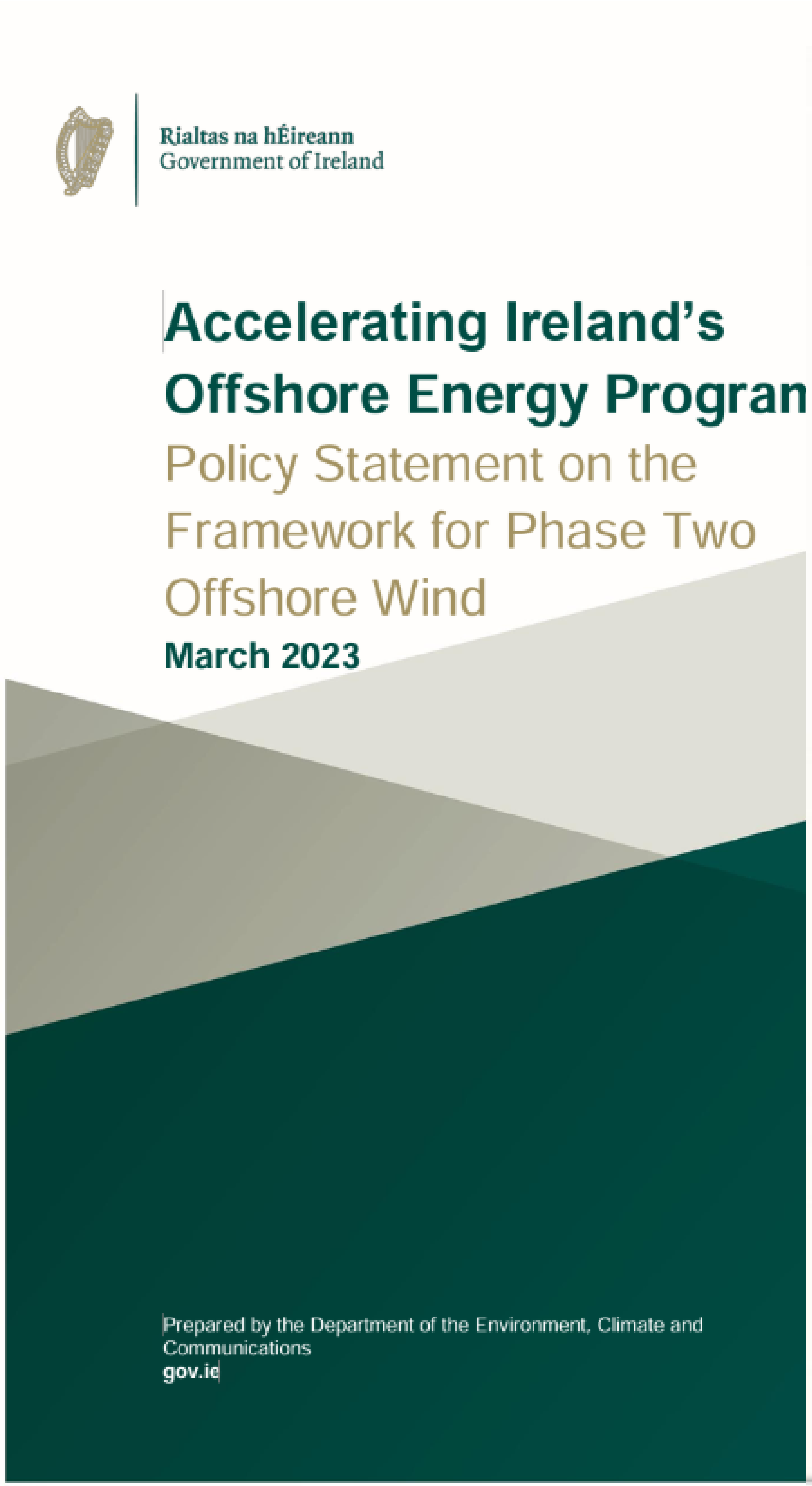
An Roinn Talmhaíochta, Bia agus Mara
Department of Agriculture, Food and the Marine

An Roinn Fiontar, Trádála agus Fostaíochta
Department of Enterprise, Trade and Employment

OPR
Oifig an Rialaitheora Pleanála
Office of the Planning Regulator

Geological Survey
Suirbhéireacht Gheolaíochta
Ireland | Éireann


Rialtas na hÉireann
Government of Ireland
Future Framework for
Offshore Renewable En
Policy Statement
2024


