# Gateways | Hubs
## Development Index 2012

A Review of Socio-Economic Performance

# SUMMARY Report

Southern & Eastern Regional Assembly

Border, Midland & Western Regional Assembly

May 2013

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A Review of Socio-Economic Performance

# SUMMARY
## Report

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# Preface

This report is a summary of the findings based on a detailed assessment of the socio-economic performance of individual Gateways and Hubs as designated under the National Spatial Strategy (NSS) 2002-2020. This series serves as both an update and progression of the Gateway Development Index (GDI), which was originally compiled and published in 2009[1]. It builds upon the initial study using previously established domains and constituent indicators (or suitable alternatives where necessary and appropriate), while also expanding the Index to encompass the Hub towns for the first time. Accordingly, the Index is hereinafter referred to as the **Gateways and Hubs Development Index (GHDI) 2012**.

With an individual report presenting the updated findings for the relevant Gateway[2], and a Hubs report also available, all of which use the latest available datasets in 2012, the output is presented in the form of an Index, based upon the evaluation of all of the Gateways and Hubs within a series of domains and indicators. This Summary Report will outline the headline trends which have been identified within the assessment.

For reasons of comparability, these datasets were prepared and analysed for both 2006 and 2011. The domains and indicators were, for the most part, previously defined and used within the GDI 2009 report, while some minor adjustments have been introduced[3]. It is important to note that the geographic boundaries upon which the indicators are formulated have changed in all cases. It should also be noted that although both the GDI 2009 and the GHDI 2012 utilise largely the same indicators, they are however not directly comparable due to changes in the boundaries of the various Gateways and Hubs as defined by the Central Statistics Office (CSO) POWSCAR dataset. The GHDI 2012 therefore will compare the performance of the Gateways and Hubs in 2011 and 2006 by retrospectively applying the new framework to the GDI 2009. In addition, the findings of a comprehensive perception survey complement the detailed domain analysis in each Gateway report and in the Hubs report.

It should be noted that, for the purposes of the GHDI study (which is primarily tasked with measuring and monitoring the economic and social performance of each Gateway and Hub given the context of their prescribed NSS role, and the EU Co-Financed Regional Operational Programme investment), two 'Zone' boundaries have been determined to further inform the analysis. These are defined in such a manner that: **Zone 1** reflects the urban cores, i.e. the relevant cities and towns and their environs as defined by the CSO (2011); and, **Zone 2** consists of the wider Gateway/Hub catchment or functional area, where in excess of 20% of the resident population in employment commutes to the urban core (**Zone 1**) to work. The **Zone 2** areas may extend beyond the administrative boundaries of each Gateway/Hub settlement. In many cases, this has resulted in large parts of the surrounding rural hinterland also being included within the study area, which reflects the influence and economic reach which the Gateways have on such areas. Accordingly, the population findings within Gateway and Hub reports should not be directly compared with Regional Planning Guideline (RPG) population targets (as set out within the RPGs and development plans). The CSO derived boundaries of cities/towns

1 Available at: http://www.bmwassembly.ie/publications/other_reports/BMW_GDI_Report.pdf and http://www.seregassembly.ie/images/text_pages/11497_SE_GDI_Report.pdf

2 Reports have been compiled for each of the nine Gateways, with a single report to include all of the Hubs, and this summary Gateways and Hubs Development Index Report

3 A new domain, 'Crime' replaces 'Social Facilities and Networks' as a measure of human capital. The GDI 2009 domain 'Social Facilities and Networks' was largely based on crime statistics in any event. In addition, some minor indicator adjustments have been introduced to some indicators within domains.

(**Zone 1**) will not always capture the full extent of the influence of the Gateway/Hub as there are instances wherein a number of large employment nodes are located outside of the defined **Zone 1** boundaries e.g. Dublin Airport and Shannon Industrial Zone. CSO POWSCAR data is used in the Index to ensure and enable consistency of analysis across all Gateways and Hubs. However anomalies such as those identified may arise.

The remit and scope of this project is focused upon examining the economic and social performance of both the Gateways and Hubs and does not seek to catalogue or identify all investments delivered under national, regional and local investment programmes (information which is publicly available).

The study is co-funded by the European Regional Development Fund (ERDF) under the Regional Operational Programmes 2007-2013 undertaken on behalf of the Border, Midland and Western (BMW) Regional Assembly and the Southern and Eastern (S&E) Regional Assembly by Future Analytics Consulting, in conjunction with Behaviour and Attitudes. A steering committee, (as listed in Appendix 1 to this report) consisting of representatives from the following bodies guided the overall study:

Consultants

Future Analytics Consulting

B&A Consulting

Steering Committee

Border, Midland & Western Regional Assembly – Investing in Your Future

SOUTHERN & EASTERN Regional Assembly – Promoting Our Region

Cumann na mBainisteoirí Contae agus Cathrach – County and City Managers' Association

Comhshaol, Pobal agus Rialtas Áitiúil – Environment, Community and Local Government

An Roinn Caiteachais Phoiblí agus Athchóirithe – Department of Public Expenditure and Reform

Department of the Taoiseach – Roinn an Taoisigh

A series of stakeholder workshops were organised by the BMW and S&E Regional Assemblies, and conducted with the assistance of Future Analytics Consulting and Behaviour and Attitudes (a list of attendees is contained in Appendix 2 to this report). The feedback from these workshops was instrumental in informing the compilation and presentation of the final reports.

The Steering Committee would like to sincerely thank all those who attended the workshops and contributed to the overall project outputs.

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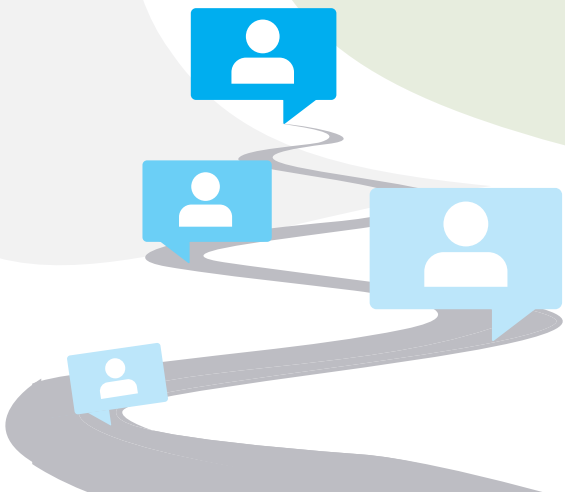
## Summary Report





# 1.0 Introduction

Future Analytics Consulting, together with Behaviour and Attitudes, have been commissioned by Ireland's two NUTS II level Regional Assemblies, the Border, Midland and Western Regional Assembly and Southern and Eastern Regional Assembly, to compile the **Gateways and Hubs Development Index (GHDI) 2012**[4]. This involves undertaking a detailed assessment of the socio-economic performance of those cities and towns designated as Gateways and Hubs under the National Spatial Strategy (NSS) 2002-2020. The study is an update and progression of the Gateway Development Index (GDI), which was originally compiled and published in 2009[5]. The GDI 2009 was the first stage in an ongoing process to monitor the development and performance of Ireland's key growth drivers. Building upon the established methodology adopted from the GDI 2009, the Index is now updated using data available to year-end 2012 (while taking due cognisance of both new available data sources along with emerging limitations on data availability) and is expanded to encompass the Hub towns for the first time.

The final output of the GHDI 2012 study is eleven individual reports, comprising the individual examination of nine Gateways (both Mallow and Tuam are provided as appendices to Cork and Galway respectively), a single Hubs report which encompasses analysis for all nine Hub towns and this Summary Report which provides an overview of findings.

It should also be noted that the data analysis and resultant mapping produced within the study have been specifically constructed to facilitate full transferral onto the Department of Environment, Community and Local Government planning portal, www.myplan.ie. In addition there is an opportunity to transfer data and mapping onto the All-Island Research Observatory (AIRO) portal (www.airo.ie) based at the National Institute for Regional and Spatial Analysis (NIRSA) in the National University of Ireland, Maynooth. Accordingly, the study is seen as a resource and not simply a one-off publication, and should inform future policy direction.

The recently unveiled local and regional government reform measure, contained within the reform programme 'Putting People First: Action Programme for Effective Local Government'[6], is intended as a comprehensive mechanism for the reform of local government in Ireland. Local and Regional bodies are involved in the development and implementation of policies and the provision of funds which are designed to give effect to the strategic goals of the NSS. The establishment of three regional assemblies, as well as the amalgamation of a number of local authorities, as set out in 'Putting People First', will have an important impact in relation to the delivery of services and funding, and the creation of policies in support of individual Gateways.

4 www.bmwassembly.ie/Gateways%20and%20Hubs%20Report/index.html
www.seregassembly.ie/en/info/gateways_hubs
5Available at: http://www.bmwassembly.ie/publications/other_reports/BMW_GDI_Report.pdf and http://www.seregassembly.ie/images/text_pages/11497_SE_GDI_Report.pdf
6 Department of Environment, Community and Local Government (2012) Putting People First: Action Programme for Effective Local Government. Dublin: Stationary Office. Available at: http://www.environ.ie/en/Publications/LocalGovernment/Administration/FileDownLoad,31309,en.pdf

The three new assemblies will be as follows:

- Southern Region Assembly which will evolve from the existing Southern and Eastern Regional Assembly (consisting of Munster and the south-east counties of Carlow, Kilkenny and Wexford);
- an Eastern and Midland Region Assembly which will be newly established (consisting of the province of Leinster other than the south-east counties in the Southern Region); and
- a Connacht-Ulster Region Assembly which will evolve from the existing Border, Midland and Western Regional Assembly (consisting of the province of Connaught and the counties along the Border with Northern Ireland other than County Louth).

These will assume all of the responsibilities previously held by the eight Regional Authorities within the context of the NSS. This means that these assemblies will now be responsible for the delivery and administration of regional and economic strategies, including the continued management of EU Regional Operational Programmes, all of which will be influential in the future development of the designated Gateways and Hubs, as well as the continuing implementation of the Regional Planning Guidelines (RPGs), which will run until 2016, pending their replacement by the new regional economic strategies, the preparation of which will commence in 2014/15.

The Department of Environment, Community and Local Government (DoECLG) recently announced their intention to undertake a full review of the NSS to be completed by the end of 2014 or early 2015. The outcome of this review will have an important bearing on the future development of Ireland's Gateways and Hubs and will have implications which will inform Ireland's approach to regional policy[7].

## 1.1 Utilisation of the Gateways and Hubs Development Index to Inform Policy

The continued pursuance of balanced regional development and the advancement of designated areas to drive regional growth (such as Gateways and Hubs) should be seen as an integral part of the economic policy. The GHDI 2012 presents a comprehensive socio-economic database to inform decisions about the strategic direction while presenting an overview of the performance and progression of Ireland's primary urban centres and drivers of our economy. The manner in which it has been designed and compiled allows for it to be scalable from the individual Gateway and Hub level to other urban centres, as well as being intended for ongoing update and renewal. In this way, it can be used to inform the formulation and implementation of successor regional development policies.

The GDI 2009 was originally conceived as a method of measuring the quality of life within each Gateway. However, as the project evolved, it became clear that the Index would be more meaningful by measuring the level of development within the context of both economic and social performance which each Gateway had

7 This announcement was made by Minister for the Environment, Community and Local Government, Phil Hogan T.D, at the Regional Studies Association 'New Regional Governance in Ireland' Conference held on 21st January 2013.

experienced[8]. The compilation of GHDI 2012 follows the approach used for the construction of the GDI 2009 and includes the Hub towns for the first time. The resulting datasets offer a useful insight into the impacts of the challenging economic environment in which Ireland presently finds itself. A full picture is presented of each Gateway and Hub through an evaluation of the changes which have taken place across each of the eight domains. These domains include (i) Population; (ii) Enterprise and Employment; (iii) Knowledge and Innovation; (iv) Natural and Physical Environment; (v) Transport and Connectivity; (vi) Health and Wellness; (vii) Crime; and (viii) Affluence and Deprivation.

Informed by the outputs produced by the GHDI 2012 opportunities exist for the development of policies and programmes which can further the future development of Ireland's Gateways and Hubs.

**Specific details on the overall performance of each of the Gateways can be found in the relevant individual Gateway reports, while details on all of the Hubs are included within the Hubs report.**

8 GDI 2009, p.15

# 2.0 Methodology

The methodology applied is grounded upon the approach developed under the Gateway Development Index (GDI) 2009. The Index is based around eight individual domains or thematic areas, each of which consist of a number of indicators or data variables, which contribute to building up an evidence-base into the socio-economic performance of the Gateways and Hubs.

For example, the 'Population' domain includes the 'Population Growth' indicator (the actual change in the number of persons resident within the defined area), and is supplemented by a second indicator, 'Age Vibrancy', which considers the number of those within the age cohorts of children under 15 years and adults 65 years and older as a proportion of the total population. The data is set against two geographical zones established using the Census 2011 settlement and labour market flow data (as described in section 2.1 below). From these domain assessments, a Gateway/Hub score is calculated based on figures for the combined Gateway, in addition to scores for the individual **Zone 1** (urban core) and **Zone 2** (wider functional area) areas.

In as much as was possible, the methodology which has been used in the GHDI 2012 remained faithful to that of the original study. However, in some circumstances, this was not possible, as the data sources which informed the original indicators were no longer available. This can be explained further by briefly considering the overall approach taken and the composition of the domains which make up the Index.

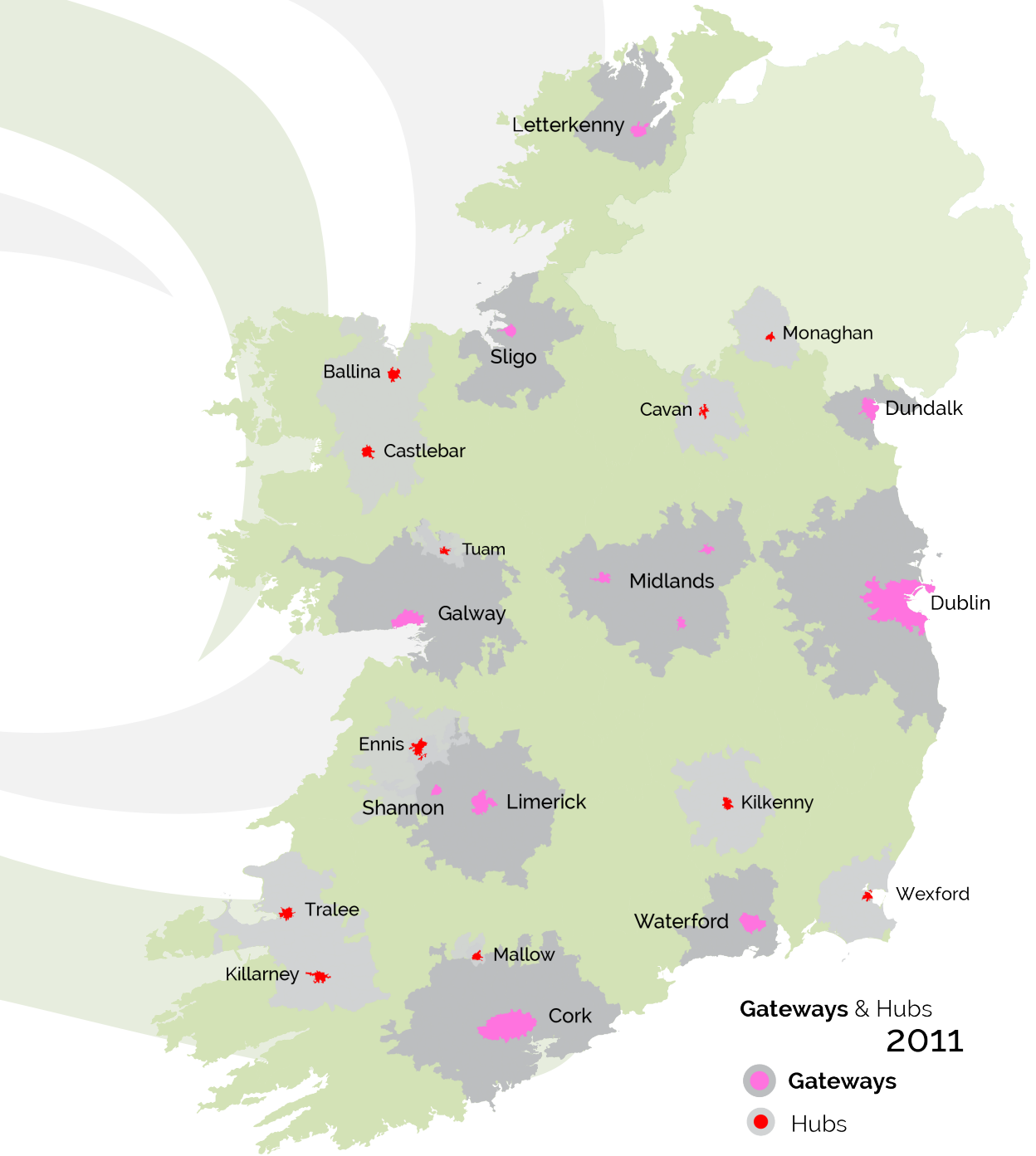
**A technical manual (Technical Manual for the Gateways and Hubs Development Index 2012, explaining the methodology, domains and indicators in more detail) is available upon request from the Border, Midland and Western Regional Assembly and the Southern and Eastern Regional Assembly.**

## 2.1 Gateways and Hubs Boundaries

The boundaries of the Gateways and Hubs have been defined having regard to their functional area, using Central Statistics Office (CSO) Place of Work, School or College Census of Anonymised Records (POWSCAR) data (used under Licence) derived from the 2011 Census. Each Gateway and Hub is divided into two specific Zones for analysis, with **Zone 1** defined as the city, legal town or small town and environs (as defined by the CSO, 2011), while **Zone 2** has been defined as consisting of District Electoral Divisions (DEDs) where in excess of 20% of the resident population in employment commutes to the Gateway or Hub urban core (**Zone 1**) for work.

The **Zone 2** areas may extend beyond the administrative boundaries of each Gateway or Hub settlement. In many cases, this has resulted in large parts of the surrounding rural hinterland also being included within the study area, which reflects the influence and economic reach which the Gateways and Hubs have on such areas. The CSO derived boundaries of cities/towns (**Zone 1**) will not always capture the full extent of the influence of the Gateway or Hub as there are instances wherein a number of large employment nodes are located outside of the defined **Zone 1** boundaries e.g. Dublin Airport and Shannon Industrial Zone. CSO POWSCAR data is used in the Index to ensure and enable consistency of analysis across all Gateways and Hubs. However anomalies such as those identified may arise.

The use of POWSCAR data facilitates an understanding of the functional area of the Gateway or Hub, to examine its economic reach and to ascertain how it is acting as a driver of growth based on its NSS-identified role. Although the Gateway/Hub boundaries were defined from POWSCAR data, for the purposes of this analysis, data for travel to schools and colleges was not utilised. The rationale for this was to replicate as closely as possible the approach taken in the previous GDI boundary definitions as the travel to schools and colleges was not included in the POWCAR 2006.



## 2.2 Index Domains and Indicators

A breakdown of all domains and their constituent indicators is provided below:


It is prudent to note that the study team has considered each domain and the availability of data therein. Accordingly, while the GHDI 2012 has where possible maintained the approach adopted by the GDI 2009, there are instances where an adjustment has been made in the methodology or domain/indicator construct. The sections below set out a brief description of the indicators used under each domain, and highlights where a change occurs between the GDI 2009 and the GHDI 2012.

## Population

**Population Growth**
Actual change in the number of persons resident within the defined area. This figure consists of the population of the CSO-defined (2011) urban cores of the Gateway (**Zone 1**), and the surrounding area (**Zone 2**) where more than 20% of the resident population in employment commute to the urban core (Zone1) for the purposes of work (derived from CSO POWSCAR, 2011) . As a regional growth centre, a Gateway's population should typically grow at a pace in excess of the national growth rate (8.24% between 2002 and 2006, and 8.22% between 2006 and 2011). Hubs act in a complementary role to the Gateways as regional growth centres.
**Adjustment from GDI 2009:** No change, but now applied to Hubs also.

**Age Vibrancy of Population**
The number of those within the age cohorts of children 14 years or under and adults 65 years and older, as a proportion of the working population. As regional growth leaders, Gateways and Hubs should experience and attract inward migration of those of working age. Therefore increases in the core working age cohorts (here defined as the 15-64 age cohorts) will occur in successful Gateways and Hubs, and can be identified by measuring changes in relative age dependency rates.
**Adjustment from GDI 2009:** The GDI 2009 took age vibrancy as a proportion of the total population, while the GHDI 2012 refines this to consider it as a proportion of the working population.

## Enterprise and Employment

**New Firm Formation**
The number of Value Added Tax (VAT) registrations by new firms per 1,000 of the labour force. Gateways and Hubs that are developing successfully should experience faster growth rates in new firm formations than the national average.
**Adjustment from GDI 2009:** No change, but now applied to Hubs also.

**Sectoral Base and Provision of Services**
Analysis of the sectoral base, as an indicator[9] of economic activity is informed by the quantity of services within all enterprises of the Gateways and Hubs, and gives a valuable insight into the economic development of the Gateway and Hub. Results are presented as a percentage of all services within the national economy which occur in the Gateway/Hub (the share of services in the economy), and compared with the percentage of the national population which is present within the relevant Gateway/Hub.
**Adjustment from GDI 2009**: No change, but now applied to Hubs also.

9 GeoDirectory is a service, jointly established by An Post and Ordnance Survey Ireland, which provides a complete database of all of the buildings in the Republic of Ireland and their geolocation details. It holds records for 1.8 million properties. The database is regularly updated and no legacy or previous versions are retained. In this case the GeoDirectory (used under licence), provides a snapshot for a particular point in time (Q1 2012). The GeoDirectory has been utilised in this project to determine the level of retail activity and the sectoral base/provision of services in the Gateways (and Hubs).

**Unemployment Rate**
This indicator relates to the number of persons defined as 'unemployed' within the Census 2006 and Census 2011 results[10]. Successfully performing/developing Gateways and Hubs should experience a lower unemployment rate than the national average (in 2006 Ireland's national unemployment rate stood at 4.3%, increasing to nearly 19% in 2011).
**Adjustment from GDI 2009:** The GDI 2009 used the number of those on the Live Register per 100 of the labour force. The GHDI 2012 indicator uses Census derived data instead. For the scale of this study (assessing small areas), it was judged that the Live Register figures were not spatially disaggregated enough to capture unemployment rates at a small scale. The principal reasoning for this is that no spatial boundaries have been defined for each Social Welfare Area Office. The unemployment figures produced here are derived from analysis of Census data at Electoral Division level. The CSO defines unemployed people as "Persons who, in the week before the survey, were without work and available for work within the next two weeks, and had taken specific steps, in the preceding four weeks, to find work"[11].

## Knowledge and Innovation

The construct of this domain has changed. The GDI 2009 used four indicators: Labour Force Quality, Graduate Admissions, Graduate Retention and Third Level Research and Development. Adjustments between the GDI 2009 and GHDI 2012 are set out for each indicator below. For those indicators which were not continued in the GHDI 2012, the reasons for their omission vary. For example, the Higher Education Authority no longer collects Graduate Retention Rates (which used to be collated at a county level). The GHDI 2012 now merges graduate admissions data with third level research and development funding data, forming a 'hybrid' indicator that generates a more informative picture of the performance of Gateways in this domain.

**Labour Force Quality**
This indicator observes the proportion of the Gateway's labour force (within the 15 to 64 age cohorts) with a third level education, thereby demonstrating the Gateway's/Hub's labour force capacity. A skilled and educated workforce is an important element for a successful Gateway, and an essential factor in attracting inward investment.
**Adjustment from GDI 2009:** The GDI 2009 used this indicator with a different composition. The 'Labour Force Quality' indicator used in the GDI 2009 observed the proportion of the adult population (15+ years) with a third level education. The current study refines this further to focus on the labour force cohorts (15-64) with a third level education.

10 The chief difference resulting from this is that the Census records an unemployment rate (based on Principal Economic Status) of 19.0 per cent, compared with the official rate (based on International Labour Office criteria) of 14.3 per cent, as per the Quarterly National Household Survey. Accordingly, the results may appear higher than those typically reported.
11 Central Statistics Office, 2012, This is Ireland: Highlights from Census 2011, Part 2. Appendix 3

**Third Level Research and Development**
This indicator quantifies the amount of research and development (R&D) financial support generated by third level institutions withn the Gateways; it is expressed relative to the number of third level admissions within the Gateway. Successful Gateways will be drivers of innovation, knowledge creation and technology transfer and therefore should feature higher levels of funding for research and development projects. Analysis of this indicator is not conducted for Hubs as only Tralee and Castlebar have third level institutes.
**Adjustment from GDI 2009:** This indicator consists of the merging of two indicators which featured in the GDI 2009. 'Graduate Admissions', the number of third-level admissions as recorded by the Higher Education Authority (HEA), and 'Third-Level R&D', the R&D earnings achieved as recorded by the Higher Education Authority, have been brought together to form a single indicator.