Rialtas na hÉireann
Government of Ireland
Accelerating Ireland's
Offshore Energy Progran
Policy Statement on the
Framework for Phase Two
Offshore Wind
March 2023
Prepared by the Department of the Environment, Climate and Communications
gov.ie

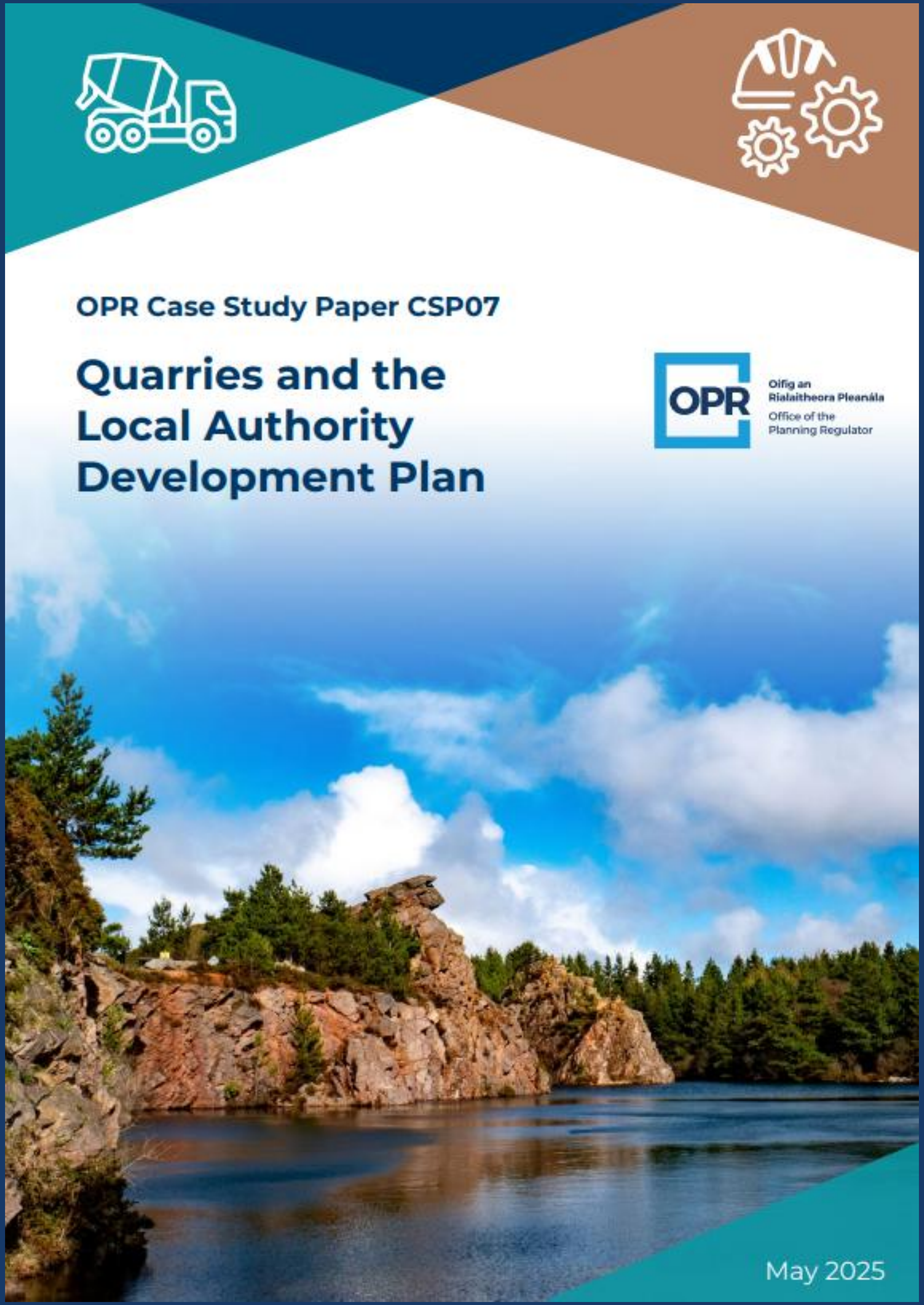

An Roinn Iompair
Department of Transport
Policy Statement on the facilitation of
Offshore Renewable Energy by
Commercial Ports in Ireland
December 2021

OPR

Oifig an Rialaitheora Pleanála

Office of the Planning Regulator

# OPR Case Study Paper CSP07: Quarries and the Local Authority Development Plan




Oifig an Rialaitheora Pleanála
Office of the Planning Regulator

# Role of OPR

- To ensure Local Authorities and An Coimisiún Pleanála correctly implement national and regional policy at all stages of the planning process.
- Put in place programmes of Research, Training and Public Awareness (RTPA).
- OPR is not a policy-making body.

## Three Main Functions:

1. Evaluation of Statutory Plans
2. Planning Reviews and Examinations
3. Education, Training and Research

## Quarries Case Study Paper examined:

- How planning authorities addressed the *Guidelines for Planning Authorities on Quarries and Ancillary Activities 2004*, which are now over 20 years old.
- Wider strategic and statutory policy context (NPF, RSES, Housing for All)
- S261 Registers and the EPA Extractive Industries Register
- Development Plan Policy Review
- Legislative & Transboundary Context

# Project Method

**Phase 1**
Scoping

- Overview of legislative context
- National, regional and local policy review: scoping and desktop review of the National Development Plan (NDP), each Regional Spatial and Economic Strategy (RSES) and development plan policy in relation to quarries and the extractive industry
- Scoping of the EPA's Extractive Industries Register – Section 261 Registration

**Phase 2**
Survey

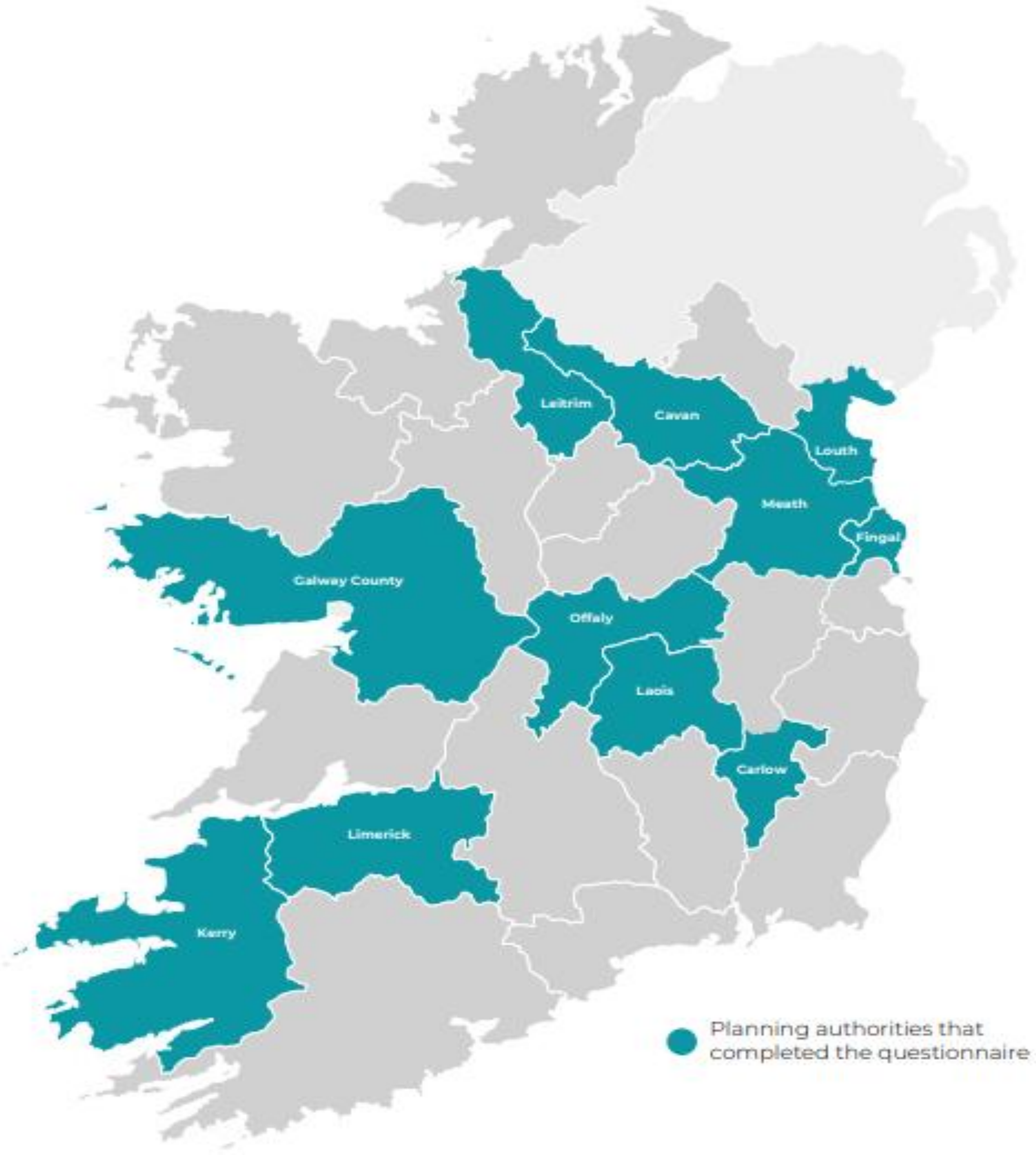
- Quarry questionnaire design
- Selection of planning authorities to complete the questionnaire
- Data collection: questionnaire issued to 11 planning authorities and three regional assemblies. Responses to questionnaires received - 100% response rate