## Natural and Physical Environment

**River Water Quality**
This indicator measures the average biological river water quality. River water quality is one method which can be used to measure the level of pollution which may be present within each Gateway and Hub environment. Assessments of river water quality based on biological water quality criteria are primarily undertaken at a national level by the Environmental Protection Agency[12].
**Adjustment from GDI 2009:** No change, but now applied to Hubs also.

**Consumable Water Infrastructure**
A successful Gateway and Hub should feature reliable water infrastructure for supply to residents and industry alike. This indicator uses water source catchment data to express the proportion of the population in the relevant Gateway and Hub which occurs within the catchment areas of water sources on the Environmental Protection Agency's (EPA) Remedial Action List (RAL)[13].The types of sources assessed in this manner include public water schemes, public group water schemes and private group water schemes originating from surface water, ground water and springs. Water quality testing is carried out by the Water Services Authorities (WSA) using samples taken from various points on the distribution network for households and industry serviced by each water source. The results are reported to the EPA, with compliance assessed against the standards set out in the Drinking Water Regulations. Water sources are listed on the EPA RAL where the infrastructure does not meet the necessary standard or upgrades are required[14].
**Adjustment from GDI 2009:** The approach here is to measure the percentage of the population within the catchment area of those sources on the RAL, whereas the GDI 2009 used a measure of the proportion of the population serviced by drinking water sources which were less than 100% satisfactory.

12 It should be noted that, due to the nature of rivers, pollution which manifests itself at a particular point may not have been generated or entered the water stream at or near that point. The listing by the EPA of water sources on the Remedial Action List does not infer such sources are a cause of imminent public concern.
13 Full details of the EPA Remedial Action List are
Available at: http://www.epa.ie/downloads/pubs/water/drinking/Q3%202012%20RAL%20for%20web.pdf
14 A full breakdown of these standards is Available at: http://www.epa.ie/downloads/pubs/water/drinking/publicwatersupplieshandbook/Section%202.pdf.

### Waste Recovery

This indicator identifies the percentage of all household generated mixed municipal waste which is diverted from landfill for recycling or biological recovery[15]. Good waste management practice, as evidenced by a high percentage of waste diversion, will have positive environmental effects for all Gateways and Hubs and their surroundings, as well as functioning as a "test of local authority environmental management and responsibility"[16].

**Adjustment from GDI 2009:** This is a new indicator, which is considered to enhance the maintenance of the other 'Natural and Physical Environment' indicators.

## Transport and Connectivity

This domain consists of three indicators. The first of these is broken down into three sub-indicators (Green Transport, Travel to Work Times and Public Transport Availability), the collective of which is a capture of sustainability of population development.

### Green Transport Usage

This indicator is used to measure the proportion of people who take advantage of the various sustainable transportation modes including public transport, walking and cycling available within the Gateway and Hub[17]. Amongst the key features of a successful Gateway/Hub will be a good quality public transport network, with a high proportion of utilisation amongst residents, and good pedestrian and cycle linkages, allowing for an adequate choice in transportation modes.

**Adjustment from GDI 2009:** No change, but now also applied to Hubs.

### Travel to Work Times

This indicator is based upon Census respondent's personal experience of the duration of their journey to work[18]. A successful Gateway/Hub will feature a higher proportion of people who will live within 30 minutes of their place of work.

**Adjustment from GDI 2009:** No change, but now also applied to Hubs.

### Public Transport Availability

This indicator[19] is used to assess the availability of public transportation modes within the Gateway/Hub. Accessibility and availability of public transport which facilitates ease of movement for residents of a Gateway/Hub is an important consideration.

**Adjustment from GDI 2009:** This Index has not been updated for 2011 and so the original results have been applied to both the remapped 2009 results and to the 2012 results.

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15 This indicator is based upon data derived from the 2006 and 2011 EPA National Waste Reports. Waste recovery percentages have been generated based on County and City council estimates as reported to the EPA. The chosen methodology identifies all waste which has not been recovered (recycled or biologically treated), and presents it as a percentage of the total of all waste generated (both recovered and residual) within the Gateway.

16 Department of the Environment and Local Government (1998) A Policy Statement: Waste Management, Changing Our Ways, p. 1., Available at: http://www.epa.ie/downloads/pubs/waste/plans/name,11643,en.html

17 This dataset is derived from CSO Census data.

18 This dataset is derived from CSO Census data.

19 Pobal (2006) Towards the Development of a Transport Accessibility Index

**Retail Activity**
This indicator[20] measures the number of retail outlets[21], expressing them per 100 households, within Gateways and Hubs. The provision of essential retail services is an important function of a Gateway or Hub, and the resident population's access is a key factor. The retail sector plays a major role in attracting people to urban centres thus contributing to the overall economic vitality of those centres and supporting their role as centres of social and business interaction in the community[22]. Given that the provision of essential retail services to the Gateway/Hub population is an important function of a successful Gateway or Hub, by investigating the quantity of retail business availability, a clear contribution to the determination of Gateway and Hub performance within the Transport and Connectivity domain can be derived. In general scores at or above the average for all Gateways are satisfactory.
**Adjustment from GDI 2009:** No change, but now applied to Hubs also.

**IT Connectivity**
This indicator quantifies the percentage of households within the Gateway and Hub who have (and are utilising) private access to broadband (not including dial up internet access)[23]. A high proportion of broadband accessibility is an essential feature of a Gateway and Hub.
**Adjustment from GDI 2009:** No change, but now applied to Hubs also.

20 GeoDirectory is a service, jointly established by An Post and Ordnance Survey Ireland, which provides a complete database of all of the buildings in the Republic of Ireland and their geolocation details. It holds records for 1.8 million properties. The database is regularly updated and no legacy or previous versions are retained. In this case the GeoDirectory (used under licence), provides a snapshot for a particular point in time (Q1 2012). The GeoDirectory has been utilised in this project to determine the level of retail activity and the sectoral base/provision of services in the Gateways (and Hubs).
21 This includes all retail outlets as listed within the GeoDirectory, regardless of size, type or character of the individual retail outlets encompassing the following categories: wholesale and retail trade (including food and drink, clothing and footwear, accessories, cosmetics, household appliances, furniture, hardware, agricultural, textiles, computers, telecommunications equipment, books, music, sporting, games), repair of motor vehicles, motorcycles and personal and household goods.
22 Department of Environment, Community and Local Government (2012) Guidelines for Planning Authorities, Retail Planning. Available at: http://www.environ.ie/en/Publications/DevelopmentandHousing/Planning/FileDownLoad,30026,en.pdf
23 'Private access' is defined as those instances where the household has a broadband connection; it is not a measure of broadband enablement in a Gateway or Hub i.e. others on the same street or road may decide not to subscribe, but could if they so wished.

**Mortality**

This indicator is a measure of premature mortality within a Gateway or Hub, and can be used as a measure of the physical health of the population and the quality of life within a Gateway or Hub. Therefore a lower Years of Potential Life Lost (YPLL) score is an indication of a healthy Gateway or Hub population. Years of potential life lost (YPLL[24]) is a mortality measure. It measures, per 1,000 people, the total number of years below the age of 79.6 (life expectancy for an Irish adult[25]) that a 1,000 person group loses. For example, if a person dies before the age of 79.6 years, they contribute to this sum. If they die after this age, they do not contribute to this sum. The YPLL for each 1,000 group of people, averaged across counties in Ireland is between 21.95 and 95.00 (combining both 2006 and 2011 data). The national average for YPLL has reduced from 59.84 to 55.10 in the period 2006-2011. In terms of comparable EU and OECD equivalents the OECD average is 76.7 and 72.6 (2006-2011) and EU is 80.5 and 72.0 (2006-2011)[26].

**Adjustment from GDI 2009:** The GDI 2009 recognised that the rate of premature mortality is an important indicator for the physical health of the population. At that time, the Health Information Unit/Health Service Executive had a dataset for premature mortality rates at county level. It was envisaged that this would be enhanced in the intervening period, but this has not come to fruition. Accordingly, the new indicator construct, utilising YPLL scoring, is considered an appropriate alternative.

**Birth Weight**

This indicator measures the average weight at birth of children born to parents from the Gateway or Hub. The birth weight[27] can be used to provide an accurate indication of the health and well being of mothers within the Gateway or Hub, with higher average birth weights seen as being indicative of a healthier population.

**Adjustment from GDI 2009:** The GDI 2009 acknowledged that average birth weight is a robust indicator for the mother's health and well-being and higher birth weights are thus indicative of a healthy population. However, at that time, birth weight data recorded at maternity hospitals was separated from the mother's residential details and thus could not be connected to a local geographical entity. The GDI 2009 thus could not use this dataset. Subsequent changes in the recording of this data have facilitated the GHDI 2012 in making use of this valuable dataset.

24 YPLL is typically determined per 100,000 of the population, but for the purposes of this study has been scaled down to 'per 1,000 of the population' for comparative purposes (many Gateways have populations less 100,000).

25 The life expectancy for an Irish adult stands at 79.6 years. For the purposes of calculating Years of Potential Life Lost, this was rounded to 80 years in this study. Further information is available from the CSO Life Expectancy Tables at: http://www.cso.ie/Quicktables/GetQuickTables.aspx?FileName=VSA30.asp&TableName=Life+Expectancy&StatisticalProduct=DB_VS.

26 Comparable European and OECD studies which must take into account a wide variety of life expectancies selects a more suitable 65 year value. Meaning that in these studies any individual who dies over the age of 65 does not contribute to the YPLL.

27 Data derived from Health Service Executive datasets.

**Primary Health Care**
This indicator quantifies the number of General Practitioners[28] per 1,000 of the population within each Gateway. This gives an indication of the relative access to primary healthcare for the residents of the Gateway, and can be used as an indication of the longer term health of the population.
**Adjustment from GDI 2009:** The GDI 2009 captured the GPs per capita it is now measured by GPs/1000 of the population. This measure has now also been applied to Hubs.

## Crime

**Crime**
This indicator quantifies the number of crimes per 100 of the population. It contains breakdowns in a number of crime categories[29]. Crime data only includes reported crimes i.e. crimes that become known, or are reported to the Gardaí.
Many crimes are not reported[30]. Crime negatively affects economic and health systems at the national and regional levels. It has been identified as an impediment to foreign investment and a cause of 'capital flight' and 'brain drain'[31].
**Adjustment from GDI 2009:** This overall domain has replaced the Social Facilities and Networks domain which formed part of the GDI 2009, and which was omitted due to a lack of suitable data. This new domain has been included to inform the level of human capital which exists within each Gateway and Hub.

## Affluence and Deprivation

**Affluence and Deprivation[32]**
This indicator measures demographic growth, social class composition and labour market strength to compile a single score for affluence and deprivation. The measurement of affluence and deprivation is an effective method of establishing the performance of Gateways and Hubs, with those featuring high levels of affluence viewed as being successful in comparison with those which feature high levels of deprivation. An in-depth overview of deprivation and affluence is available on the Pobal HP Deprivation Index (Haase and Pratschke, 2012[33]).
**Adjustment from GDI 2009:** No change, but now also applied to Hubs.

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28 Data derived from Health Service Executive dataset.
29 Crime categories: Murder attempts/threats, assaults and harassments; burglary and related offences; controlled drug offences; dangerous or negligent acts; damage to property and the environment; fraud, deception and related offences; public order and social code offences; robbery, extortion and hijacking offences; theft and related offences; and weapons and explosions offences. The breakdowns do not include data on rape, sexual offences and kidnappings due to data protection issues and sensitivity for individual victims who might be easily identified were this information published at Garda station level. Also excluded is the category of 'offences against Government, justice procedures and organisation of crime' a category dominated by offences committed by people in custody and those who breach court orders.
30 CSO (2011) Interpreting Crime Statistics, A background Briefing Note. Available at: http://www.cso.ie/en/media/csoie/releasespublications/documents/crimejustice/current/interpretingcrimestats.pdf.
31 UN Habitat (2007) Global Report on Human Settlements, Enhancing Urban Safety and Security: Part II Urban Crime and Violence, p.46.
32 This indicator is based on the Pobal HP Deprivation Index (Haase and Pratschke, 2012). Available at: https://www.pobal.ie/Pages/New-Measures.aspx.
33 Ibid.

## 2.3 Perception Survey

In association with the overall data gathering and analysis of the GHDI 2012, a perception survey was also undertaken. The aim of this was to provide some insight into the awareness which the residents of each Gateway and Hub had for the functions and benefits which the designation brought with it.

An extensive survey was undertaken in October 2012, which largely replicated the GDI 2009 survey for reasons of comparability. The GDI 2009 perception survey was conducted in September 2008. In addition, some new questions were incorporated, which were considered to provide further insight into awareness and change in the Gateways and Hubs.

The perception survey was more extensive in the Gateways than in the Hubs and, after a thorough review of the results, it was considered most appropriate to make use of the Gateway survey results individually, while the Hubs survey was more suited to consideration at a strategic level.

The perception study in the GHDI 2012 involved a common survey, using on-street interviews with a random sample of the adult resident population in each Gateway. The research sample included the main urban zones of each Gateway as well as those areas in close connectivity with each urban zone. Importantly, the survey fieldwork was structured so that the sample in each Gateway is as representative as possible of residents at each location.

In each Gateway, interviewing was spread across at least one full week and was structured so that each day of the week and each time of day were represented in the survey. Over 250 interviews were conducted in each Gateway, with over 2,300 interviews being conducted in total across the full nine Gateways and 750 interviews in total across the nine Hubs. The statistical margin of error on a sample size of 2,300 is just +/- 2%; the margin of error on a sample of 750 is +/- 3.7% and +/- 0.37 on the 10 point scales, while on a sample size of 250 is +/- 6.2% and +/- 0.62 on the 10 point scales. In this survey, any measure for an individual Gateway that is within 6% of the survey average is considered to be 'at the Gateway Average', while any measure for the Hubs as a whole which is within 4% of the survey average is considered to be 'at the Hubs Average'. The survey questionnaire asked Gateway residents to comment on each of the following subjects:


The results of the perception survey are discussed within the individual Gateway reports and, at a strategic level, within the Hubs report.

# 3.0 Data Availability

One of the key issues that emerged during the development of the GHDI 2012 study was the availability of accurate and reliable data, especially at the level of spatial disaggregation which is required for a study of this type. Within the GDI 2009 report, the authors also raised the issue of data availability at the required scales, as well as the suitability of the data which was available.

The National Statistics Board (NSB) focuses on the strategic development of the Irish statistical system. One of the strategic priorities of the NSB, for the period 2009-2014, is focused on ensuring "…official statistics are fit for purpose by balancing relevance, timeliness, cost and quality of data so that critical data gaps are filled and new demands are met"[34]. In addition to this, the scale at which data is available must be considered, as there are numerous datasets which the study team considered making use of, but were precluded from their subsequent application because the datasets were not conducive to an assessment at the level of the **Zone 1** and **Zone 2** boundaries utilised within the Gateways and Hubs analysis.

## 3.1 Data Challenges

### 3.1.1 Census

The 2011 Census has been an important source for the Index, in particular the application of travel to work data (availed of under licence from the CSO) to determine functional areas of Gateways and Hubs forming the foundation for this analysis. Data from the Census is for the most part, freely available (with the exception of a small number of indicators which required the application of special tabulations) and is a robust representation of the performance and situation for each county, city, town, electoral district and small area throughout the country. We did come across one of the Census questions which proved to be a valuable source of data for the GDI 2009 (regarding community participation) and which was extracted from the 2006 Census was no longer replicated in the 2011 Census. The importance of the Census to inform policy and programming decisions cannot be overstated and its update in 2016 should continue to be a priority for Government.

### 3.1.2 Complementarily with Northern Ireland Data

Another important data challenge was in the area of data sources from Northern Ireland. Two of the Gateways (Letterkenny and Dundalk) together with two of the Hub towns (Cavan and Monaghan) are located in close proximity to the border with Northern Ireland, and feature hinterlands which are located on both sides of this border. The Letterkenny Gateway, which is conceived as a cross-border linked Gateway in conjunction with the Northern Ireland city of Derry, has only been assessed on data produced by the Central Statistics Office for the Republic of Ireland, and although the real impact of this cannot be accurately determined, it can be assumed that this lack of data from the Northern Ireland element of the Gateway will have had a negative impact on its overall score. The GHDI 2012 study has, therefore, considered Letterkenny as a Gateway in its own right, with a brief discussion on the cross-border element.

34 National Statistics Board (2009) Strategy for Statistics 2009-2014. Available at: http://www.nsb.ie/media/nsbie/pdfdocs/StrategyforStatistics2009-2014.pdf

### 3.1.3 Capturing Emigration

One of the major challenges impacting upon the performance for Ireland's Gateways and Hubs is the outward migration of residents owing to the fragile economic climate and more limited labour market opportunities. This not only will this have impacted on the population indicator considered in the Index but also on age vibrancy, new firm formation (a constrained entrepreneurial environment) and labour force quality (capacity of Gateway and Hub economies to retain graduates and skilled workers). Population and migration estimates published by the CSO, estimate emigration from Ireland in the twelve months to April 2012 to have increased to 87,100 from 80,600 in the year to April 2011, while the number of immigrants is estimated to have fallen marginally to 52,700 from 53,300 over the same period. These combined changes resulted in an increase in the net outward migration from 27,400 in the year to April 2011 to 34,400 in the year to April 2012[35]. These estimates underline a persistent net outward migration with just a minor decrease evident from the April 2010 figure of 34,500 which was the highest level of net outward migration since 1989[36].
While the CSO produces the data on migration estimates[37] these remain at regional authority (NUTS III) level and therefore do not fully inform the extent to which emigration is restricting Gateway and Hub development.

## 3.2 Data Opportunities

Within the stakeholder workshops undertaken as part of the GHDI 2012 study, there were a number of suggestions made regarding the sourcing and provision of data. Given the principal remit of the GHDI 2012 is to monitor and assess the socio-economic performance of the Gateways and Hubs, this section briefly outlines some of the opportunities regarding data provision which would enhance future phases of the Index and policy and decision-making in general.

### 3.2.1 A Proposed National and Regional Data Infrastructure

What is needed to facilitate this is not just joined-up thinking, but a common and homogeneous manner for the collection, storage and harmonisation of data. Without this, a very significant opportunity to enhance the evidence-base within Ireland, through the development of a comprehensive data resource, will not be achieved.

An opportunity exists for the development of a National and Regional Data Infrastructure, compromising three key pillars: (i) people, (ii) businesses and (iii) buildings. Each of these pillars would be supported by a register for persons, businesses and buildings (commercial and residential). Each of these registers would be organised around a single, unique identifier. The Personal Public Service Number (PPSN) would be the identifier used to populate the person register. A unique business identifier would be the basis of the Business Register. A unique spatial (x and y coordinates) identifier, sometimes referred to as a postcode, would be used to organise the Buildings Register. Any interaction with public (national and local) authorities would require mandatory use of these identifiers. If all administrative data were organised thus, detailed regional and local level data could be compiled regularly and at relatively little cost. It should also be noted that such a data infrastructure will be necessary to deliver the Public Service Reform Plan.

35 Population and Migration Estimates, April 2012 (with revisions from April 2007 to April 2011), published by the Central Statistics Office, Ireland, September, 2012.
36 Population and Migration Estimates, April 2010, published by the Central Statistics Office, Ireland, September, 2010.
37http://www.cso.ie/en/media/csoie/releasespublications/documents/latestheadlinefigures/popmig_2012.pdf

### 3.2.2 Harmonisation of Local Authority Data

There is a distinct opportunity among Local Authorities (Town, County and City Councils) to agree a set of core Local Authority data. This should share common coding, classification and overall data structure. Regional and local analysis and performance assessment could be greatly enhanced by this move, and there could be direct synergies through interaction among neighbouring Local Authorities.

### 3.2.3 Organisation of Administrative Data

It is suggested that administrative data should be aligned to support regional structures. Designing a logical regional structure would allow administrative data to be organised in a complementary fashion. There are a large number of data sources which are held by various government departments, state and semi-state companies and Local Authorities (as above), which could prove to be valuable sources of information for the ongoing process of updating this study. As can be seen from the use of POWSCAR, such data can be presented in such a way that allows it to be of beneficial use while still maintaining the anonymity of the persons from whom the information has been derived. Such data sources include retail floor space within a given area which is available in some urban areas (indeed, it forms part of a Retail Strategy within Town, City and County Development Plans) but is often not maintained for the wider county or region.

The GDI 2009 identified the interest of many public bodies in sharing spatial datasets and demonstrated the potential of spatial datasets to improve our understanding of the performance of places over time. Despite the interest and goodwill among these public bodies to share and utilise the many public sources of data, unfortunately it would appear that less progress has been made in overcoming the many obstacles to this utilisation, such as scalability, structuring integration and issues surrounding compatibility.

### 3.2.4 International Comparison

The GHDI 2012 study is not intended to include an international comparison (although some European averages are used to complement indicator assessment). From a data perspective however, it would be useful to make use of the CSO indicator series where possible, as the national and international data are already compiled. As has been identified in the construction of the GHDI 2012, sub-national equivalent data may not be available in many instances.

### 3.2.5 Alignment with Regional Indicators

It is important to achieve coherency among indicators to ensure that they are user-friendly and fit-for-purpose by policy makers. The Regional Planning Network and the Department of Environment, Community and Local Government are currently developing a set of indicators for regional planning in Ireland. In addition, the National Institute for Regional and Spatial Analysis (NIRSA), National University of Ireland Maynooth, is the lead project partners on the ESPON project[38] 'Key Indicators for Territorial Cohesion and Spatial Planning (KITKASP)'. There is a strong rationale to develop these indicator series as a nested set of indicators at different spatial scales. This would facilitate a user to query the performance of a region and then the performance of a Gateway or Hub within that region.

38 Further information can be accessed at: http://www.espon.eu/main/Menu_Projects/Menu_TargetedAnalyses/kitcasp.html

The above-mentioned projects have been working to align indicators in so far as possible to Ireland's Europe 2020 targets as set out in the National Reform Programme. This objective is to ensure that what is being measured will be of most use in EU reporting requirements.

The indicators used in the Index (which have been informed by the GDI 2009) predate some Europe 2020 targets and more recent EU policy development. Future phases of the GHDI 2012 should consider synchronisation with the above projects and, where there are common indicators, that these can be harmonised to the greatest possible extent

# 4.0 Summary of Gateway Findings

The need for a better balance of social, economic and physical development across Ireland, supported by more effective planning, resulted in the identification of a series of Gateways (and Hubs) within the National Spatial Strategy (NSS) 2002-2020. In order to drive development in the regions, areas of sufficient scale and critical mass will be built up through this network of Gateways (and Hubs).

Nationally, Gateways are expected to act as strategically placed engines of growth to enable their functional regions and by extension the country, to grow to its potential, within a national spatial and forward planning framework. With a strategic location both nationally and relative to their surrounding environs, Gateways act as the main providers of the area's social and economic infrastructure and support services. At a regional level, Gateways are positioned to guide more balanced regional development therefore ensuring their continued development and should inform capital investment priority decisions. They should facilitate their functional areas to harness their potential and provide a framework for coordinating local planning (for example, alignment of population targets with Gateways objectives, etc), while also strengthening the relationship between urban and rural areas, and promoting sustainable forms of development. The Gateways have been the main drivers of the regional economy and, in the case of Dublin the national economy, albeit to different extents. The Hubs on the other hand fall into three distinct categorises: (i) towns which are expected to complement and support nearby strong Gateways, e.g. Mallow to Cork and Tuam to Galway, (ii) linked Hubs comprising two strong county towns, which are required to work together for the benefit of the local functional area e.g. Ballina-Castlebar and Tralee-Killarney; and (iii) individual Hubs which act as key economic drivers in the local area e.g. Cavan, Ennis, Kilkenny, Monaghan, and Wexford.

As can be seen throughout the following summaries, analysis of the population growth, and the areas within which it has primarily taken place since 2002 is presented. In the case of most of the Gateways, the populations of the adjoining hinterlands grew at a far faster pace than that of the urban cores of the Gateways; in many cases the differential growth in **Zone 2** was over double that of **Zone 1**, and has resulted in an average for all Gateways of more than 2 to 1. Therefore, for every one percentage point of growth which was experienced by the urban core of the average Gateway, the surrounding hinterland grew by two percent. With this in mind, it is clear to see that future population growth must be concentrated within the urban cores of the Gateways and Hubs. It is reassuring to note that none of the **Zone 1**/urban cores of any Gateway experienced population decline, but in some cases the level of growth remained negligible.

Many of the other issues which have come to light during the course of the GHDI 2012 study can be seen to be associated with the location of population growth in inappropriate locations. The prioritisation of investment programmes which will facilitate population growth within the urban cores of each of the Gateways and Hubs should be seen as an important step forward in the development of Ireland's Gateways.

This section briefly explores the performance of the Gateways in Ireland. Please refer to the individual Gateway reports, prepared as part of the GHDI 2012 study, for more detailed analysis.

**Please note that, in order to facilitate comparison between the GHDI 2012 and the GDI 2009, the 2009 Index has been remapped across the 2011 Census boundaries to produce a comparative Index. Therefore, the GHDI 2012 generates two Index scores for each Gateway: a 2009 Index score and a 2012 Index score.**

**Gateways are presented in the following order:**

**Border, Midland and Western (BMW) Region**

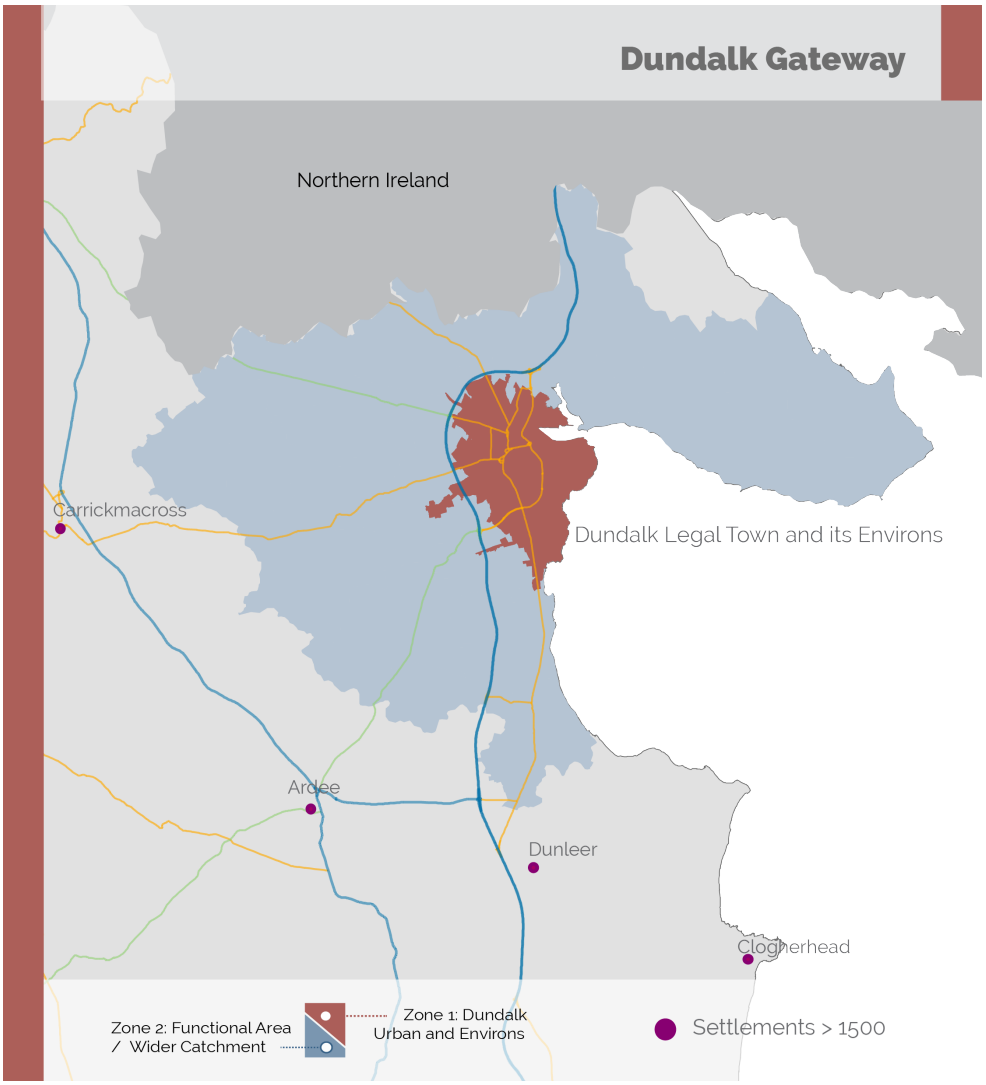
- Dundalk;
- Galway;
- Letterkenny;
- Midland; and
- Sligo.

**Southern and Eastern (S&E) Region**

- Cork;
- Dublin;
- Limerick-Shannon; and
- Waterford.

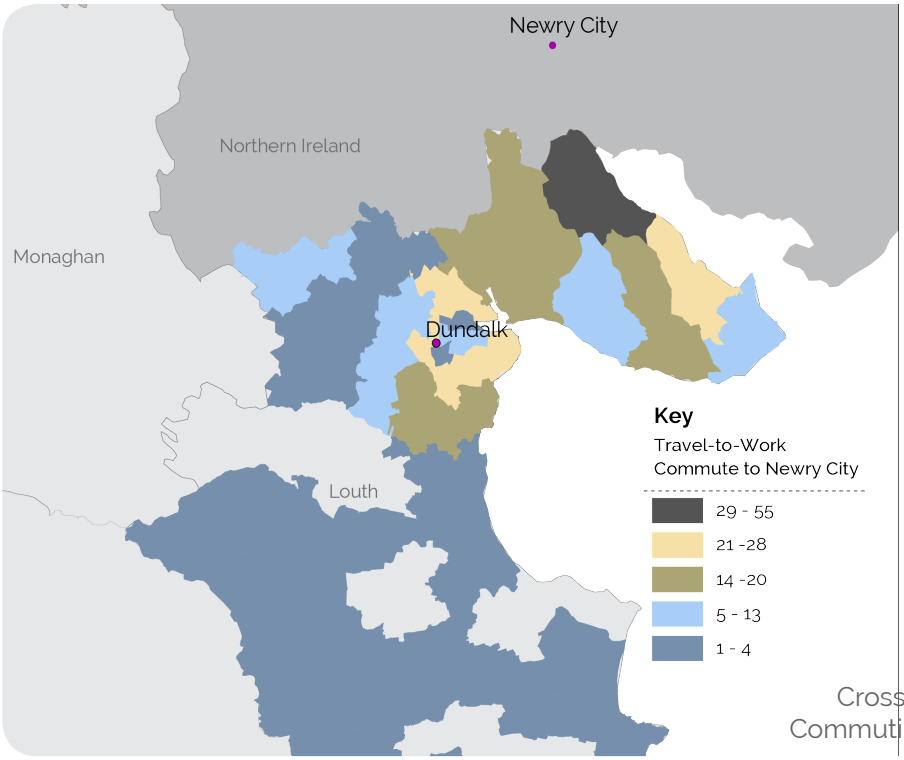
## 4.1 Dundalk Gateway[39]

The Dundalk Gateway **Zone 1** area (urban core) and **Zone 2** area (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to the urban core, i.e. **Zone 1**, for work) are shown in the map below.




» The functional area of the Dundalk Gateway can be seen to have contracted slightly between 2009 and 2012;
» **Zone 2** can be seen to encompass a large proportion of north Louth and small elements of east Monaghan, but it no longer includes all of Cooley Peninsula as it had in 2009.

39 It should be noted that the results provided below represent statistics derived from the Dundalk Gateway only, and do not include any statistical data from Newry City or other parts of Northern Ireland.



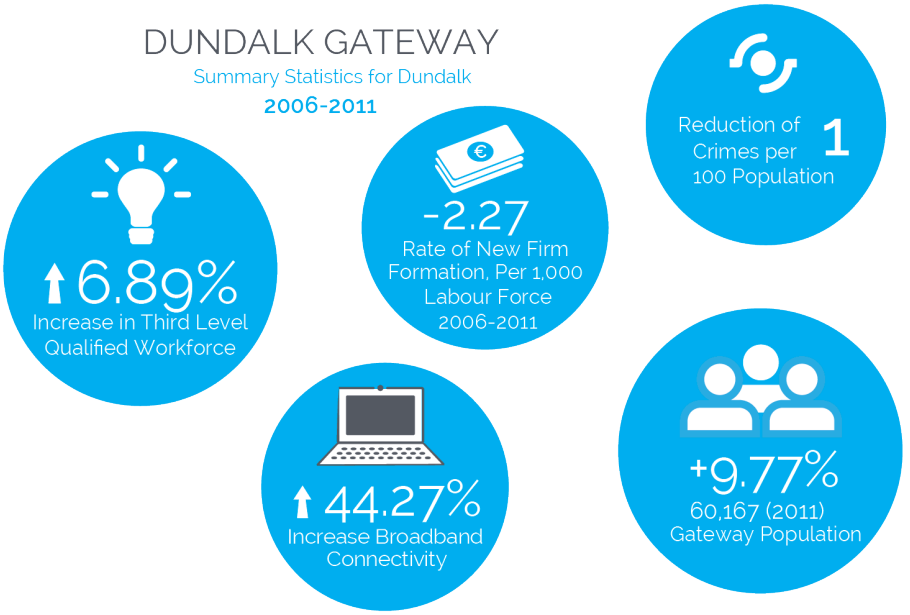

Cross-Border Commuting, 2011

**Dundalk: Cross-border context**

The Northern Ireland Census was released in 2013, and therefore was not available for full review during the preparation of the Gateways and Hubs Development Index 2012. However, in order to examine the cross-border context and the economic linkages which exist, a brief analysis of the cross-border relationship between the Dundalk Gateway and Newry City, from a work-based commuting perspective, has been undertaken, and this is illustrated within the map above.

Although cross-border commuting is common place throughout much of the length of the border, the areas (EDs) which demonstrated the strongest links across the border within the functional area of the Dundalk Gateway were those of Drummullagh and Ravensdale, where 18% and 6% of the respective workforces commute to Newry for the purposes of work.

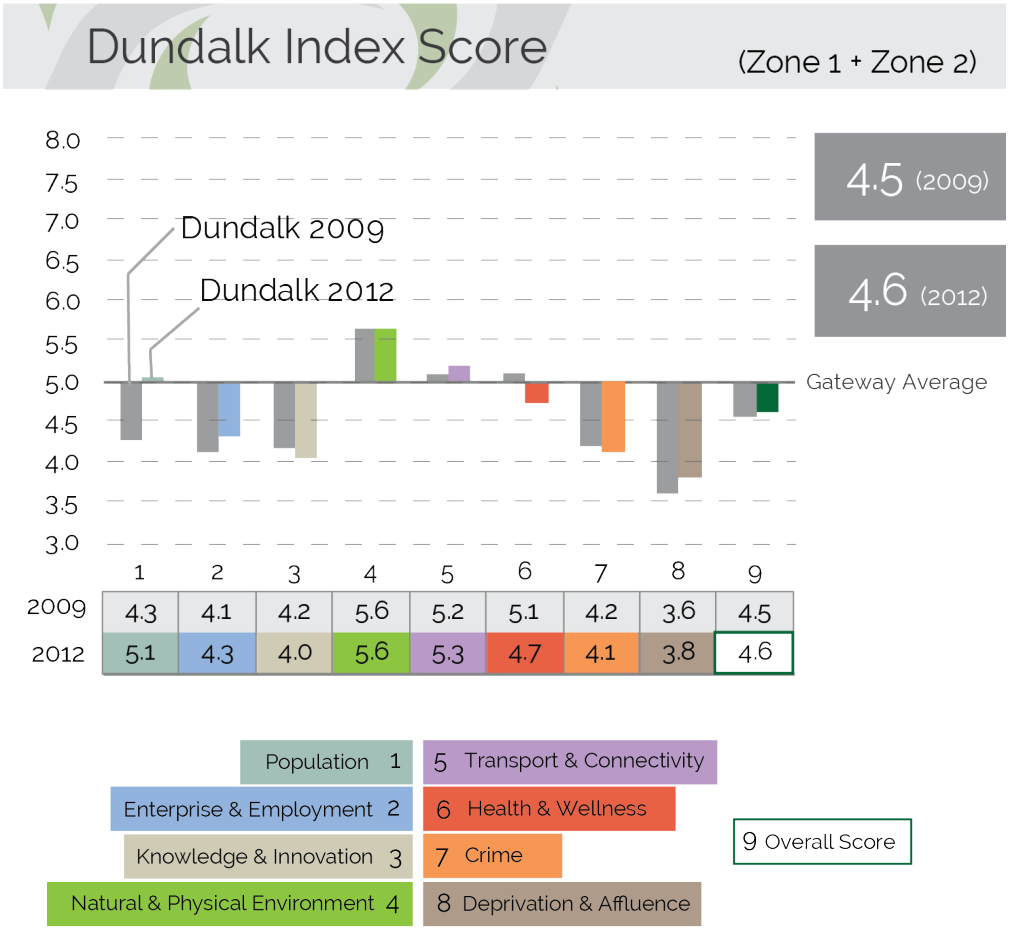
### 4.1.1 Dundalk Gateway: Headline Findings from GHDI 2012



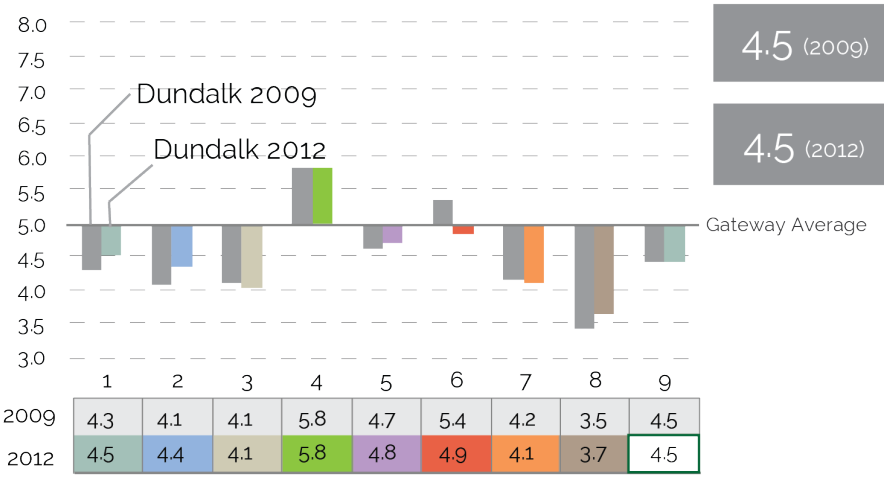

- The Dundalk Gateway recorded a higher than average population increase (Census 2011) of 9.77% between 2006 and 2011, since 2002 there has been growth of 17.49%.
- The Gateway has slightly higher than average dependency ratios, the average figure for all Gateways in 2011 was 49.53% while the Dundalk Gateway was 51.72%.
- The rate of new firm formation in the Dundalk Gateway is on the national Gateway average.
- Unemployment statistics derived from the Census 2011 shows that unemployment had increased to 24.19%, representing a 14.37% increase on the 2006 figure. By comparison, the average unemployment figure for all Gateways in 2011 stood at 19.94%.
- The percentage of the labour force living within the Dundalk Gateway (Zones 1 and 2) who hold a third level qualification has demonstrated overall growth of 6.89% between 2006-2011 and currently stands at 25.97%.
- Research and development funding generated by Dundalk Institute of Technology has varied over the time considered. In 2006 research and development funding per admission was €888, this rose to €2,698 in 2008 and has subsequently declined to €861 in 2010. The average figure for all Gateways in 2010 is €2,405.
- The Dundalk Gateway is performing well in the Natural and Physical Environment Domain. The results for both river water quality and consumable water infrastructure are positive, particularly in comparison with those of many of the other Gateways. Similarly, Dundalk has also performed well in terms of the high proportion of waste which it recovers.
- The overall percentage of people within the Dundalk Gateway (Zones 1 and 2) who use sustainable transportation modes, such as walking, cycling or public transport to get to and from work has declined from 20.94% in 2002 to 19.01% in 2006, and had fallen to 16.70% by 2011. However this figures remains ahead of the Gateway average of 14.98%.

» Although remaining above the average for all Gateways, the amount of people who live less than 30 minutes from their place of work has demonstrated a minor decrease between 2002-2011.
» The number of retail units per 100 households is slightly higher than the Gateway average.
» The IT connectivity (household broadband take-up) indicator results for Dundalk reveal that despite significant increases (a result which is also reinforced in perception survey results), the Gateway has produced the fourth lowest result of any of the Gateways, and is below the Gateway average for household broadband take-up.
» In terms of mortality, Dundalk has a lower than average year of potential life lost (YPLL), indicating a lower premature mortality rate within the Gateway. Still well within a healthy weight range, the average birth weight of babies was slightly lower than the Gateway average. Access to primary health care (GP's) is below the national Gateway average.
» Detailed analysis of the crime figures produced for the Dundalk Gateway indicates that there have been declines in some types of offences, but this figure is slightly above the Gateway average with 6.33 crimes per 100 of the population compared to 5.32 across all Gateways.
» Dundalk has produced a high deprivation rating for both Zones 1 and 2 and represents the highest deprivation rate across the nine Gateways.

### 4.1.2 GHDI 2012 Score for Dundalk Gateway



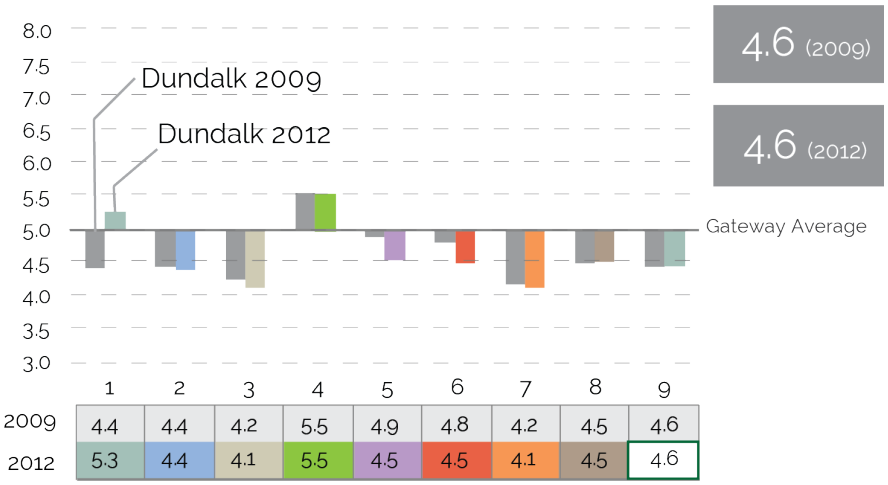
# Dundalk Zone 1 Index Score




| | |
|---|---|
| Population 1 | 5 Transport & Connectivity |
| Enterprise & Employment 2 | 6 Health & Wellness |
| Knowledge & Innovation 3 | 7 Crime |
| Natural & Physical Environment 4 | 8 Deprivation & Affluence |

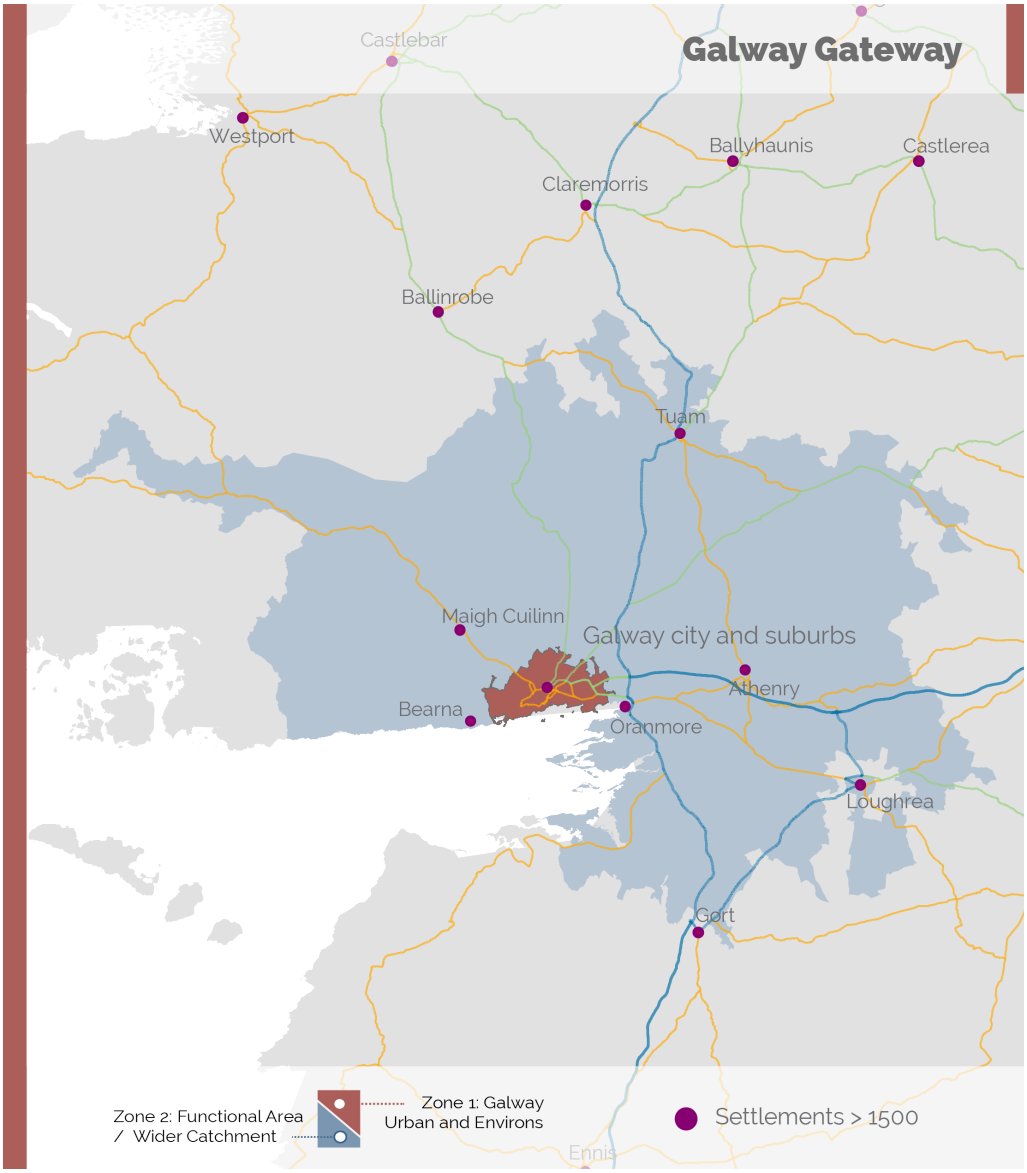
9 Overall Score

# Dundalk Zone 2 Index Score



## 4.2 Galway Gateway

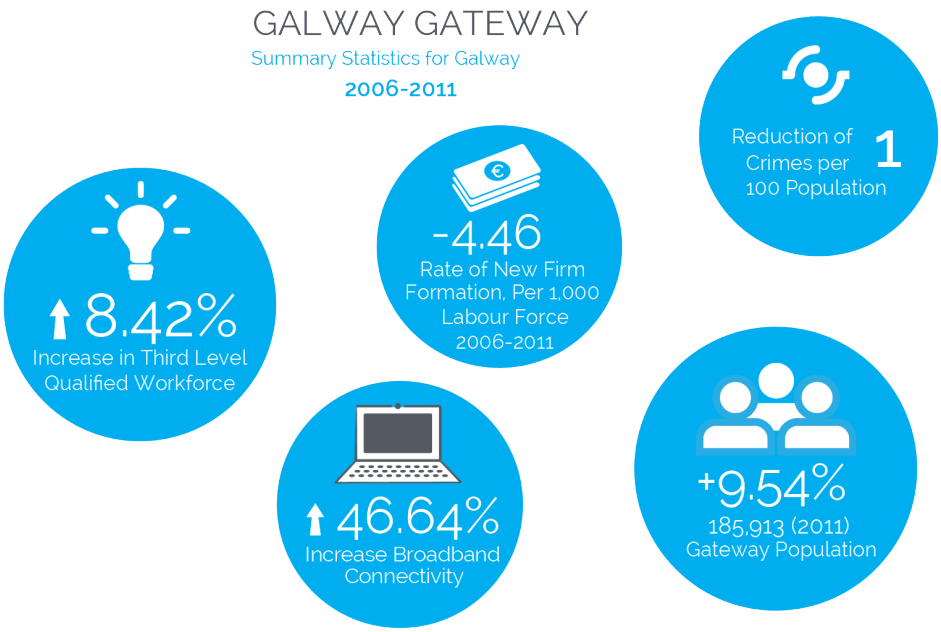
The Galway Gateway **Zone 1** area (urban core) and **Zone 2** area (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to the urban core, i.e. **Zone 1**, for work) are shown in the map below.