**Phase 3**
Analysis and Reporting

- Analysis of feedback and policy with identification of broad trends
- Highlight best practice examples
- Conclusions and drafting
- Consultation with stakeholders on draft CSP
- CSP finalisation and publication

## CSP informed by:

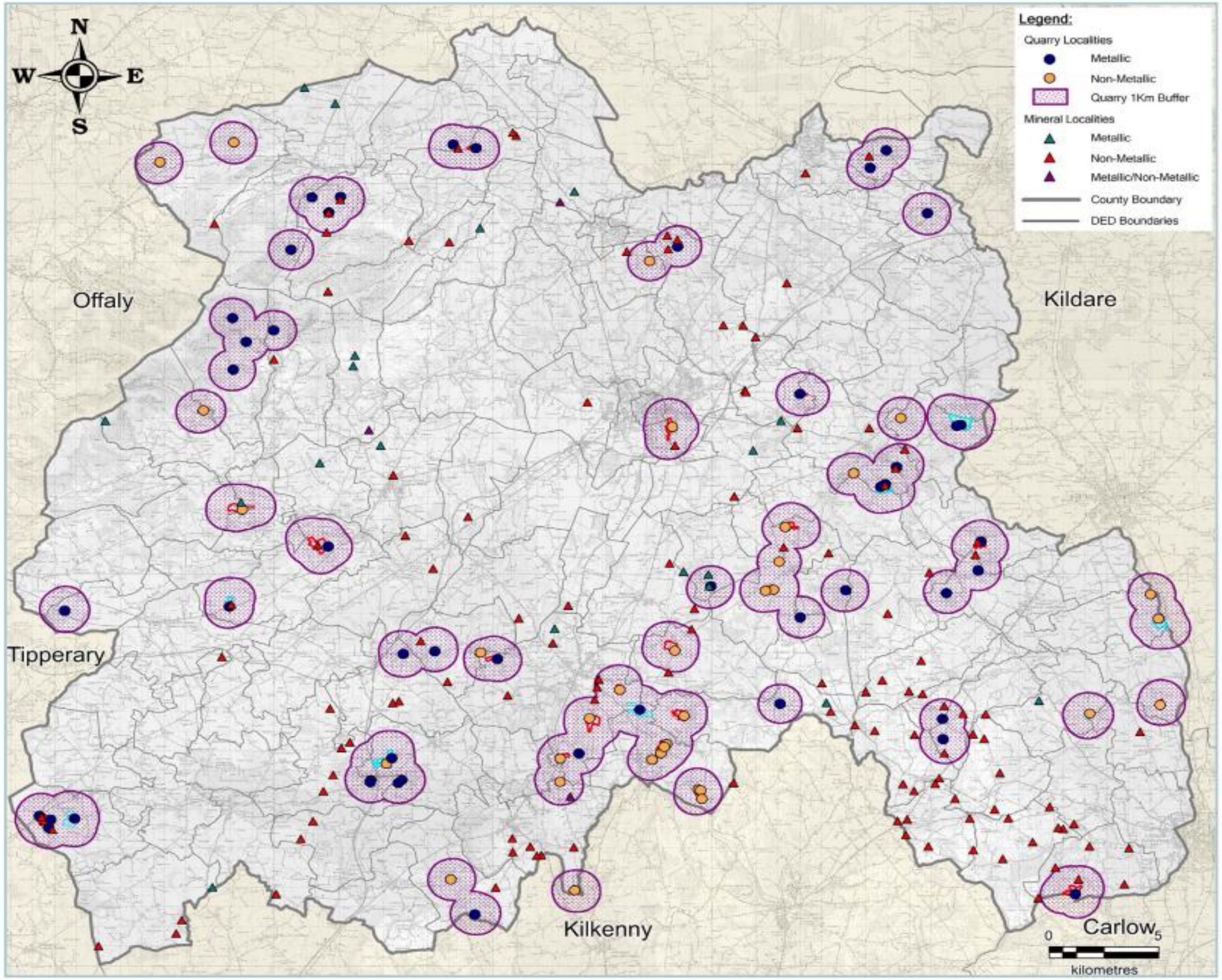
- Analysis of local authority development plans (all except City Councils)
- Sample questionnaire of 11 planning authorities & 3 regional assemblies.
- Engagement with stakeholders (EPA, GSI, DfI (NI))
- Internal OPR team engagement (plans evaluation & reviews)