» The extent of the functional area of the Galway Gateway in 2012 remains largely unchanged to that identified in 2009;

» **Zone 2** can be seen to encompass a large proportion of Galway county, stretching from Loughrea, in East Galway, well into Connemara, in the West of the county, and from Gort in the South to Tuam and beyond in the North of the county.

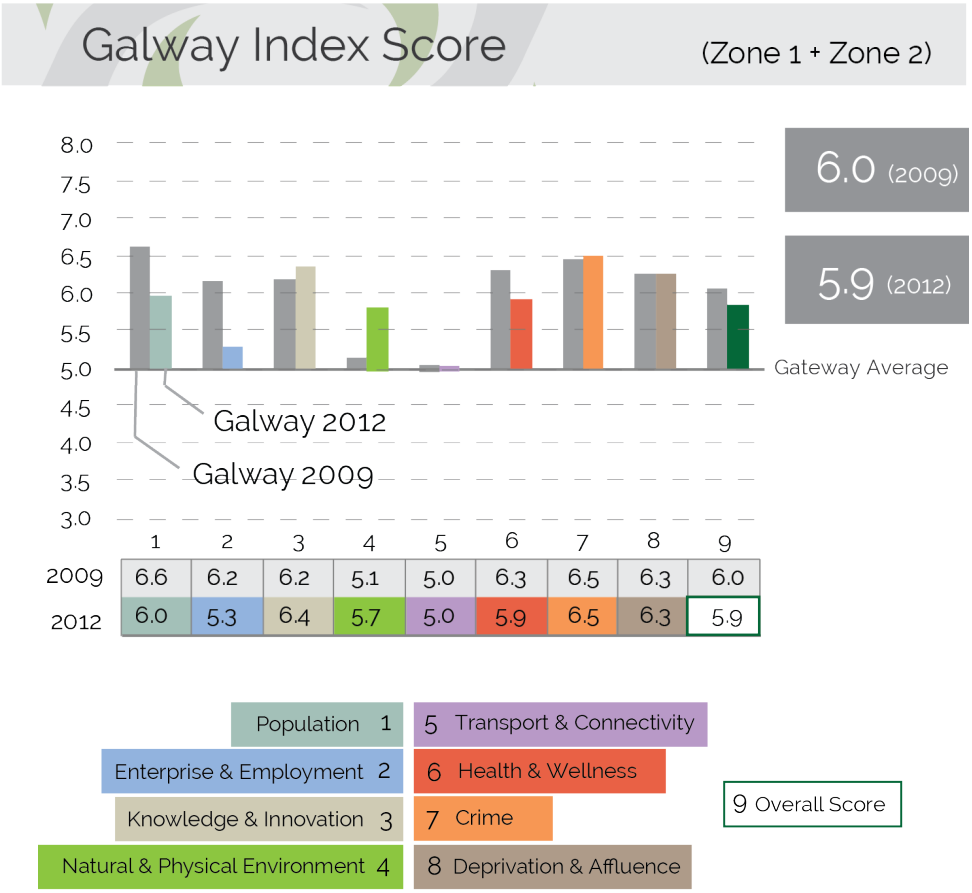
### 4.2.1 Galway Gateway: Headline Findings from GHDI 2012



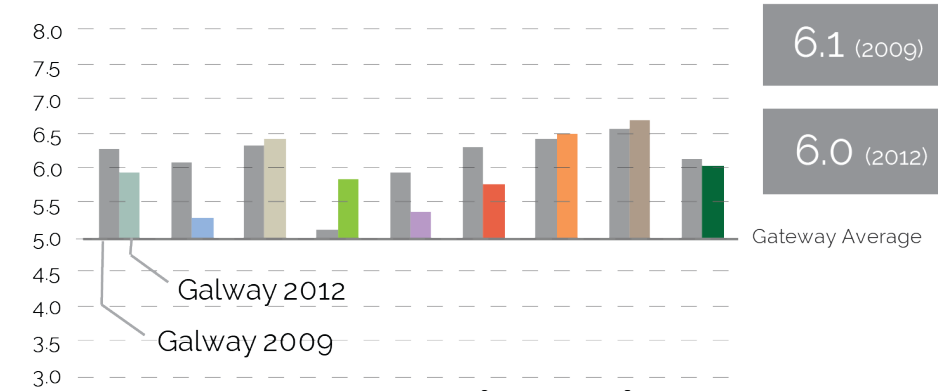

- The Galway Gateway population figure (Census, 2011) has increased by 9.54% on the 2006 figures and by 24.82% compared to 2002. The rate of population growth is above the Gateway average of 8.44%.
- Galway has a lower dependency rate compared to other Gateways (45.46% v 49.54%) and is indicative of a higher proportion of people from the core working age cohorts living within the Galway Gateway.
- The Galway Gateway's performance in terms of new firm formations (7.53 new firms per 1,000 employees) is above the national Gateway average (7.29 new firms per 1,000 employees).
- The Galway Gateway returned an unemployment rate of 17.02% (based on Census 2011 figures), which compares favourably with the unemployment figure for all Gateways, at 19.94%.
- The percentage of the labour force of the Galway Gateway (Zones 1 and 2) who hold a third level qualification has demonstrated overall growth of 8.42%, from 29.87 % in 2006 to 38.29% in 2011. This is well above the Gateway average of 31.07%.
- Third level research and development funding in the Galway Gateway (€4,641 per enrolled student) is well ahead of the Gateway average (€2,405 per enrolled student) in 2010.
- The Galway Gateway's results in the Natural and Physical Environment domain, indicates that the city is performing well, with the benefits of infrastructural improvements being clear in the consumable water infrastructure indicator.
- The use of sustainable transportation modes has fallen to 14.51% in the Galway Gateway, which is close to the Gateway average of 14.98%,
- The Gateway has been reasonably successful in delivering more retail outlets per 100 households situated in the urban core (**Zone 1**), than in **Zone 2**.
- Galway performed well in the Health and Wellness domain with better than average scores for all indicators.

» Crime figures for 2011 reveal a small reduction in crimes per 100 of the population on 2006 levels and a lower than Gateway average crime rate.
» There has been an overall improvement in the level of affluence which is experienced by residents of the Galway Gateway since 2006.

### 4.2.2 GHDI 2012 Score for Galway Gateway



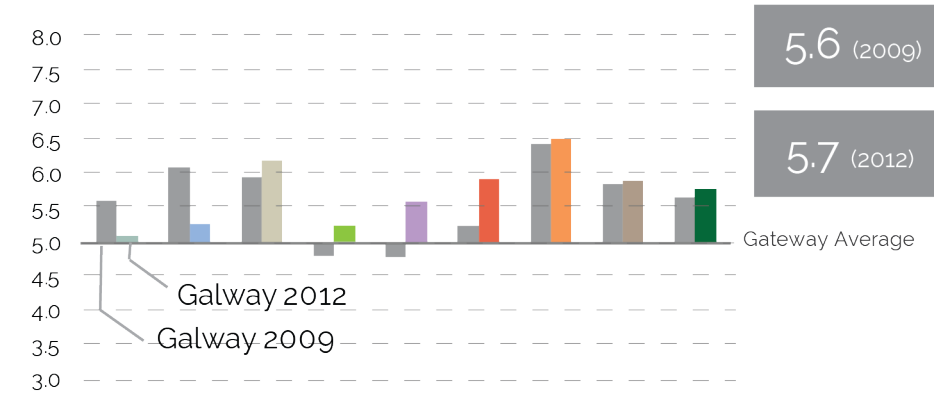
# Galway Zone 1 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 6.3 | 6.1 | 6.4 | 5.1 | 5.9 | 6.3 | 6.5 | 6.6 | 6.1 |
| 2012 | 6.0 | 5.3 | 6.5 | 5.8 | 5.4 | 5.8 | 6.5 | 6.7 | 6.0 |

Population 1
Enterprise & Employment 2
Knowledge & Innovation 3
Natural & Physical Environment 4
5 Transport & Connectivity
6 Health & Wellness
7 Crime
8 Deprivation & Affluence
9 Overall Score

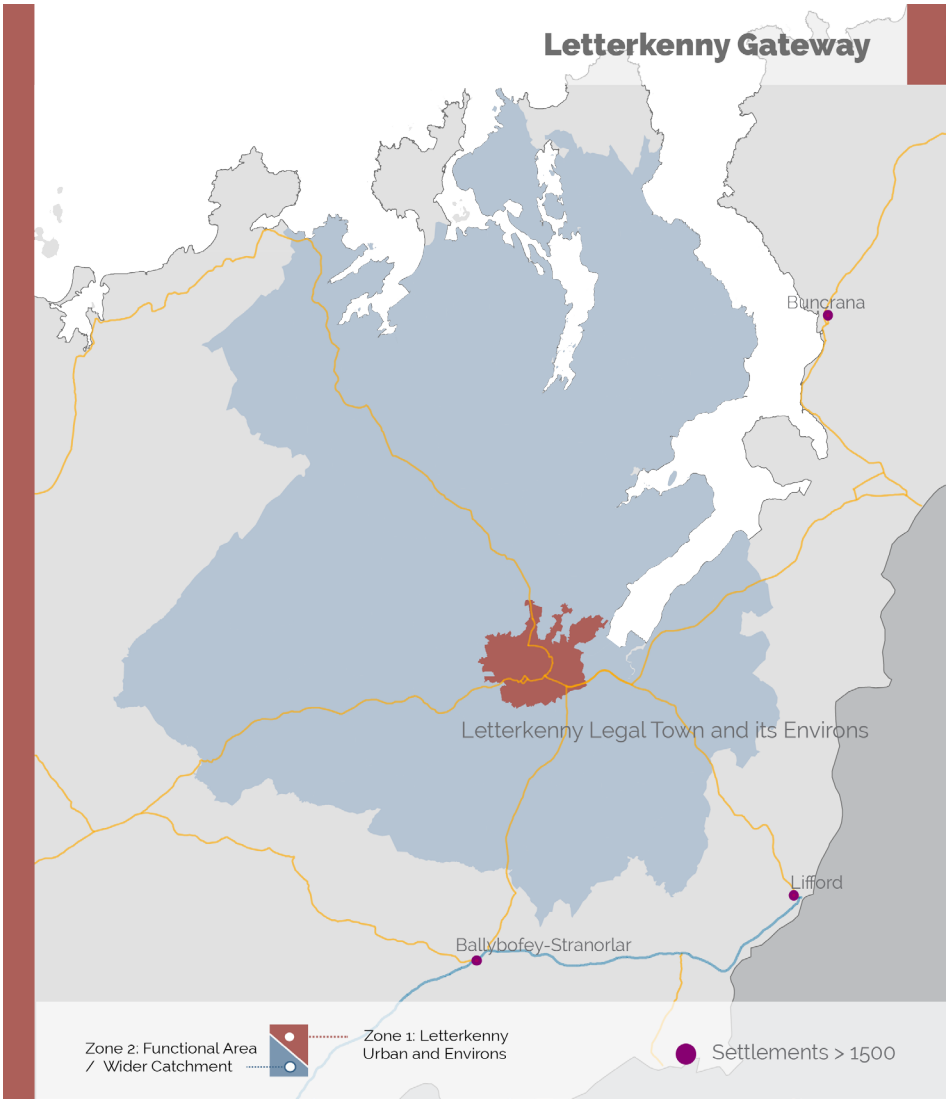
# Galway Zone 2 Index Score



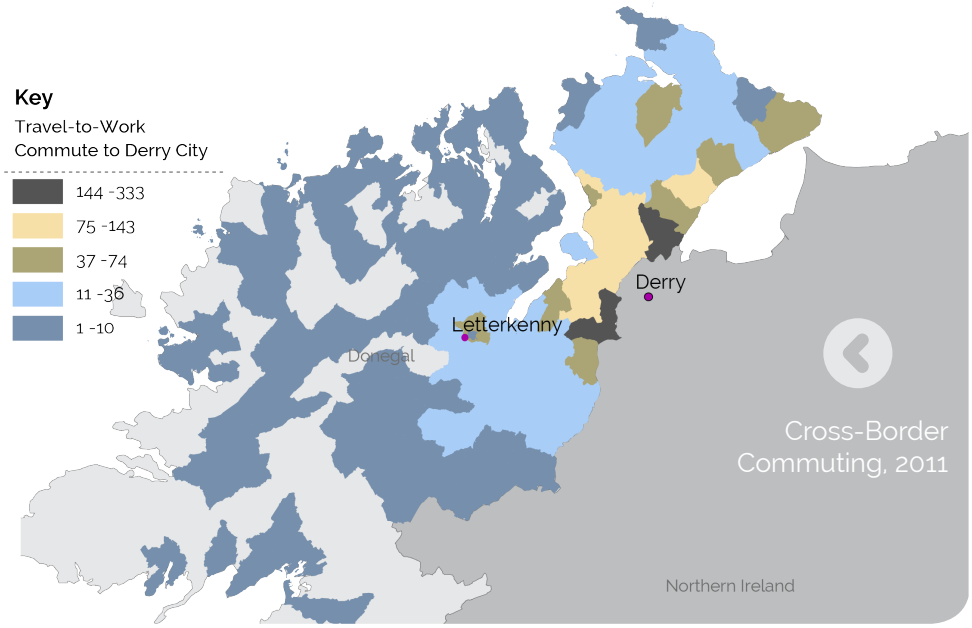

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 5.6 | 6.1 | 6.0 | 4.7 | 4.7 | 5.3 | 6.5 | 5.9 | 5.6 |
| 2012 | 5.1 | 5.3 | 6.2 | 5.3 | 5.5 | 5.9 | 6.5 | 5.9 | 5.7 |

## 4.3 Letterkenny Gateway

The Letterkenny Gateway **Zone 1** area (urban core) and **Zone 2** area (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to the urban core, i.e. **Zone 1**, for work) are shown in the map below.




» The functional area of the Letterkenny Gateway can be seen to have contracted between 2009 and 2012;
» The western part of Zone 2 is largely unchanged from that which was evident in the original GDI study, but it no longer stretches north east into the Inishowen Peninsula and towards the border near Derry as it did in 2009.

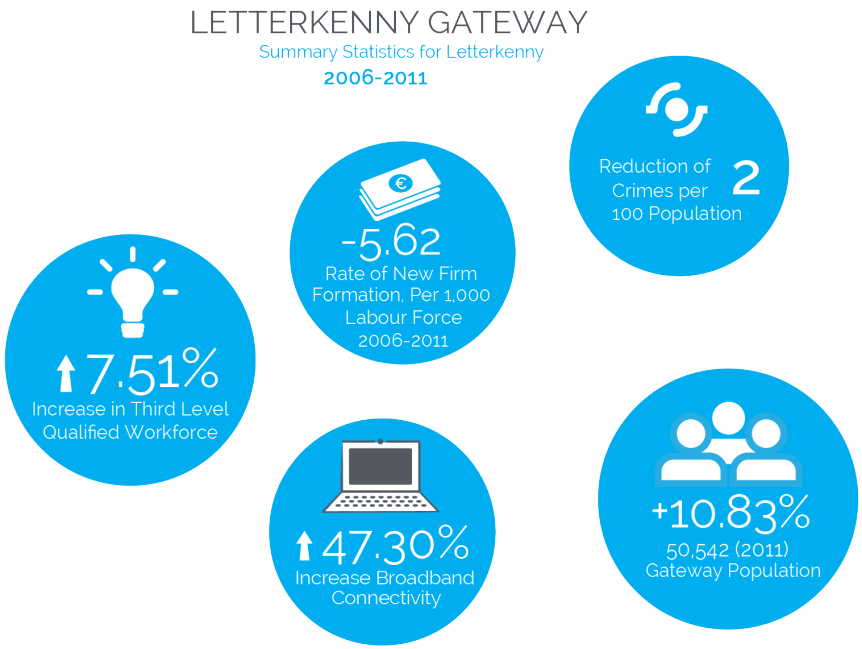



**Letterkenny: Cross-border context**

The Northern Ireland Census was released in 2013, and therefore was not available for full review during the preparation of the Gateways and Hubs Development Index 2012. Accordingly, Letterkenny is assessed on an individual basis. However, a brief analysis of the cross-border relationship, from a work-based commuting perspective was also undertaken. Letterkenny forms a cross-border 'linked Gateway' with Derry, with the proximity of the two centres being identified as offering significant potential for collaboration and to establish critical mass in a polycentric fashion.

The map above indicates the strength of this relationship with respect to the share of the workforce in County Donegal that commuted to Derry City (in 2011). Although cross-border commuting is common place throughout much of east Donegal, the areas (EDs) which demonstrated the strongest links with Derry were those closest to the border, including Kilderry and Killea. In both of these examples, in excess of 48% of the workforce commutes to Derry for the purposes of work. In this context, it is clear to see that Derry does have a significant economic impact upon Letterkenny and its surrounding hinterland within east Donegal, reinforcing the linked Gateway status of the two adjacent settlements.

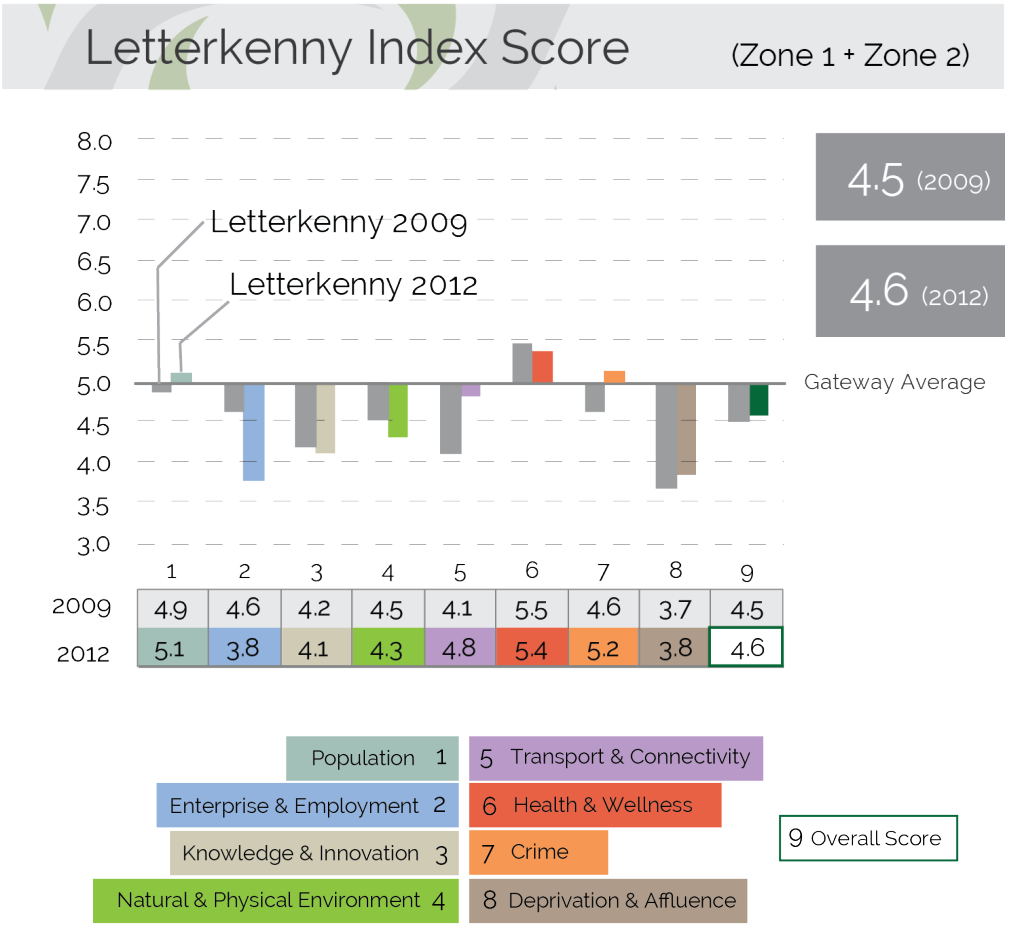
### 4.3.1 Letterkenny Gateway: Headline Findings from GHDI 2012



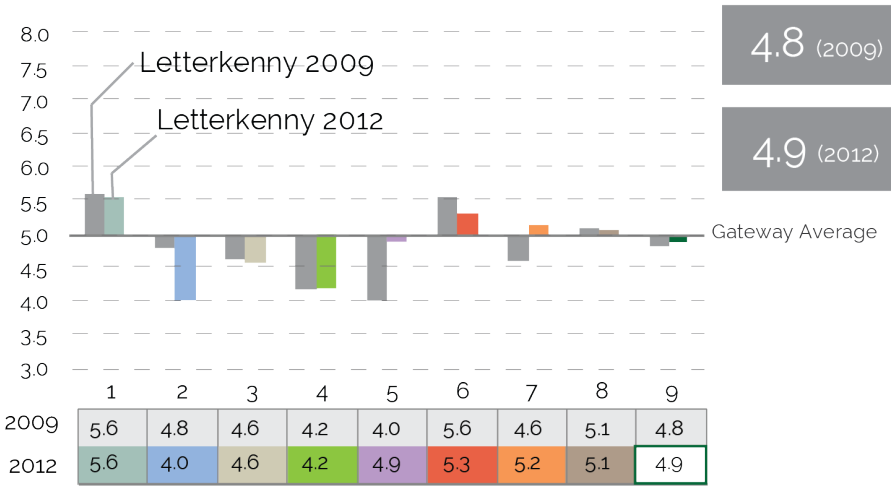

- The Letterkenny Gateway population has grown by 10.83% between 2006 and 2011, which is ahead of the Gateway average of 8.44%.
- The Gateway has slightly higher than average dependency ratios, the average figure for all Gateways in 2011 was 49.53% while the Letterkenny dependency ratio was 53.29%.
- The Gateway has a considerably lower new firm formation rate than the national Gateway average.
- The overall Gateway returned an unemployment rate (based on the 2011 Census) of 24.31% in 2011. By comparison, the average unemployment figure for all Gateways in 2011 stood at 19.94%.
- The percentage of the labour force living within the Letterkenny Gateway (Zones 1 and 2) who hold a third level qualification has demonstrated overall growth of 7.51%, from 21.04% in 2006 to 28.55% in 2011, although remains below the national Gateway average of 31.07%.
- While both the levels of waste recovery and the consumable water infrastructure figures have both shown positive signs overall the Letterkenny Gateway is below the average in terms of performance on Natural and Physical Environment domains.
- The numbers accessing broadband in the Letterkenny Gateway has increased by 47.30% percent to 58.29%.
- Retail activity (the number of retail outlets per 100 households) in Letterkenny (2.79) is above the national average for Gateways. This is apparent in particular in relation to **Zone 1** with a figure of 6.38 retail outlets per 100 households.
- The Letterkenny Gateway has performed reasonably well in the health and wellness domain. The Gateway has a good record of Years of Potential Lost Life (YPLL), indicating that Letterkenny has a higher life expectancy than the Gateway average. In 2011, YPLL for Letterkenny was 54.34 years lost per 1,000 of the population compared to a national average of 63.86 years.

» The Gateway benefits from a slightly lower crime rate per 100 of the population than the national Gateway average and lower levels of crime than that which occurred in 2006.
» Despite some improvement since 2006, Letterkenny still has one of the highest deprivation rates of all the Gateways (only the Dundalk Gateway is more deprived).