# Development Plan Analysis: Themes

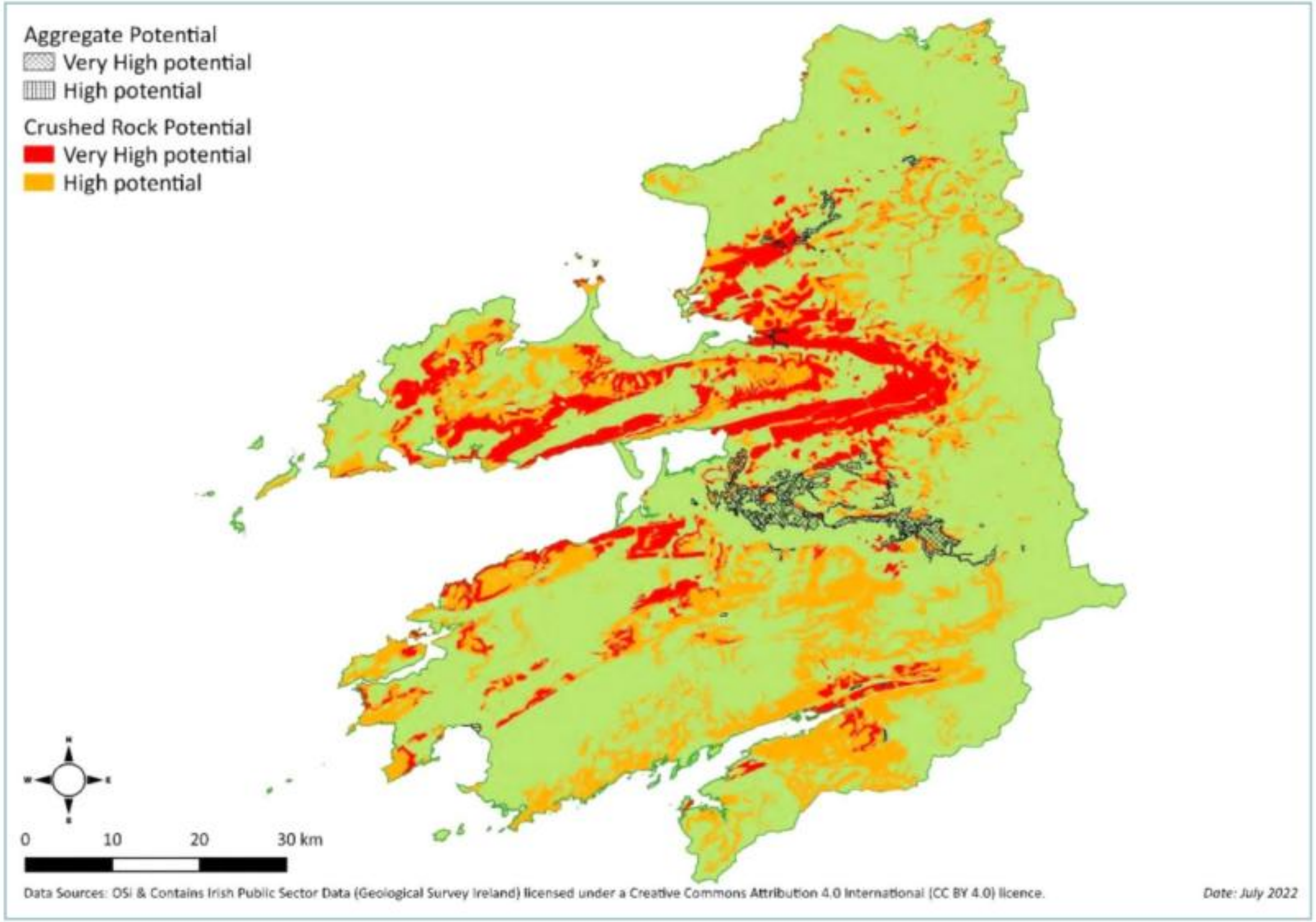
- Safeguarding and Identifying Unique Resources
- Use of data (GSI & integrating into policy)
- Protection of the Environment and Eskers
- Landscape Character Areas and Nationally Unique Landscapes

# Quarrying Sites in County Laois




**Source:** Laois County Development Plan 2021-2027.

# Mineral & Aggregate Potential in County Kerry




**Source:** Kerry County Development Plan 2022-2028.

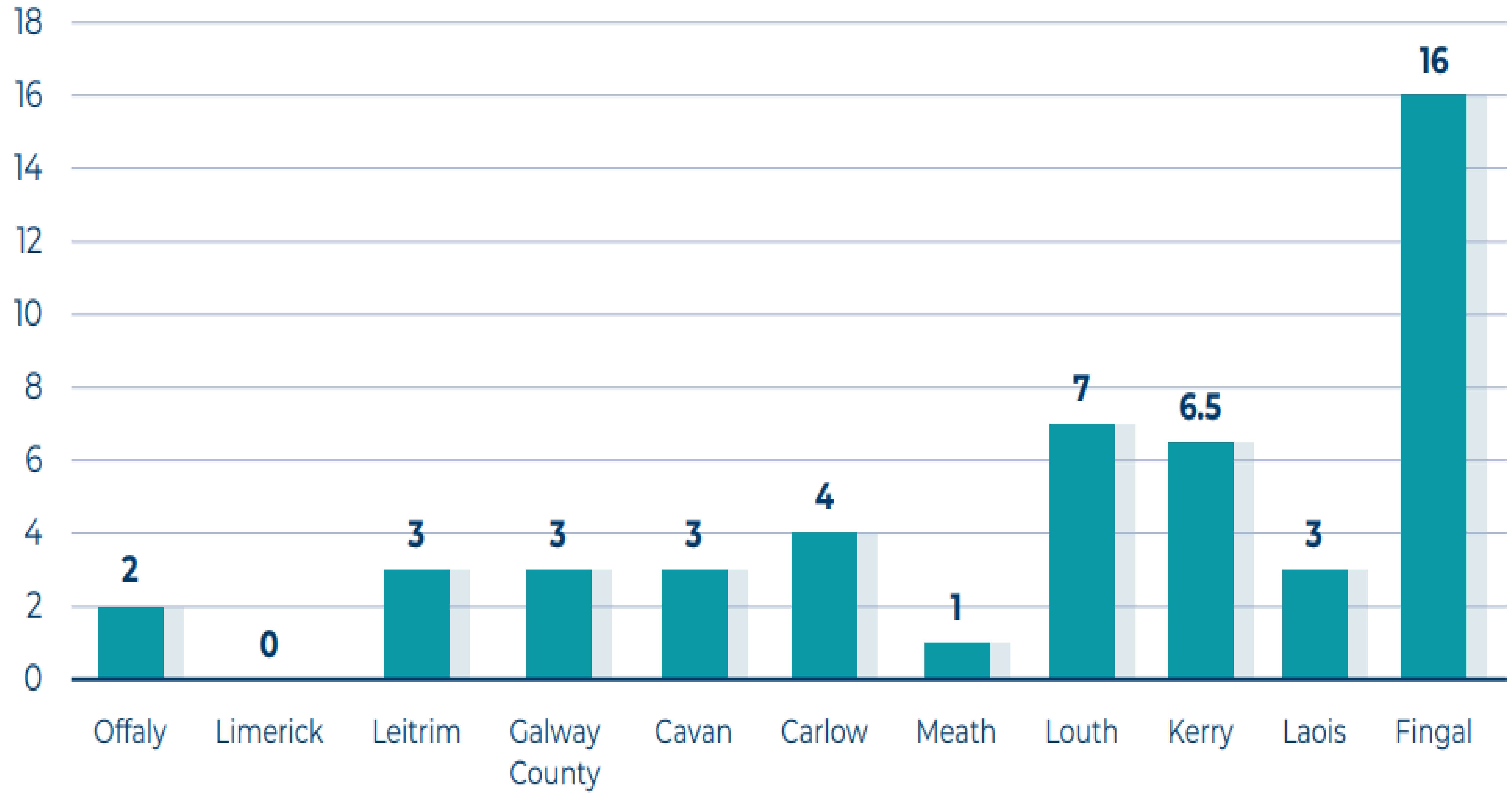
# Geoscience for Planning

- Provides **independent information** to assist **Planning** and **Environmental Assessment** practitioners in Ireland.
- Division of DECC providing information on Development Plans, environmental assessments Strategic Environmental Assessments (EIA, SEA, AA)
- Datasets relatively unknown to practitioners/how to apply them - **New web pages "Geoscience for Planning"**

# LA/ Regional Assembly Questionnaire: Themes

- Quarry Registration
- Complaints and Enforcement
- Legislation, Guidelines and Mapping
- Experience and Suggestions

# Planning Authority Staff Assigned to Planning Enforcement (July 2024)



# Quarry Data – 31 Local Authorities

| | Number of Quarries – as identified in the EPA's Extractive Industries Register | Number of Quarries – as identified in other Published Data Sources (see note below) |
|---|---|---|
| **EMRA** | | |
| Dublin City | 0 | 0 |
| Dún Laoghaire-Rathdown | 0 | X |
| Fingal | 4 | 8 |
| Kildare | 19 | 40 |
| Laois | 31 | 55 |
| Longford | 13 | 15 |
| Louth | 13 | 12 |
| Meath | 76 | 160 |
| Offaly | 26 | 61 |
| South Dublin | 6 | 6 |
| Westmeath | 91 | 42 |
| Wicklow | 27 | 43 |
| **NWRA** | | |
| Cavan | 32 | X |
| Donegal | 0 | 170 |
| Galway City | 4 | 0 |
| Galway County | 230 | 230 |
| Leitrim | 7 | 7 |
| Mayo | 90 | 0 |
| Monaghan | 14 | X |
| Roscommon | 82 | 116 |
| Sligo | 13 | 0 |
| **SRA** | | |
| Carlow | 35 | X |
| Clare | 205 | X |
| Cork City | 0 | 0 |
| Cork County | 1 | 230 |
| Kerry | 142 | X |
| Kilkenny | 29 | X |
| Limerick City and County | 66 | X |
| Tipperary | 152 | 200 |