### 4.3.2 GHDI 2012 Score for Letterkenny Gateway



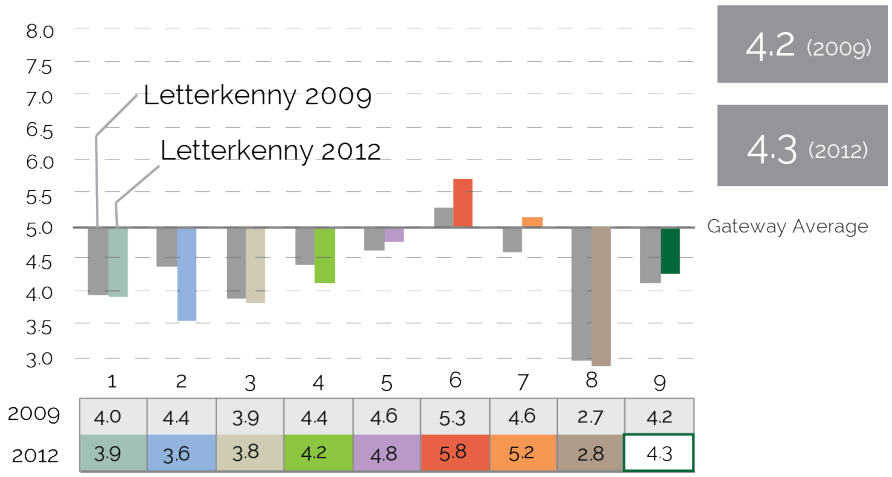
# Letterkenny Zone 1 Index Score




| | |
|---|---|
| Population 1 | 5 Transport & Connectivity |
| Enterprise & Employment 2 | 6 Health & Wellness |
| Knowledge & Innovation 3 | 7 Crime |
| Natural & Physical Environment 4 | 8 Deprivation & Affluence |

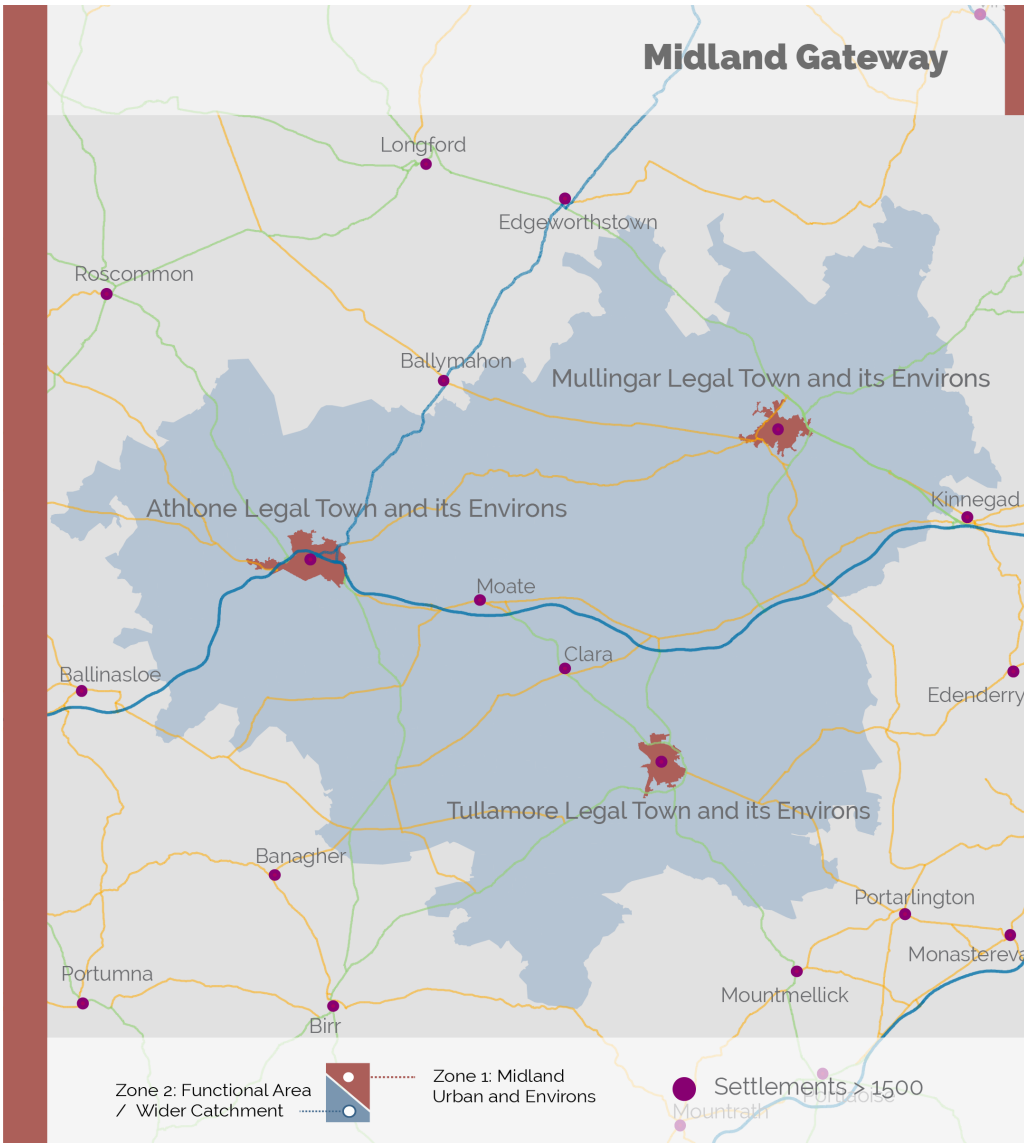
9 Overall Score

# Letterkenny Zone 2 Index Score



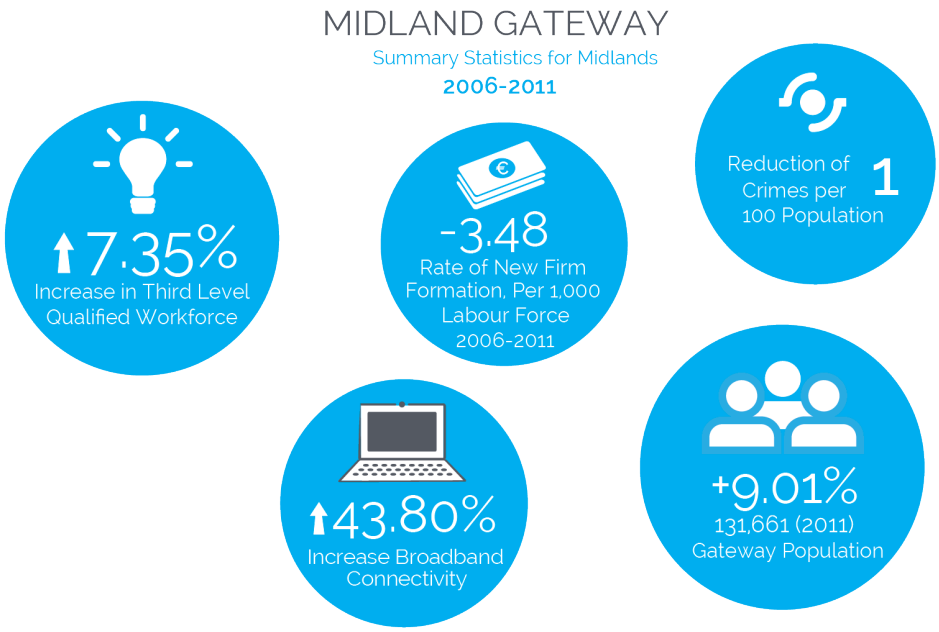
## 4.4 Midland Gateway

The Midland Gateway **Zone 1** area (urban core) and **Zone 2** area (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to the urban core, i.e. **Zone 1**, for work) are shown in the map below.




» The functional area of the Midland Gateway in 2012 has increased over that identified in 2009;
» The influence of Zone 2 encompasses the internal area between the three towns creating a large functional area where in excess of 20% of the working population is commuting to one of the three towns.

### 4.4.1 Midland Gateway: Headline Findings from GHDI 2012

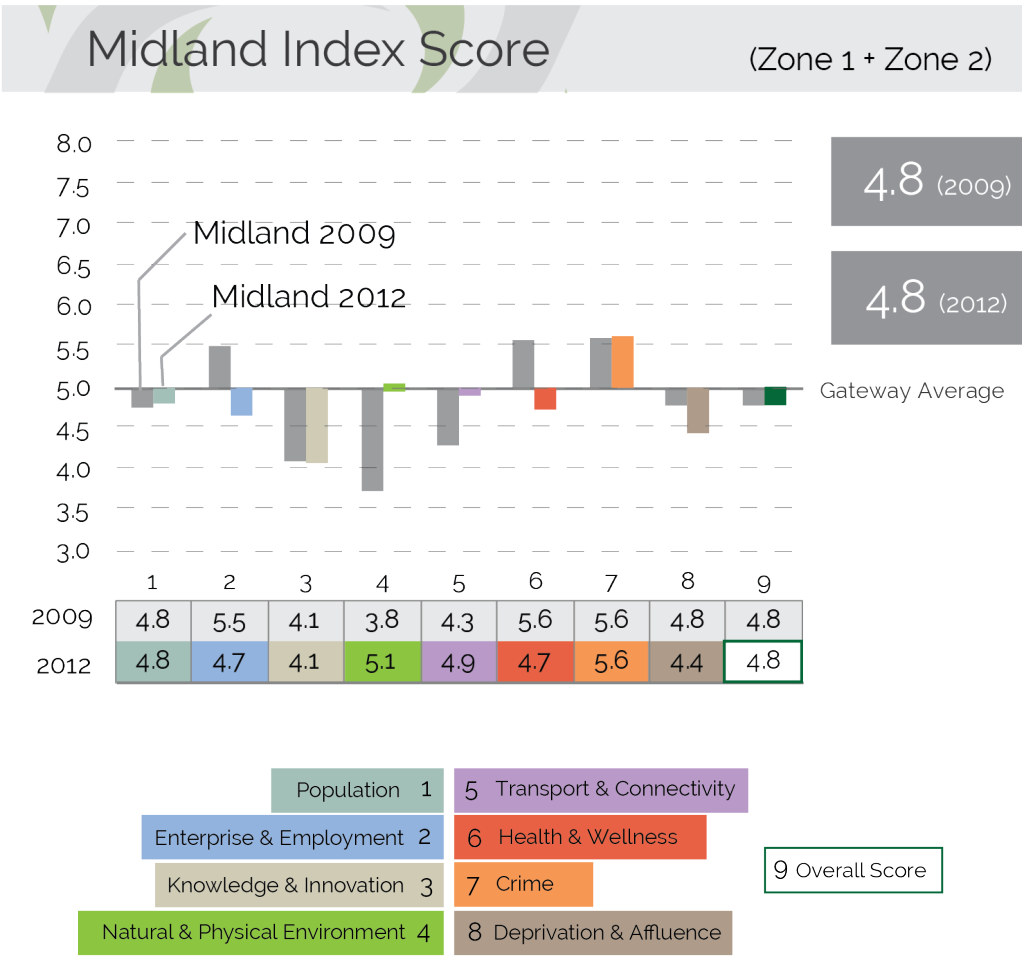



- The Midland Gateway population has grown by 9.01% between 2006 and 2011, which is ahead of the Gateway average of 8.44%.
- The Gateway has slightly higher than average dependency ratios, the average figure for all Gateways in 2011 was 49.53% while the Midland was 51.82%.
- The Midland Gateway returned a slightly-below-average rate of new firm formation.
- Unemployment within the Gateway has increased to 20.70% (based on Census 2011 figures), representing a 14.16% increase on the 2006 rate of unemployment. By comparison, the average unemployment figure for all Gateways in 2011 stood at 19.94%, so the Midland Gateway is returning a near on-average rate of unemployment.
- The percentage of the labour force living within the Midland Gateway (Zones 1 and 2) who hold a third level qualification has demonstrated overall growth of 7.35%, from 19.39% in 2006 to 26.74% in 2011.
- Third level research and development funding in the Athlone Gateway (€722 per enrolled student) is below the Gateway average (€2,405 per enrolled student) in 2010. This has however increased 63.05% since 2006.
- There have been mixed results within the Midland Gateway under the Natural and Physical Environment domain.
- The overall percentage of people within the Midland Gateway (Zones 1 and 2) who walk, cycle or use public transport to get to and from work had fallen slightly to 11.56% by 2011.
- Households within the Midland Gateway are relatively well served in terms of retail, with a higher than average retail outlet per 100 household rate for the Gateway.
- IT connectivity has grown by 43.80% across the gateway to 56.27%.
- The Gateway has a higher YPLL rate than average and there are also fewer GP's per 1,000 of the population in comparison with the average for all Gateways.

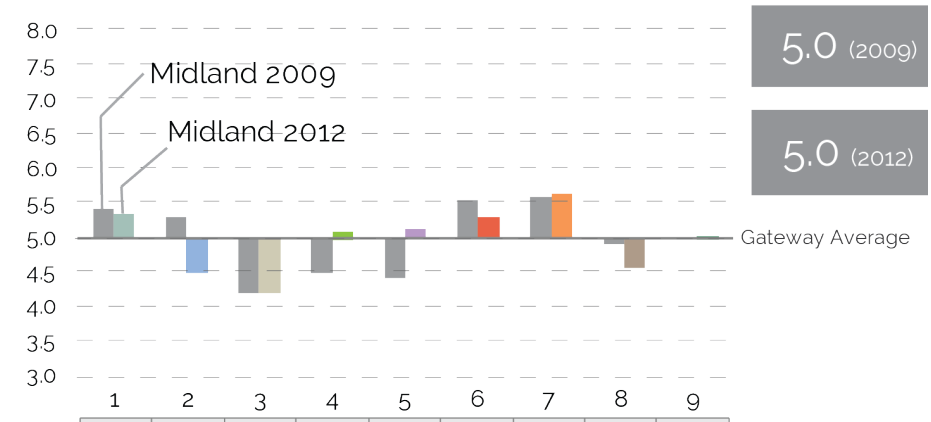
» The Midland Gateway has a lower crime rate than the Gateway average. Crime levels in the Midland Gateway dropped from 5.88 crimes per 100 of the population in 2006 to 4.58 in 2011.

» In comparison to the national Gateway average, the Midland Gateway is relatively deprived (the 6th most affluent of the nine Gateways), with negative ratings on the Affluence and Deprivation Index for both **Zone 1** and **Zone 2**.

### 4.4.2 GHDI 2012 Score for Midland Gateway



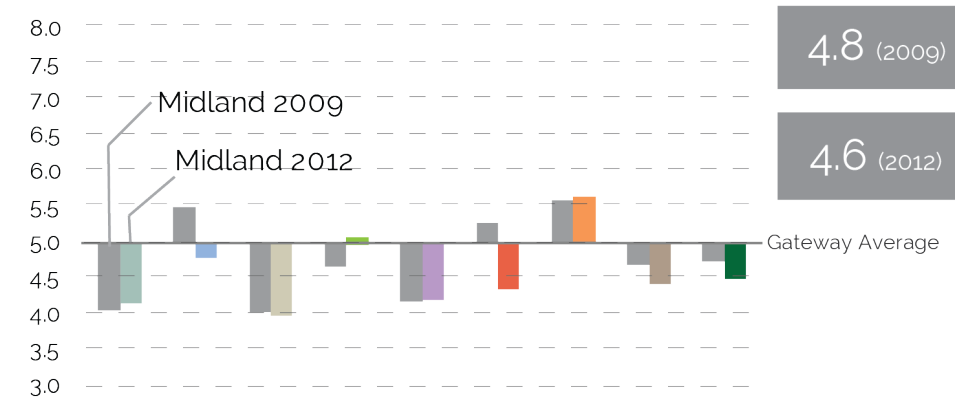
# Midland Zone 1 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 5.4 | 5.3 | 4.2 | 4.5 | 4.4 | 5.6 | 5.6 | 4.9 | 5.0 |
| 2012 | 5.4 | 4.5 | 4.2 | 5.0 | 5.1 | 5.3 | 5.6 | 4.6 | 5.0 |

Population 1
Enterprise & Employment 2
Knowledge & Innovation 3
Natural & Physical Environment 4
5 Transport & Connectivity
6 Health & Wellness
7 Crime
8 Deprivation & Affluence
9 Overall Score

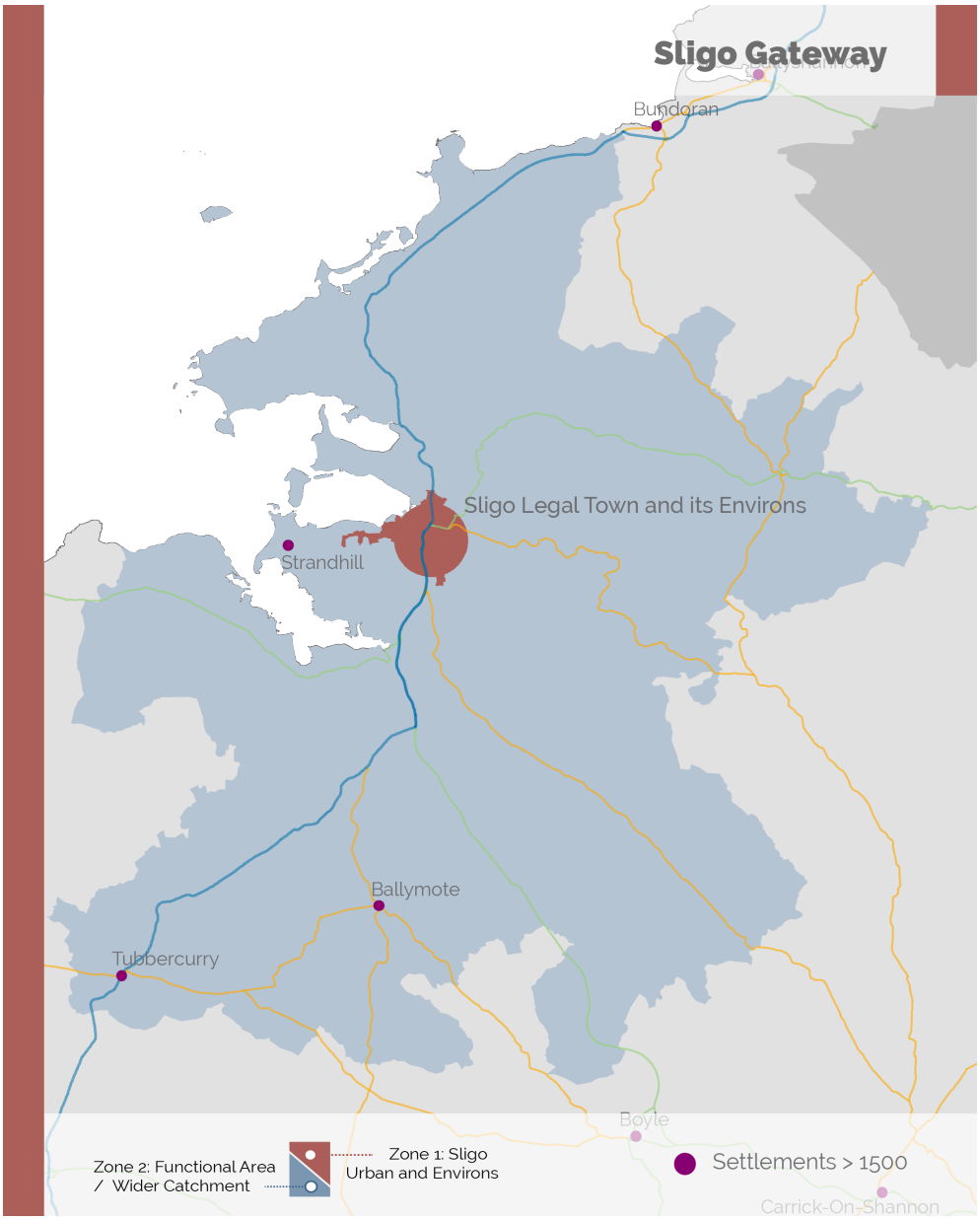
# Midland Zone 2 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 4.0 | 5.5 | 4.0 | 4.8 | 4.3 | 5.3 | 5.6 | 4.7 | 4.8 |
| 2012 | 4.2 | 4.8 | 4.0 | 5.0 | 4.2 | 4.4 | 5.6 | 4.4 | 4.6 |

## 4.5 Sligo Gateway

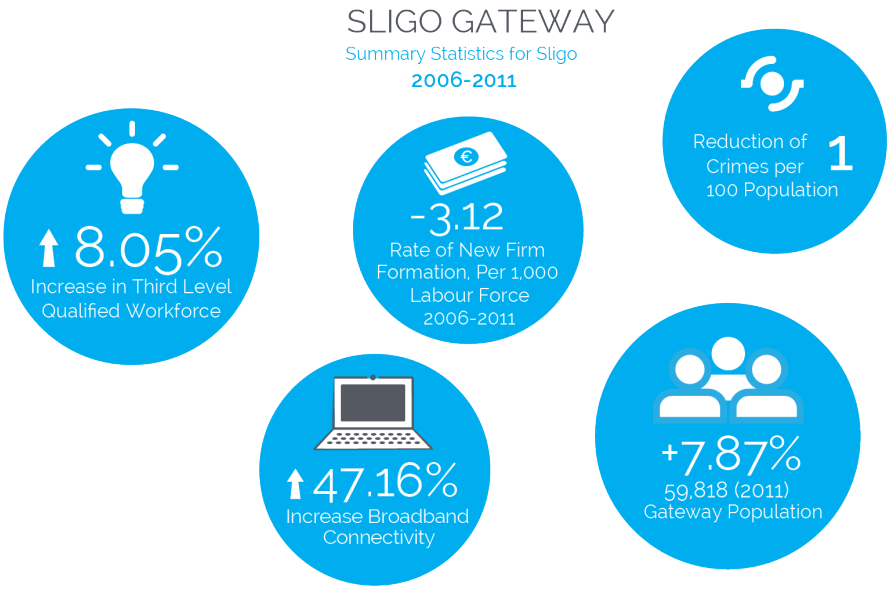
The Sligo Gateway **Zone 1** area (urban core) and **Zone 2** area (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to the urban core, i.e. **Zone 1**, for work) are shown in the map below.




» The Gateway has retained its influence over parts of north Leitrim and south Donegal.

» Within the functional area of the Sligo Gateway, there has been some level of change (reduction in the size) in the **Zone 2** boundary.

### 4.5.1 Sligo Gateway: Headline Findings from GHDI 2012




- The Sligo Gateway recorded a population increase (Census 2011) of 7.87% on that produced in 2006, and 13.95% from that produced in 2002. The rate of population change between 2002-2006 and 2006-2011 increased by 2.22%.
- 42.14% of the population living within the urban area (**Zone 1**) are classified as being dependent, compared with 55.47% in **Zone 2**. The Gateway average for dependency is 49.53% and the Sligo Gateway figure sits close to the average with a 50.87% dependency rate in 2011.
- The Sligo Gateway (5.79) is below the national Gateway average (7.29) in terms of the rate of new firm formations per 1,000 of the labour force.
- The Sligo Gateway experienced a lower than average unemployment rate of 17.63% in 2011. By comparison, the average unemployment rate for all Gateways for 2011 stood at 19.94%.
- The percentage of the labour force within the Sligo Gateway (Zones 1 and 2) who hold a third level qualification has demonstrated overall growth of 8.05%, from 22.58% in 2006 to 30.63% in 2011.
- The amount of research and development funding allocated to institutions, relative to the number of third level admissions within the Gateway, has also increased from €215 per admission (2006) to €326 per admission (2010).
- River water quality within the Gateway is of an acceptable standard according to the latest figures released by the EPA.
- The number of people who walk, cycle or use public transport to get to and from work within the Gateway as a whole has decreased since 2006. This is despite the fact that a large number of people live within 30 minutes of their place of work.
- Another measure of connectivity and accessibility is the number of retail outlets per 100 households, which for Sligo (2.59) is higher compared to the other Gateways average (2.37).

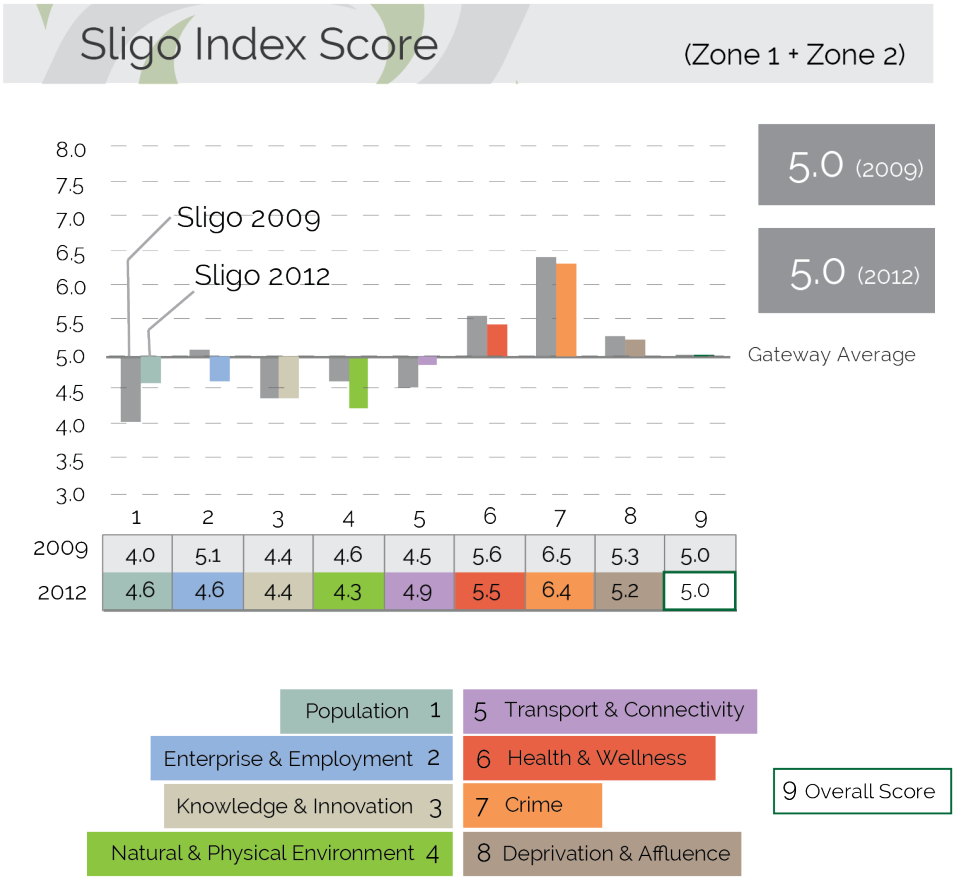
» As is the case throughout most Gateways, broadband coverage in both zones of the Gateway has substantially improved from a low base since 2006. It has increase by 47.16% from 12.58% in 2006 to 59.74% in 2011.

» For health and wellness, the Sligo Gateway returned slightly less than average results based on the indicator findings. The Sligo Gateway has quite a high YPLL (per 1000 population) level, and there was no perceptible improvement between 2006 and 2011. The number of GPs per 1,000 of population is on the national Gateway average. While the average birth weight in the Sligo Gateway has not changed between 2006-2011 and is marginally above the national Gateway average (but still the highest average birth weight of all the Gateways).

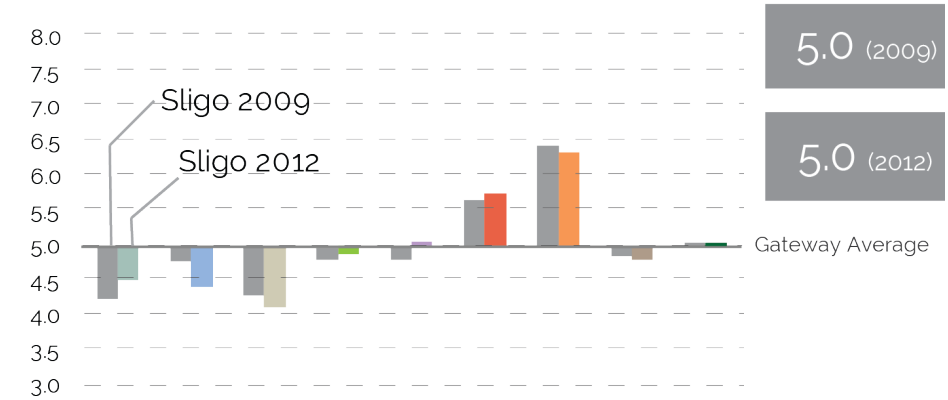
» Analysis of the crime figures for the Sligo Gateway illustrates a decrease in the overall crime rate between 2006 and 2011, which fell from 4.93 crimes per 100 of the population in 2006 to 3.77 crimes per 100 of the population in 2011. This represents a lower than the Gateway average (5.32) outcome.

» Analysis of the figures for **Zone 1** shows that the Gateway's urban core, although showing signs of improvement, experience a certain level of deprivation, a trend which has continued since at least 2006. **Zone 2** has maintained its general level of affluence, but has deteriorated slightly since 2006.

### 4.5.2 GHDI 2012 Score for Sligo Gateway



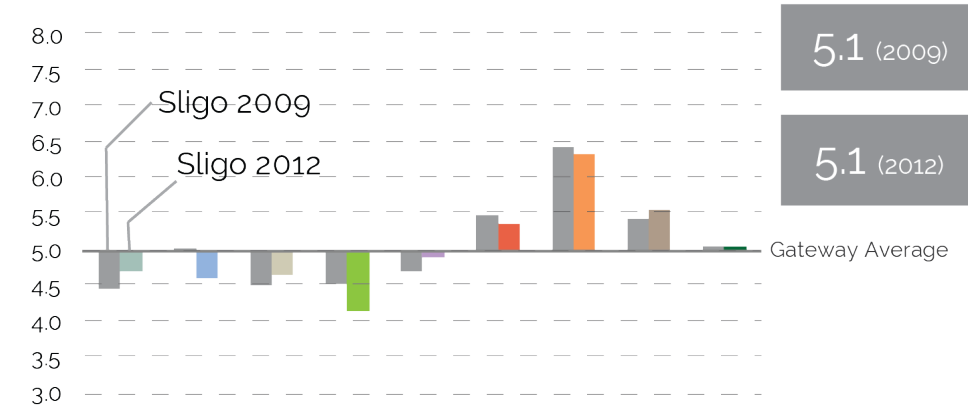
# Sligo Zone 1 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 4.2 | 4.8 | 4.3 | 4.8 | 4.8 | 5.7 | 6.5 | 4.9 | 5.0 |
| 2012 | 4.5 | 4.4 | 4.1 | 4.9 | 5.0 | 5.8 | 6.4 | 4.8 | 5.0 |

Population 1
Enterprise & Employment 2
Knowledge & Innovation 3
Natural & Physical Environment 4
5 Transport & Connectivity
6 Health & Wellness
7 Crime
8 Deprivation & Affluence
9 Overall Score

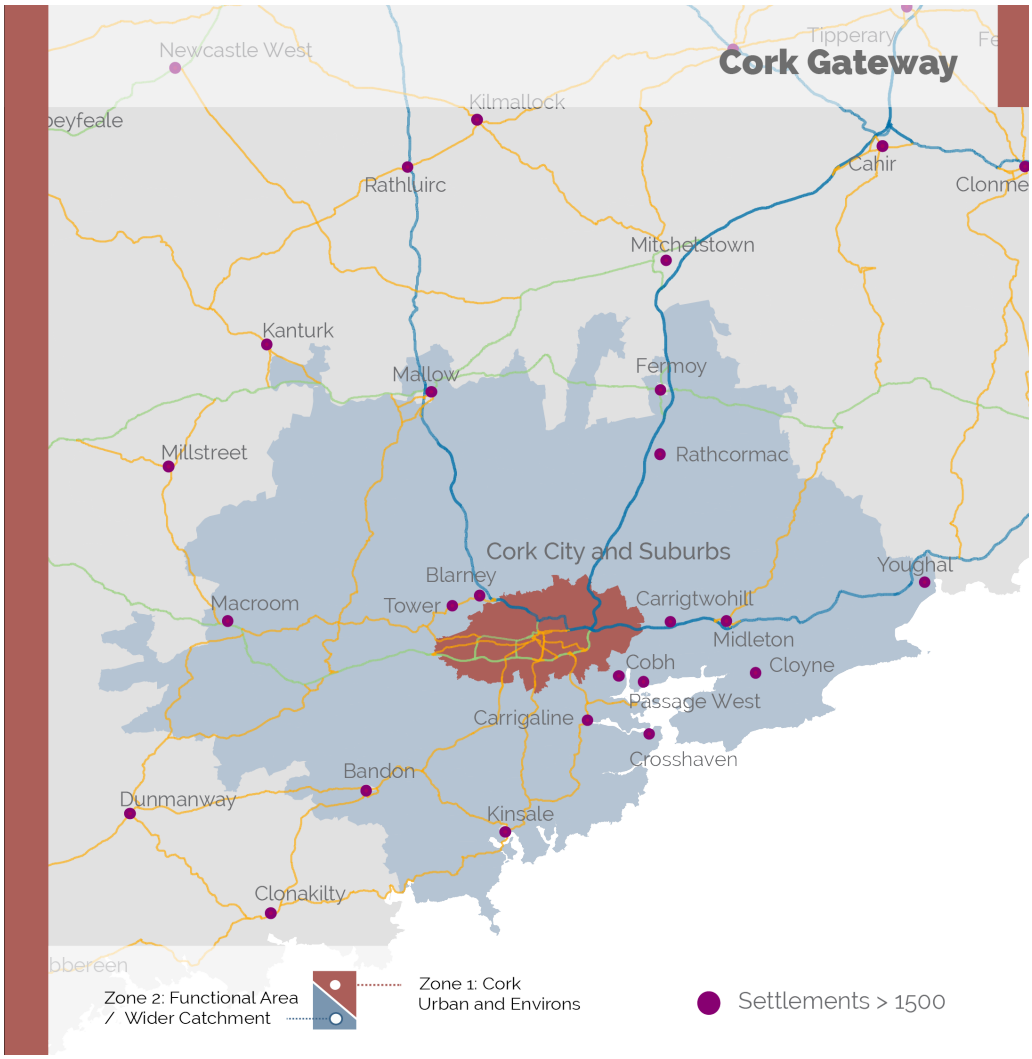
# Sligo Zone 2 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 4.5 | 5.0 | 4.5 | 4.5 | 4.7 | 5.5 | 6.5 | 5.5 | 5.1 |
| 2012 | 4.7 | 4.6 | 4.7 | 4.2 | 4.9 | 5.4 | 6.4 | 5.6 | 5.1 |

## 4.6 Cork Gateway

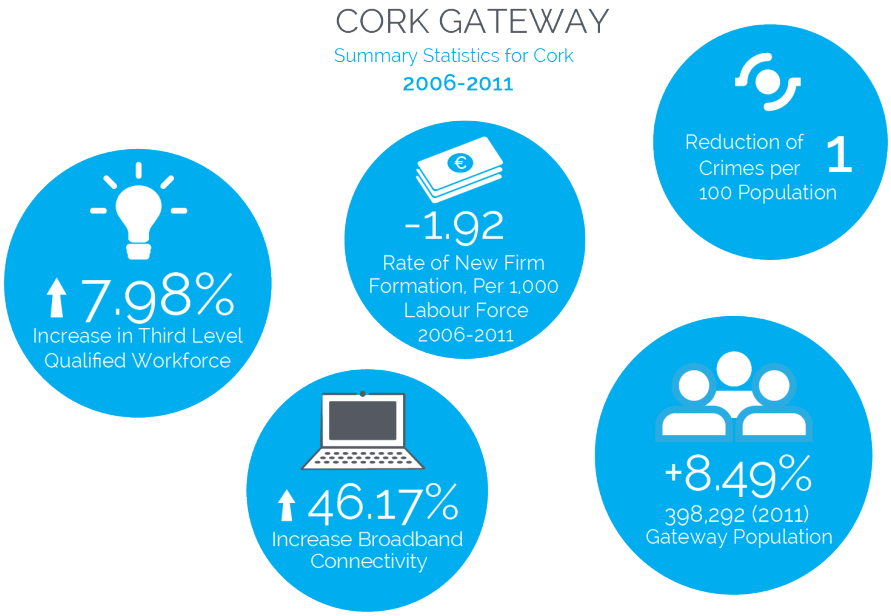
Cork's **Zone 1** (urban core) and **Zone 2** (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to the urban core, i.e. **Zone 1**, for work) areas are shown in the map below.




» The extent of the functional area of the Cork Gateway in 2012 remains largely unchanged to that identified in 2009;

» **Zone 2** can be seen to encompass a large proportion of the most densely populated areas of county Cork, and includes most of the larger towns of the county, including Ballincollig, Kinsale, Bandon, Macroom, Mallow, Fermoy, Midleton and Youghal.

### 4.6.1 Cork Gateway: Headline Findings from GHDI 2012

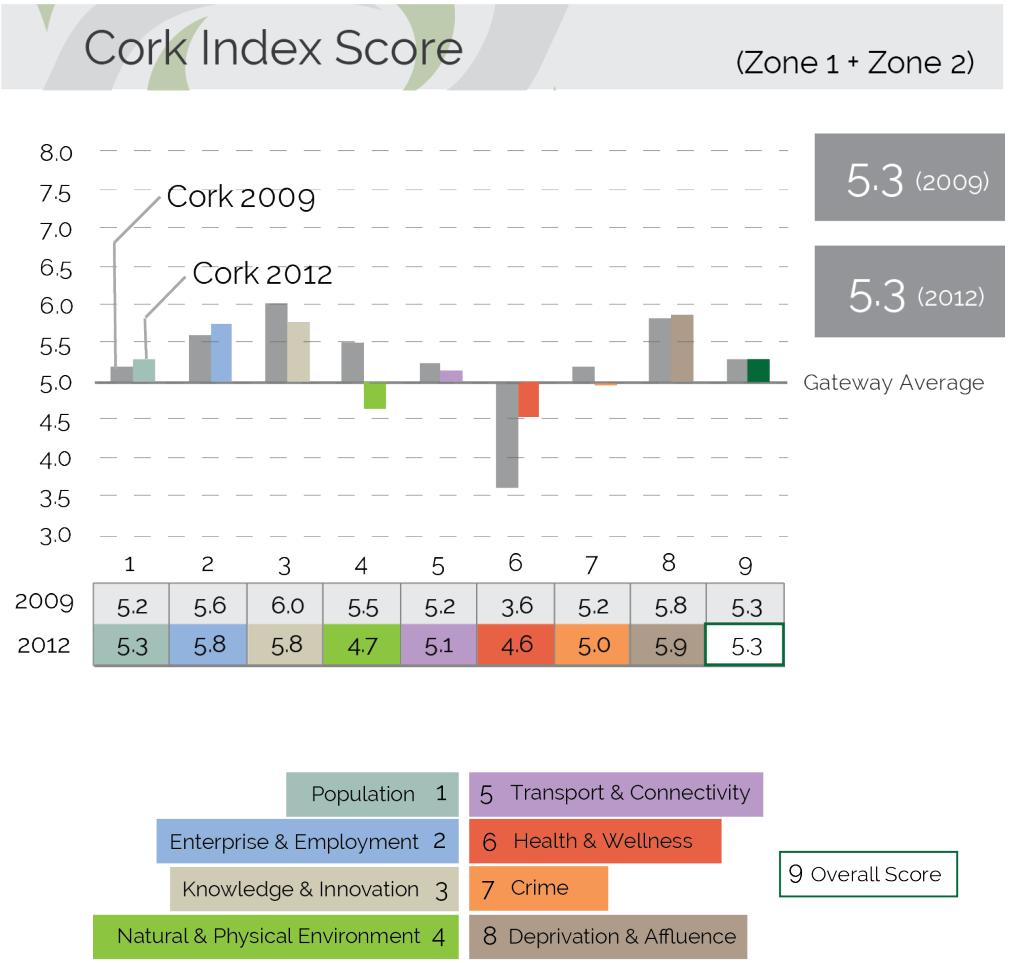



- Cork Gateway population (2011 Census) has increased by 8.49% compared to the 2006 Census and by 17.53% since 2002. The rate of population change in the Gateway between 2002-2006 and 2006-2011 increased by 0.16%. Despite an age dependency increase, the proportion of dependents remained below the average for all Gateways.
- Cork Gateway demonstrated strong performances in the domain of Enterprise and Employment and has an above average new firm formation rate.
- The 2011 unemployment rate is faring more positively than the national Gateway average.
- There has been an improvement in the quality of the Cork Gateway's labour force since 2006. The Cork Gateway remains amongst the most successful of all of the Gateways in attracting research and development funding. The average funding per enrolled student in 2010 for the Cork Gateway was €4,148 in comparison to the average for all Gateways for 2010 which was €2,405.
- The Cork Gateway is achieving mixed results in the Natural and Physical Environment domain.
- Analysis of the individual Cork Zones shows 51.79% of people living within **Zone 2** live within 30 minutes of their place of work, compared to 70.30% of people within **Zone 1**.
- The percentage of households with private broadband access has grown by 46.17% (to 66.37%) since 2006 within the Cork Gateway.
- In terms of the provision of retail outlets per 100 households, the Cork Gateway fared just below the average for the Gateways.
- The Cork Gateway measured acceptably under the Health and Wellness domain, with an improvement in YPLL (most notably in **Zone 2** which has a lower YPLL than **Zone 1**), and a provision of primary health care score which was just below average.

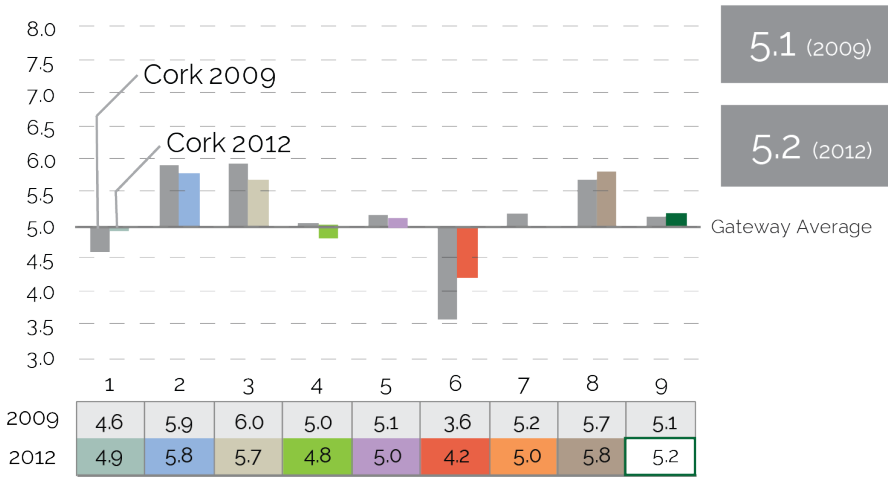
» Crime expressed per 100 of the population within the Cork Gateway has undergone a slight decrease based on a comparison of data from 2006 and 2011.

» Overall, Cork can be described as an affluent Gateway. The level of affluence in **Zone 2** has decreased since 2006, while there has been a noticeable increase in the affluence in **Zone 1**.

### 4.6.2 GHDI 2012 Score for Cork Gateway



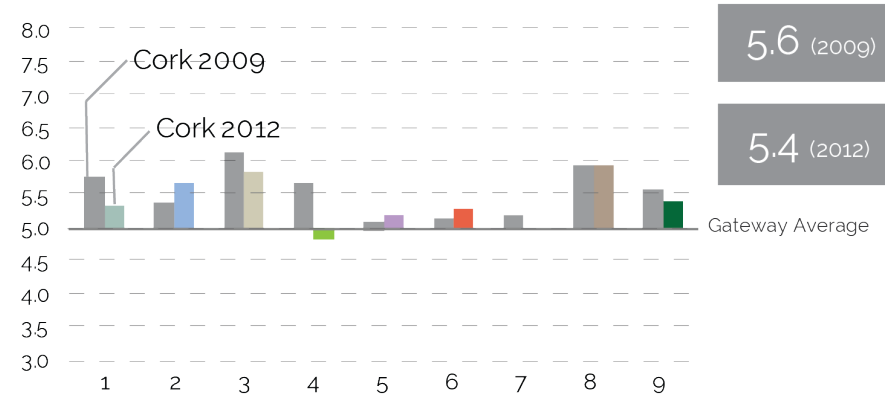
# Cork Zone 1 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 4.6 | 5.9 | 6.0 | 5.0 | 5.1 | 3.6 | 5.2 | 5.7 | 5.1 |
| 2012 | 4.9 | 5.8 | 5.7 | 4.8 | 5.0 | 4.2 | 5.0 | 5.8 | 5.2 |

Population 1
Enterprise & Employment 2
Knowledge & Innovation 3
Natural & Physical Environment 4
5 Transport & Connectivity
6 Health & Wellness
7 Crime
8 Deprivation & Affluence
9 Overall Score

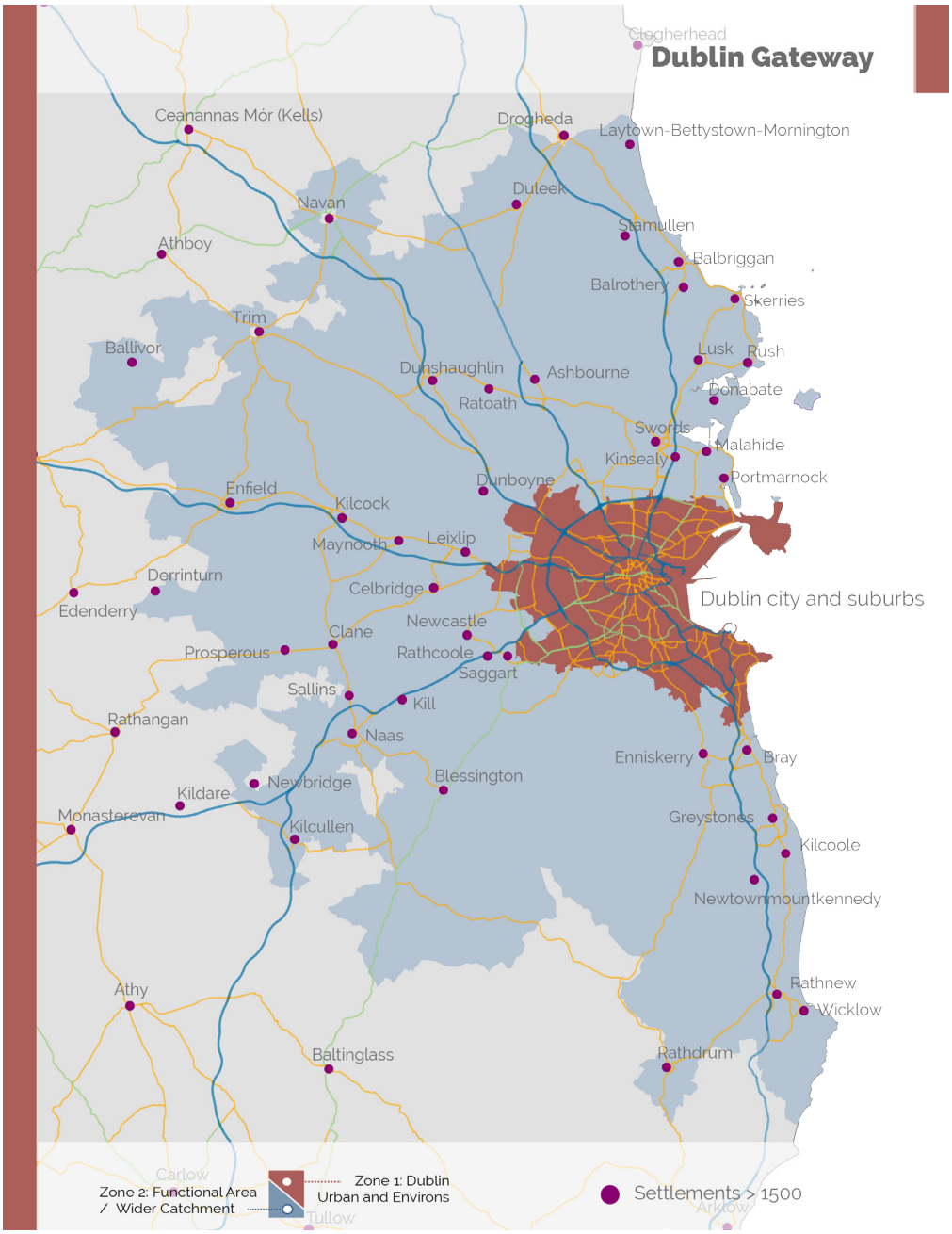
# Cork Zone 2 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 5.8 | 5.4 | 6.2 | 5.7 | 5.1 | 5.2 | 5.2 | 6.0 | 5.6 |
| 2012 | 5.4 | 5.7 | 5.9 | 4.9 | 5.2 | 5.3 | 5.0 | 6.0 | 5.4 |

## 4.7 Dublin Gateway

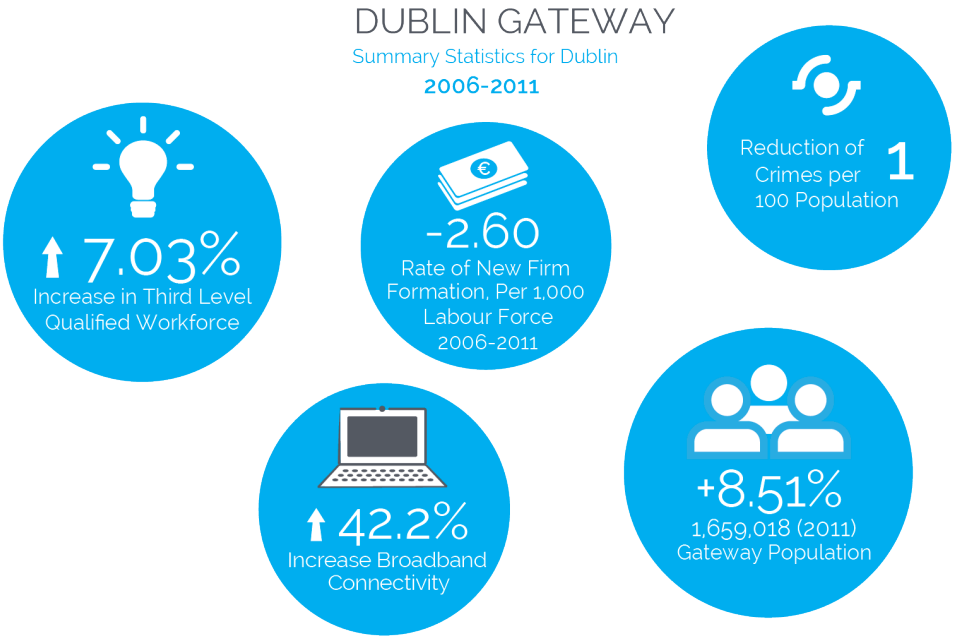
Dublin's **Zone 1** (urban core) and **Zone 2** (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to the urban core, i.e. **Zone 1**, for work) areas are shown in the map below.