| Waterford City and County | 19 | 51 |
| Wexford | 36 | 0 |

**Note:** The source of data for the second column includes data from development plans, local authority websites and Section 261/S261A registers. An 'X' has been indicated where data was not available from these official local authority sources.

# Key Findings

- Criticality of aggregates in construction & other supply chains – finite..
- Need supply & demand analysis informing policy development & decisions..
- 2004 Guidelines: broadly robust (benefit from updating & implementation)…
- Better data/more accurate registers & mapping...
- Regionalised approach to resource analysis, policy & enforcement...

# Evidence-Based Approach to Strategic Planning for Renewables

| Region | Energised capacity 2023 (MW) | Additional Renewable Power Capacity Allocations (MW) | Total % of National Share in 2030 | Energised Capacity 2023 (MW) | Additional Renewable Power Capacity Allocations (MW) | Total % of National Share in 2030 |
|---|---|---|---|---|---|---|
| | Onshore Wind | | | Solar PV | | |
| Eastern and Midlands | 284 | 1,966 | 25% | 306 | 3,294 | 45% |
| Northern and Western | 1,761 | 1,389 | 35% | 0.3 | 959 | 12% |
| Southern | 2,622 | 978 | 40% | 138 | 3,302 | 43% |
| **Total** | **4,667** | **4,333** | | **445** | **7,555** | |

# Opportunities

- National picture vs supply and demand (50,000+ homes p.a. and NDP)…
- Vs: input costs & addressing inflationary & env pressures (Co2)…
- Shaping forthcoming reviews of Regional Spatial & Economic Strategies (regionalised demand/supply scenarios (like RE) & CDP's…
- Best practice in sustainability: climate/biodiversity/community gain/after-use…
- Training for local authority staff & elected members…

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Office of the Planning Regulator

# Thank you