» The extent of the functional area of the Dublin Gateway in 2012 remains largely unchanged to that identified in 2009;

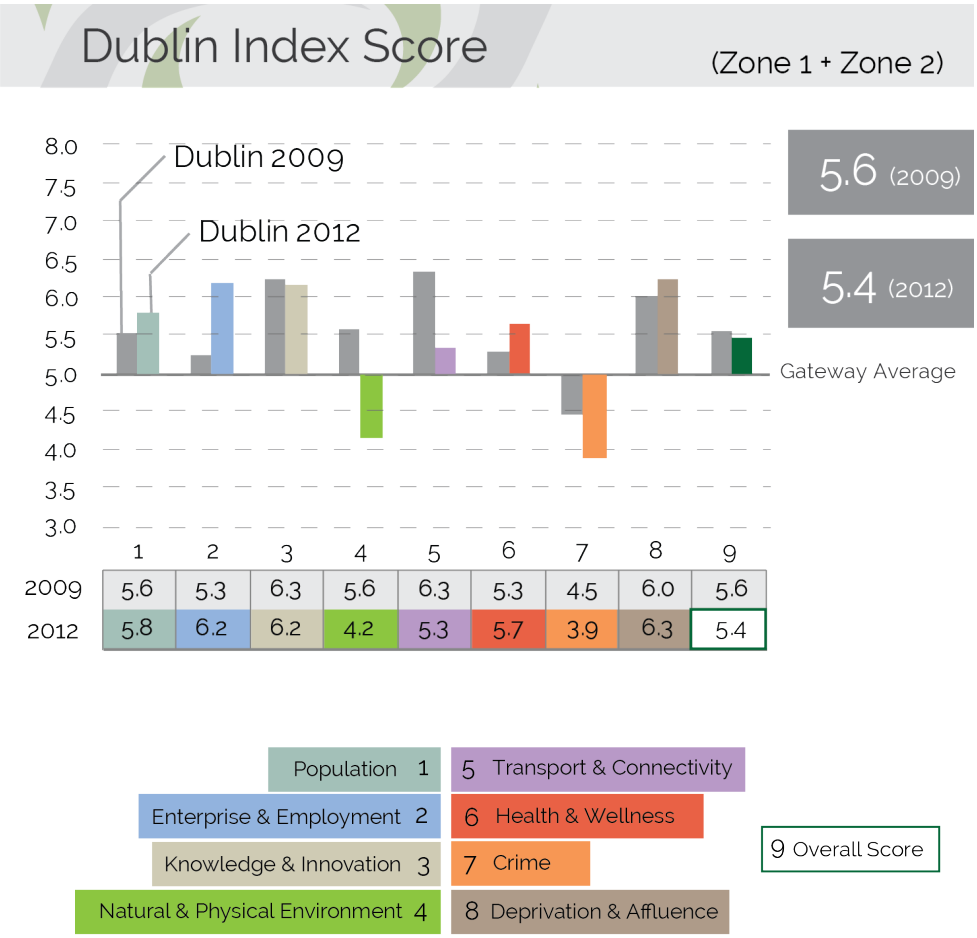
» Zone 2 can be seen to encompass large proportions of counties, Kildare, Wicklow and Meath.

### 4.7.1 Dublin Gateway: Headline Findings from GHDI 2012

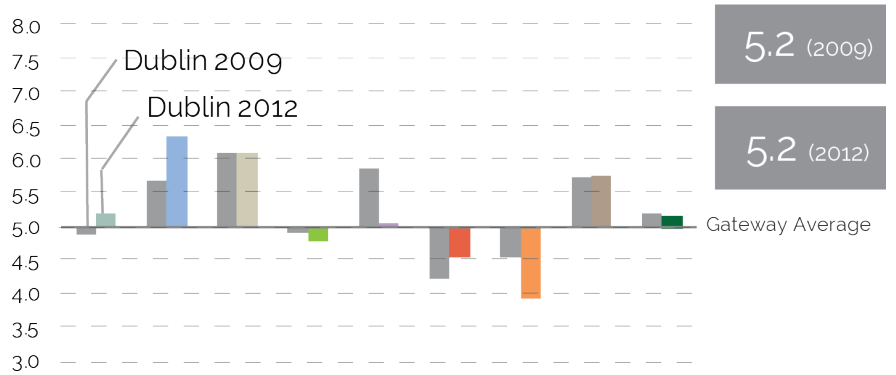



- The Dublin Gateway population increased by 8.51% compared to 2006, and 17.18% since 2002, while the rate of population change between 2002-2006 and 2006-2011 increased by 0.53%.
- The Dublin Gateway performed above the Gateway average for new firm formations and had second lowest unemployment rate of any of the Gateways.
- There was a very strong performance noted for the domain of Knowledge and Innovation. The Dublin Gateway was placed second among the Gateways in relation to the level of funding allocated for R&D purposes per student admission. The average funding per enrolled student in 2010 for the Dublin Gateway was €4,163 in comparison to the average for all Gateways for 2010 which was €2,405.
- The Dublin Gateway appears to be underperforming in the Natural and Physical Environment domain.
- The Dublin Gateway had the highest green transport use of all Gateways.
- The percentage of households with private broadband access (2011) has grown by 42.20% (to 72.98%) since 2006.
- The low Year of Potential Lost Life (YPLL) rate indicates a very low incidence of premature mortality, the healthy average birth weight of babies born in the Gateway and the above average provision of primary health care services is all positive news for the Gateway.
- There has only been a very slight reduction in the crime rate of the Dublin Gateway, which remains a weakness.
- There has been an overall improvement in the level of affluence which is experienced by residents since 2006.

### 4.7.2 GHDI 2012 Score for Dublin Gateway



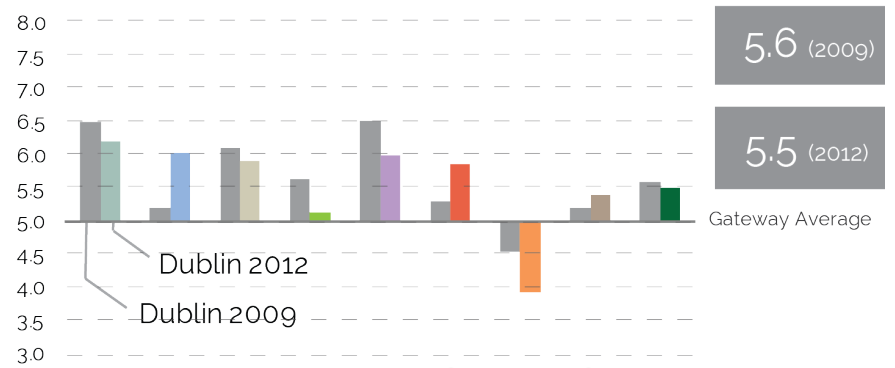
# Dublin Zone 1 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 4.9 | 5.7 | 6.1 | 4.9 | 5.7 | 4.2 | 4.5 | 5.8 | 5.2 |
| 2012 | 5.2 | 6.4 | 6.1 | 4.8 | 5.0 | 4.5 | 3.9 | 5.8 | 5.2 |

1 Population
2 Enterprise & Employment
3 Knowledge & Innovation
4 Natural & Physical Environment
5 Transport & Connectivity
6 Health & Wellness
7 Crime
8 Deprivation & Affluence
9 Overall Score

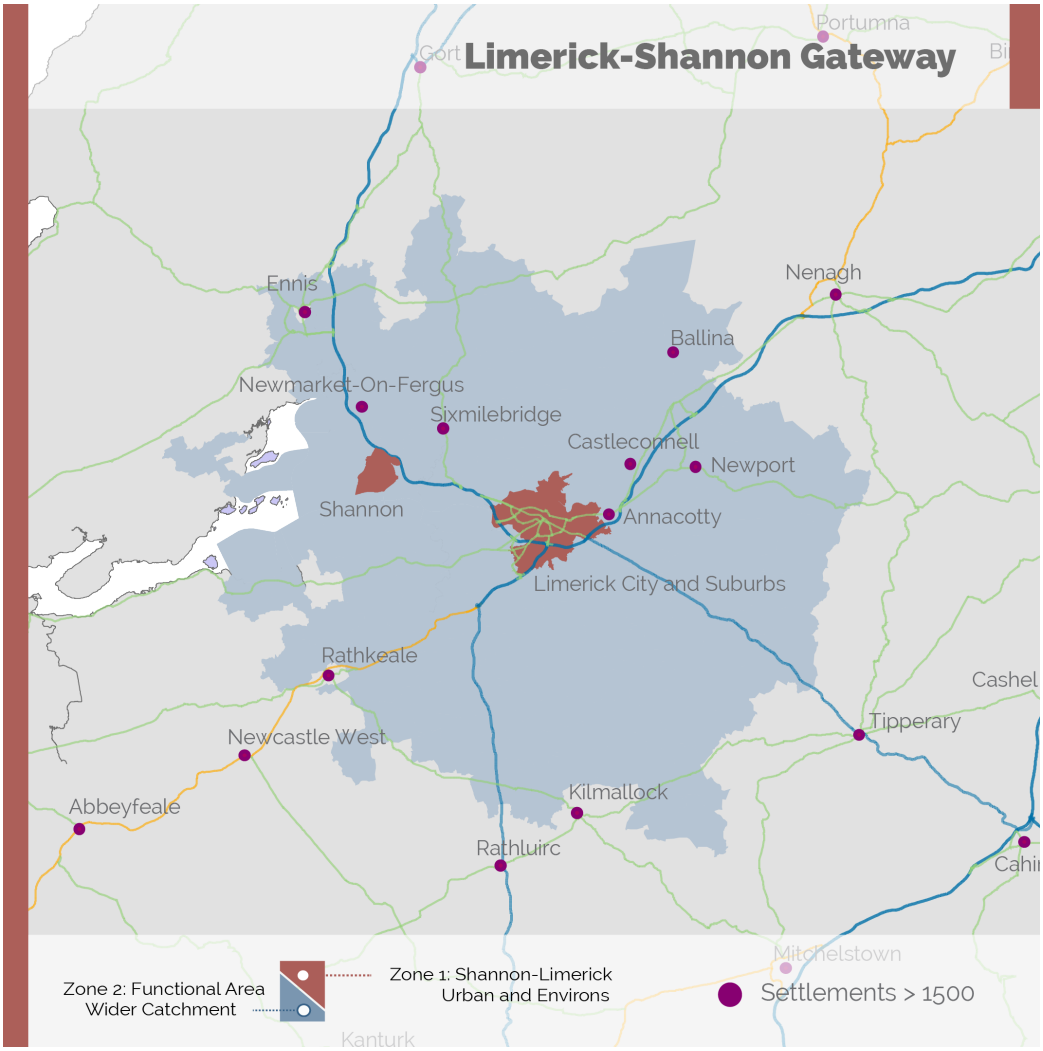
# Dublin Zone 2 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 6.5 | 5.2 | 6.1 | 5.6 | 6.5 | 5.3 | 4.5 | 5.2 | 5.6 |
| 2012 | 6.2 | 6.0 | 5.9 | 5.1 | 5.9 | 5.9 | 3.9 | 5.4 | 5.5 |

## 4.8 Limerick-Shannon Gateway

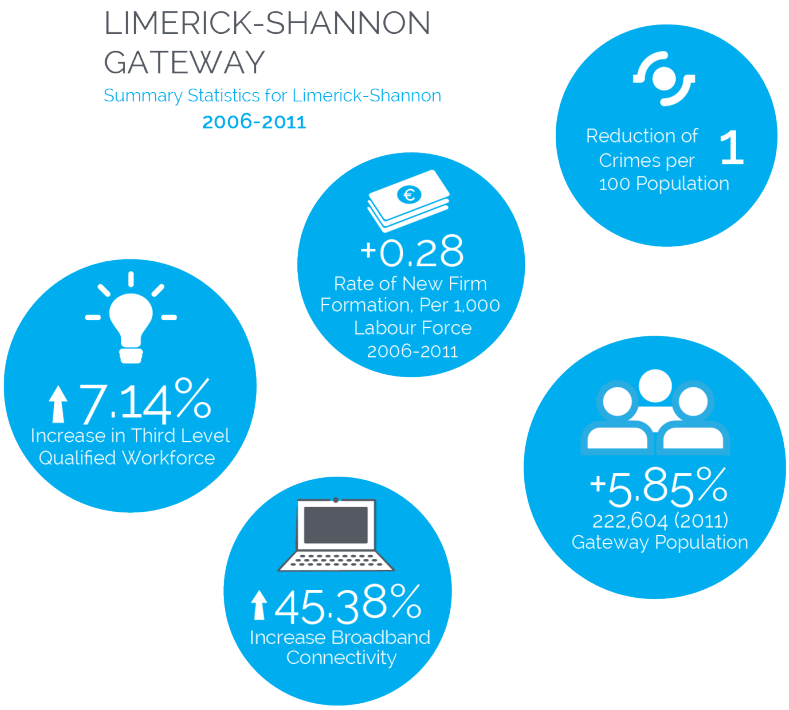
The Limerick-Shannon Gateway **Zone 1** area (urban core) and **Zone 2** area (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to the urban core, i.e. **Zone 1**, for work) are shown in the map below.




» The extent of the functional area of the Limerick-Shannon Gateway in 2012 remains largely unchanged to that identified in 2009;

» **Zone 2** can be seen to encompass much of county Limerick, as well as sizeable proportions of south county Clare, and west county Tipperary.

### 4.8.1 Limerick-Shannon Gateway: Headline Findings from GHDI 2012



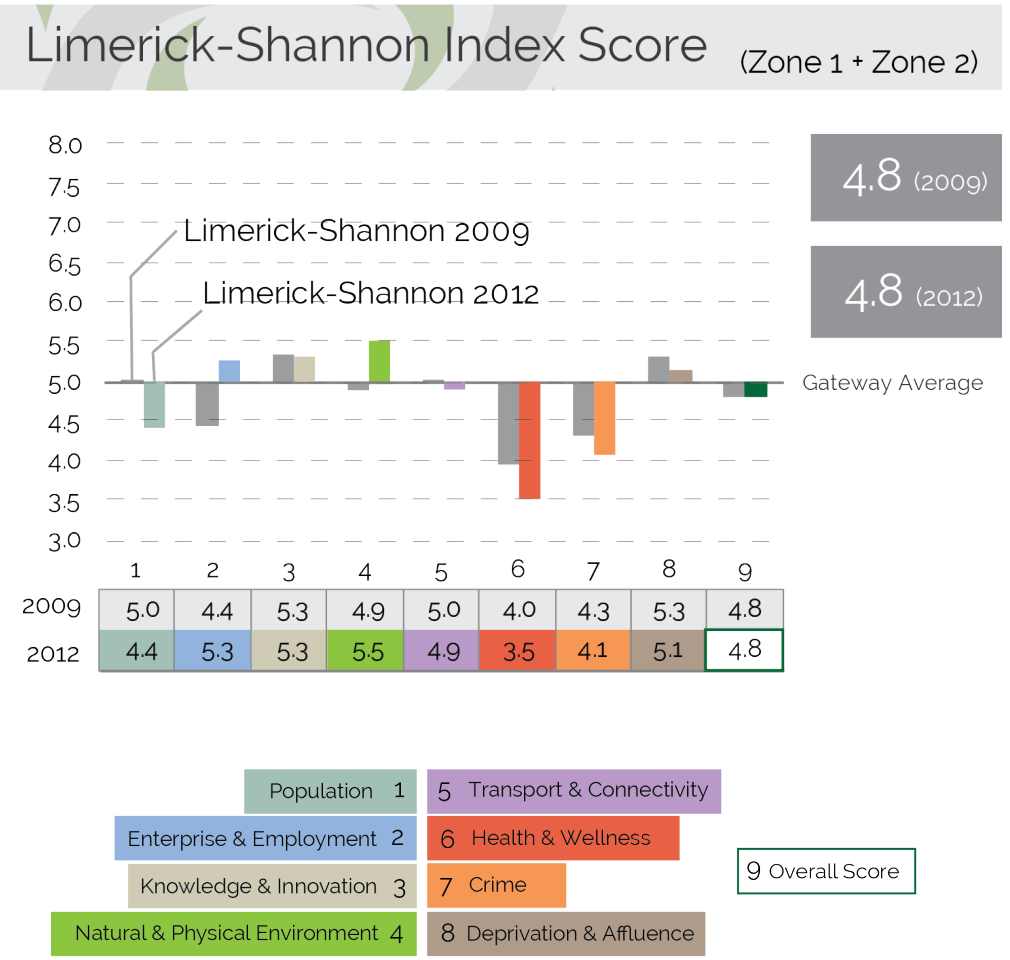

- The Limerick-Shannon population figure (Census 2011) has increased by 5.85% on that produced by the 2006 Census and 13.52% from that produced in the 2002 Census. The rate of population change between 2002 to 2006 and 2006 to 2011 decreased by 1.41%.
- 42.89% of the population living within the urban area (**Zone 1**) are classified as being dependent.
- New firm formations within the Gateway are well above the national Gateway average.
- The Limerick-Shannon Gateway recorded an unemployment rate of 19.69% in 2011. By comparison, the average unemployment figure for all Gateways in 2011 stood at 19.94%.
- The percentage of the labour force within the Limerick-Shannon Gateway (**Zones 1 and 2**) who hold a third level qualification has demonstrated overall growth of 7.14%, from 24.09% in 2006 to 31.23% in 2011.
- Limerick-Shannon was one of only three Gateways which demonstrated a trend of continuous growth in research and development funding over the period 2006 to 2010. The average funding per enrolled student in 2010 for the Limerick-Shannon Gateway was €3,550 in comparison to the average for all Gateways for 2010 which was €2,405.
- Overall the Limerick-Shannon Gateway is performing well in the Natural and Physical Environment domain.
- Evaluation of the indicators in the domain of transport and connectivity illustrates that the Limerick-Shannon Gateway has shown improvements in specific areas of the domain and the planned investment under the Limerick Smarter Travel Initiative will offer more sustainable modal choices in the Gateway.

» Analysis of the health and wellness domain reveals that the Limerick-Shannon Gateway is performing below average within all indicators of the domain, with a particularly high YPLL notable for **Zone 1** and a lower than average provision of primary health care services (as represented by GPs per 100 of the population).

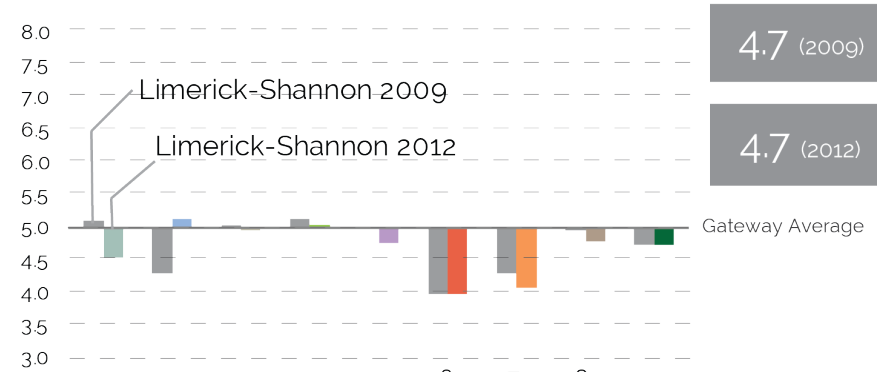
» Analysis of the crime figures for the Limerick-Shannon Gateway illustrates a slight decrease in the overall crime rate, from 7.32 crimes per 100 of the population in 2006 to 6.38 crimes per 100 of the population in 2011.

» An examination of the affluence and deprivation Index for the Limerick-Shannon Gateway indicates that there has been an overall improvement in the level of affluence which is experienced by residents of the Gateway since 2006.

### 4.8.2 GHDI 2012 Score for Limerick-Shannon Gateway



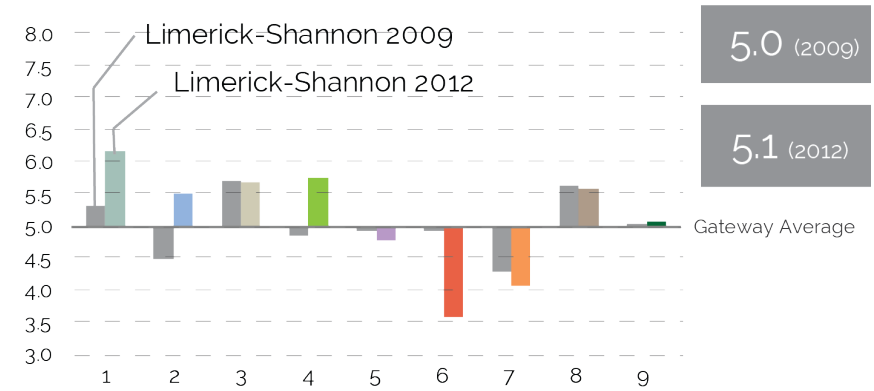
# Limerick-Shannon Zone 1 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 5.1 | 4.3 | 5.0 | 5.1 | 5.0 | 4.0 | 4.3 | 5.0 | 4.7 |
| 2012 | 4.6 | 5.1 | 5.0 | 5.0 | 4.8 | 4.0 | 4.1 | 4.8 | 4.7 |

Population 1
Enterprise & Employment 2
Knowledge & Innovation 3
Natural & Physical Environment 4
5 Transport & Connectivity
6 Health & Wellness
7 Crime
8 Deprivation & Affluence
9 Overall Score

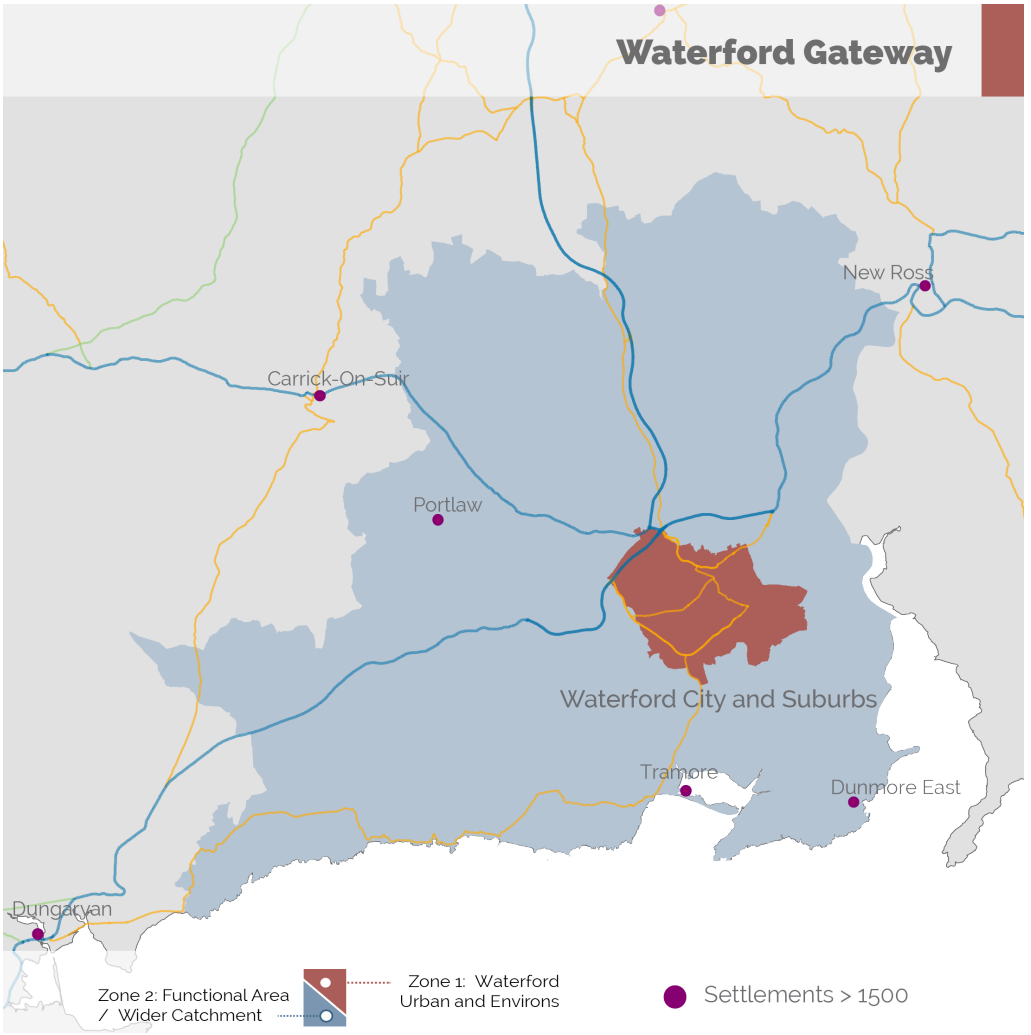
# Limerick-Shannon Zone 2 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 5.3 | 4.5 | 5.7 | 4.8 | 4.9 | 4.9 | 4.3 | 5.6 | 5.0 |
| 2012 | 6.2 | 5.5 | 5.7 | 5.7 | 4.8 | 3.6 | 4.1 | 5.6 | 5.1 |

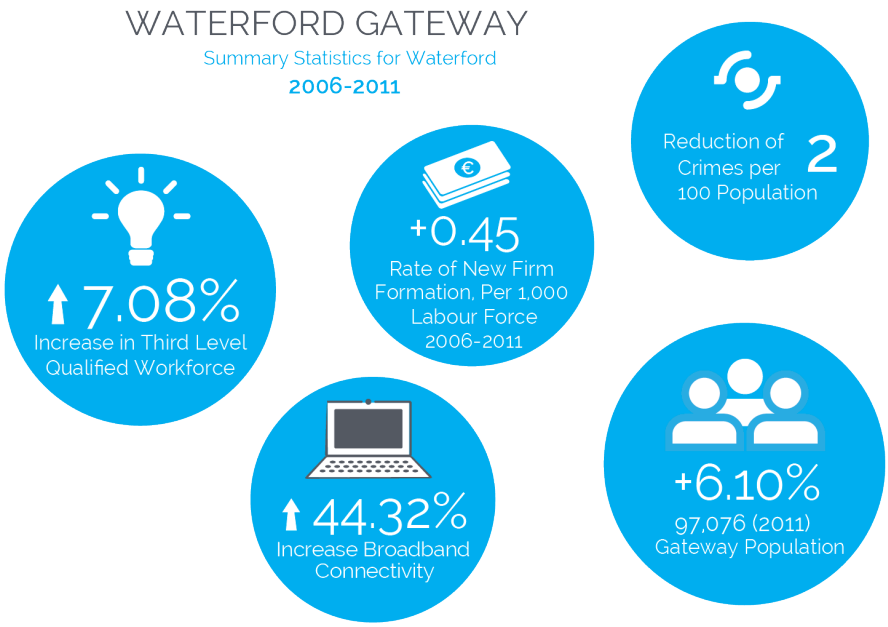
## 4.9 Waterford Gateway

The Waterford Gateway **Zone 1** area (urban core) and **Zone 2** area (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to the urban core, i.e. **Zone 1**, for work) are shown in the map below.




- The extent of the functional area of the Waterford Gateway in 2012 remains largely unchanged to that identified in 2009;
- Zone 2 can be seen to encompass the majority of the east of county Waterford, along with a large proportion of south Kilkenny.

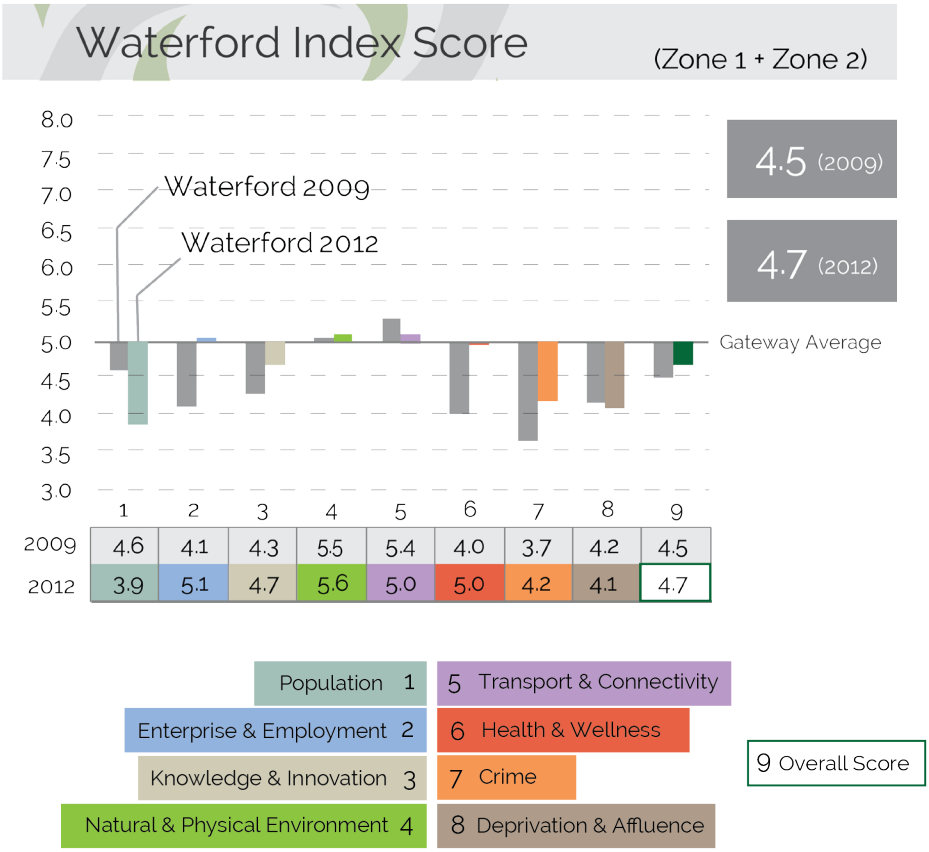
### 4.9.1 Waterford Gateway: Headline Findings from GHDI 2012



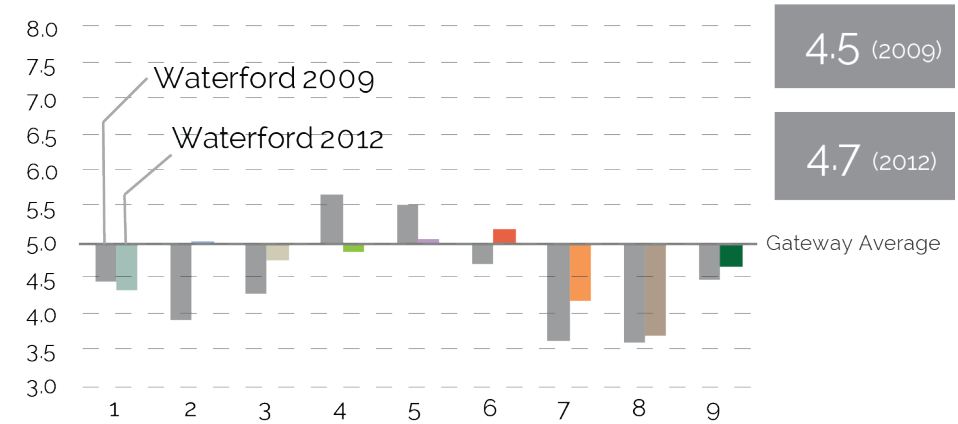

- The Waterford Gateway recorded a population increase of 6.10% (Census, 2011) on that produced in 2006, and 14.60% from that produced in 2002. The rate of population change between 2002 to 2006 and 2006 to 2011 decreased by 1.92%.
- 48.88% of the population living within the urban area (**Zone 1**) are classified as being dependent; 55.86% in **Zone 2**.
- Waterford recorded the highest rate, among all Gateways, of new firm formations per 1,000 of the labour force.
- The overall Gateway returned an unemployment rate of 22.30% in 2011. The average unemployment figure for all Gateways in 2011 stood at 19.94%.
- The Waterford Gateway demonstrated a trend of continuous growth in research and development funding over the period 2006 to 2010. The average funding per enrolled student in 2010 for the Gateway was €3,035 in comparison to the average for all Gateways for 2010 which was €2,405.
- The Waterford Gateway produced an above average performance in the Natural and Physical Environment Domain.
- The number of people who live within 30 minutes of their work has improved slightly since 2006, and is the highest out of all the Gateways. However, despite this clear advantage, the Gateway has seen a weakening in the transport modal shift with fewer people walking, cycling or using public transport to commute to or from work.
- Comparatively, the Waterford Gateway does not have a good record relating to Years of Potential Life Lost (YPLL), which is higher than the national average. However, an improvement on the 2006 YPLL is evident. Birth weight is also slightly lower than average.
- The crime rate has gone down slightly based on 2006 figures, which is positive news for the Gateway.

» The Gateway shows high levels of deprivation for parts of **Zone 1**, with parts of **Zone 2** also slightly deprived.

### 4.9.2 GHDI 2012 Score for Waterford Gateway



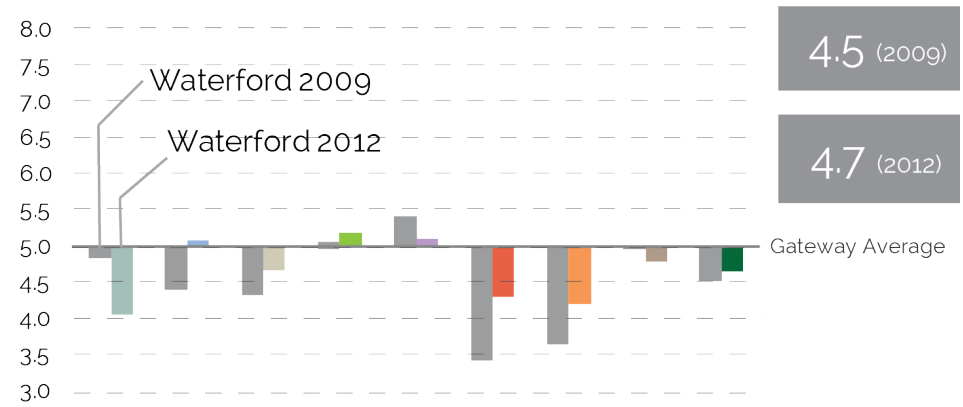
# Waterford Zone 1 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 4.5 | 3.9 | 4.3 | 5.6 | 5.5 | 4.7 | 3.6 | 3.6 | 4.5 |
| 2012 | 4.4 | 5.0 | 4.8 | 4.9 | 5.0 | 5.2 | 4.2 | 3.7 | 4.7 |

Population 1
Enterprise & Employment 2
Knowledge & Innovation 3
Natural & Physical Environment 4
5 Transport & Connectivity
6 Health & Wellness
7 Crime
8 Deprivation & Affluence
9 Overall Score

# Waterford Zone 2 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 4.8 | 4.4 | 4.3 | 5.0 | 5.3 | 3.4 | 3.6 | 5.0 | 4.5 |
| 2012 | 4.0 | 5.1 | 4.7 | 5.1 | 5.1 | 4.3 | 4.2 | 4.8 | 4.7 |

# 5.0 Summary of Hub Findings

This section presents a brief overview of the headline findings for the nine Hubs, which are:

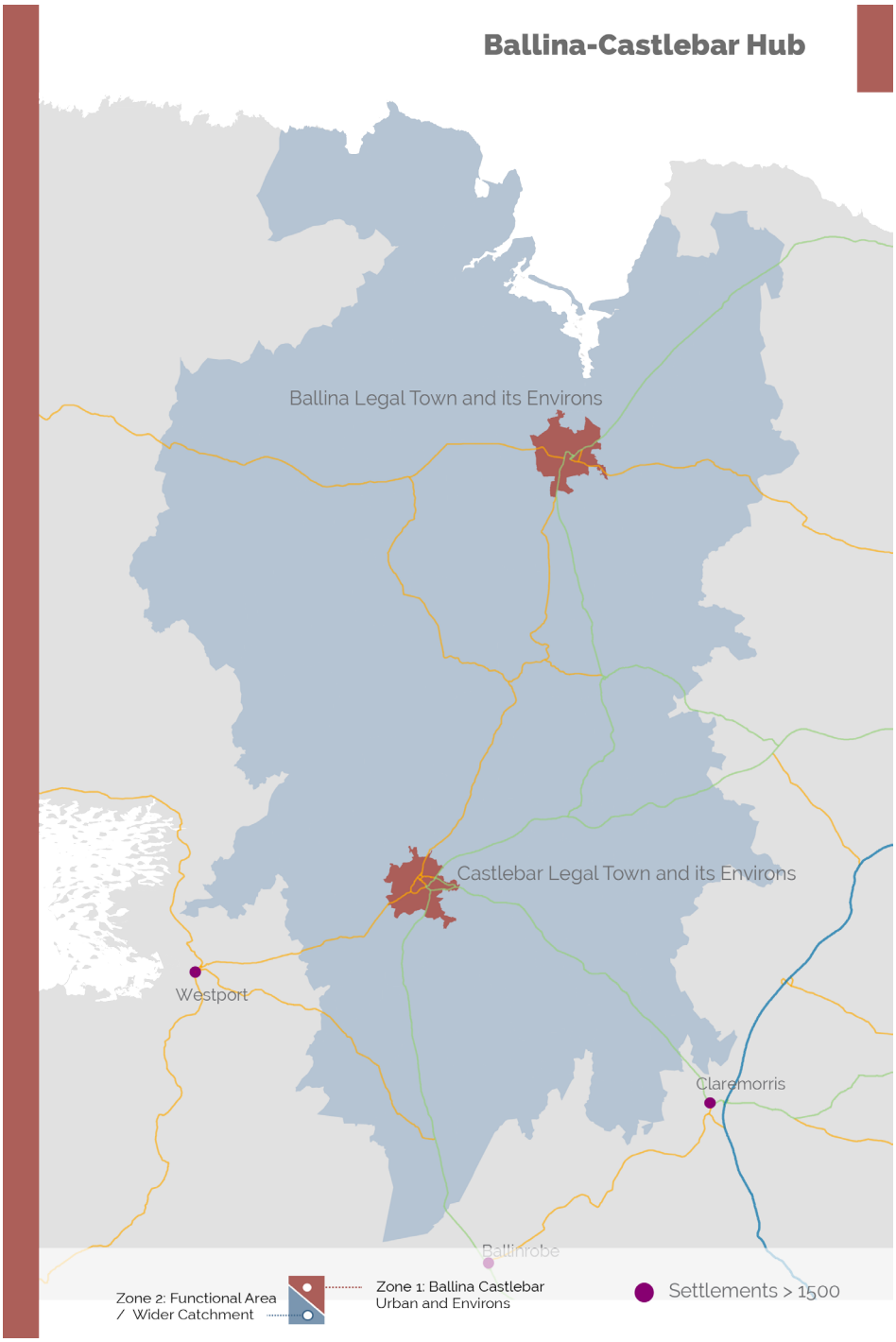
- » Ballina-Castlebar
- » Cavan
- » Ennis
- » Kilkenny
- » Tralee-Killarney
- » Mallow
- » Monaghan
- » Tuam
- » Wexford

For full details of the socio-economic performance of each of the nine Hubs please refer to the Gateways and Hubs Development Index 2012, Hubs Report[40].

40 www.bmwassembly.ie/Gateways%20and%20Hubs%20Report/index.html
www.seregassembly.ie/en/info/gateways_hubs

## 5.1 Ballina-Castlebar Hub

The Ballina-Castlebar Hub **Zone 1** area (urban core) and **Zone 2** area (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to either urban core, i.e. **Zone 1**, for work) are shown in the map below.

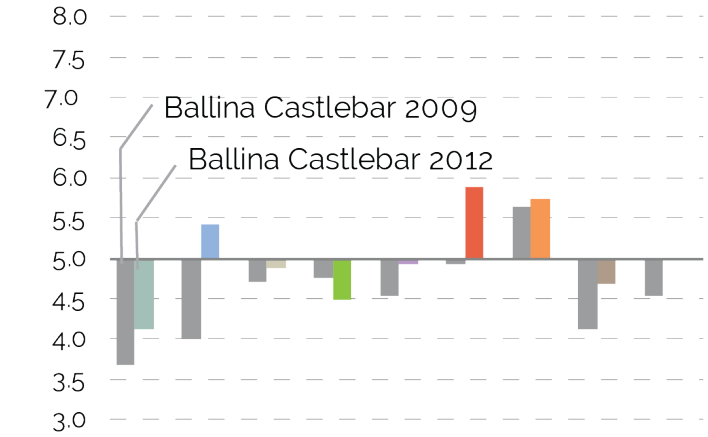


### 5.1.1 Ballina-Castlebar Hub: Headline Findings from GHDI 2012

- A comparatively low population increase (5.80%) took place in this Hub between 2006 and 2011. The population is growing at a faster rate in Zone 2 than in Zone 1.
- There is a comparatively high dependency rate for this Hub.
- A slightly lower than average number of new firm formations is notable for 2011.
- The Hub has a comparatively high share of services in the economy.
- Although the unemployment rate has increased significantly since 2006, it is lower than the average rate for the Hubs.
- The number of people with third level qualifications (25.61%) in the Ballina-Castlebar labour force has increased since 2006 and aligns with the national average for Hubs.
- In 2011, river water quality in the Hub was of good quality status.
- There has been no change in the number (one) of consumable water sources, which featured on the EPA RAL between 2008 and 2012.
- The 2011 household waste recovery rate (33.45%) for Mayo is below the national average.
- The decline in the number of people using green transport modes was more significant in this Hub than in any other Hub, with the lowest green transport usage rate across the Hub towns.
- Overall, a slight decrease in the number of people who live within 30 minutes of their work place occurred between 2006 and 2011. However, despite the overall decrease, a modest increase is notable for Zone 1.
- Accessibility within the Hub is reasonable in comparison to other Hubs. The Hub has a relatively high number of retail units per 100 households.
- Broadband take-up in this Hub (56.99%) is broadly in line with the average for the Hubs (1% lower).
- The Years of Potential Life Lost (YPLL) was comparatively low in 2011 and lower than the national average, which is positive news for the Hub.
- The birth weight of babies born in this Hub is marginally higher than average.
- In 2011, the Hub has a slightly higher than average number of GPs per 1,000 of the population.
- A very marginal decrease in the number of crimes per 100 of the population occurred in 2011 compared with 2006 figures (the Hub has a lower than average crime rate).
- The Hub is marginally deprived, although an improvement on the 2006 rate is noted (the deprivation rate is higher than average for the Hubs).

### 5.1.2 GHDI 2012 Score for Ballina-Castlebar Hub

## Ballina Castlebar Index Score (Zone 1 + Zone 2)




4.5 (2009)

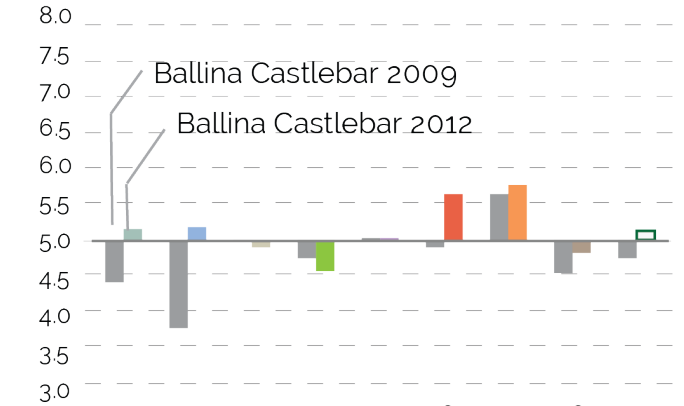
5.0 (2012)

Hub Average

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 3.7 | 4.0 | 4.7 | 4.8 | 4.5 | 4.9 | 5.6 | 4.1 | 4.5 |
| 2012 | 4.1 | 5.4 | 4.9 | 4.5 | 4.9 | 5.9 | 5.7 | 4.7 | 5.0 |

1 Population
2 Enterprise & Employment
3 Knowledge & Innovation
4 Natural & Physical Environment
5 Transport & Connectivity
6 Health & Wellness
7 Crime
8 Deprivation & Affluence
9 Overall Score

## Ballina Castlebar Zone 1 Index Score



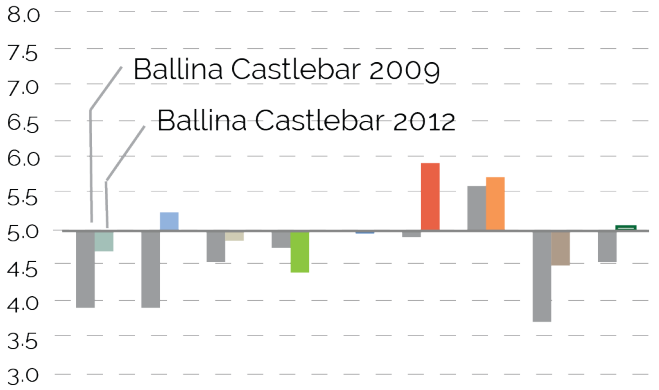

4.8 (2009)

5.1 (2012)

Hub Average

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 4.4 | 3.8 | 5.0 | 4.8 | 5.0 | 4.9 | 5.6 | 4.6 | 4.8 |
| 2012 | 5.2 | 5.2 | 4.9 | 4.6 | 5.0 | 5.6 | 5.7 | 4.8 | 5.1 |

# Ballina Castlebar Zone 2 Index Score




4.6 (2009)

5.1 (2012)

Hub Average

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 3.9 | 3.9 | 4.6 | 4.8 | 5.0 | 4.9 | 5.6 | 3.7 | 4.6 |
| 2012 | 4.7 | 5.2 | 4.9 | 4.4 | 5.0 | 5.9 | 5.7 | 4.5 | 5.1 |

1 Population

2 Enterprise & Employment

3 Knowledge & Innovation

4 Natural & Physical Environment

5 Transport & Connectivity

6 Health & Wellness

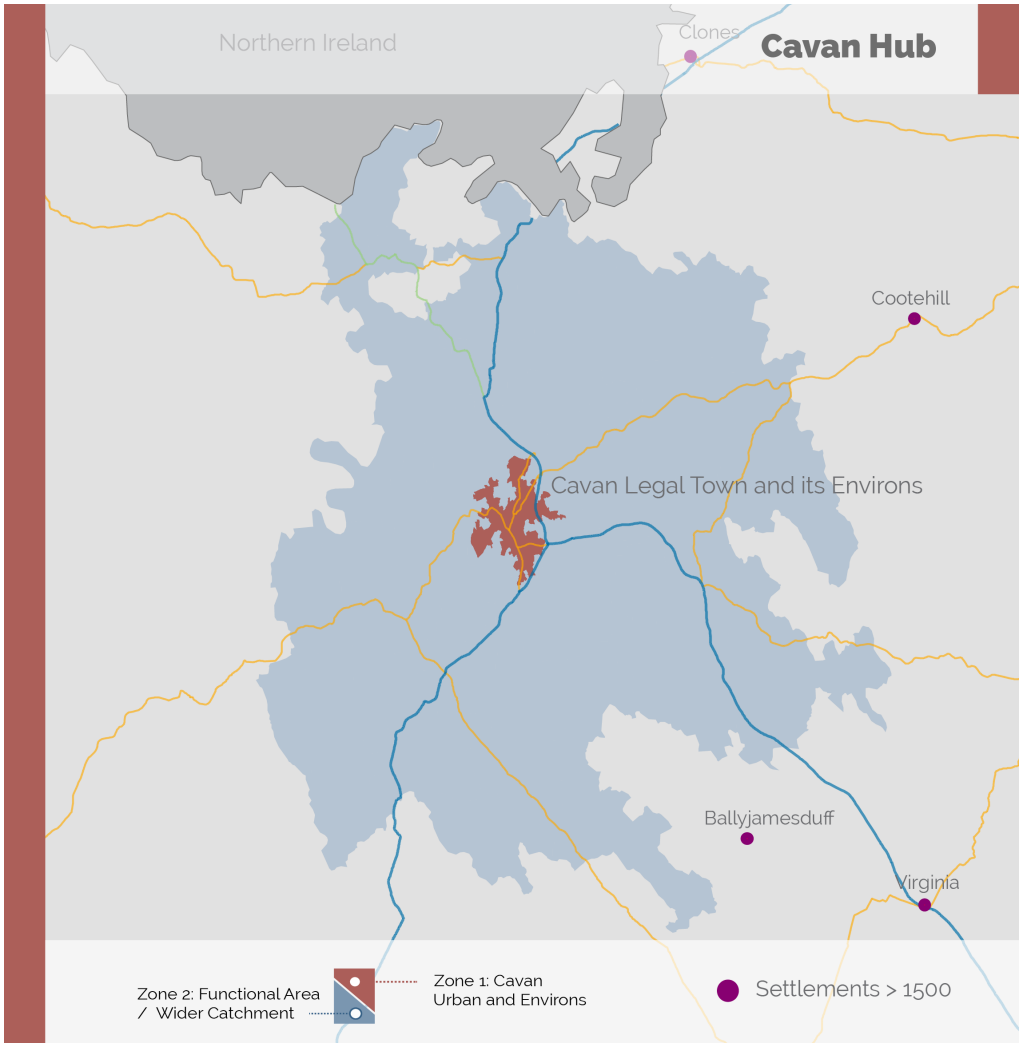
7 Crime

8 Deprivation & Affluence

9 Overall Score

## 5.2 Cavan Hub

The Cavan Hub **Zone 1** area (urban core) and **Zone 2** area (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to the urban core, i.e. **Zone 1**, for work) are shown in the map below.



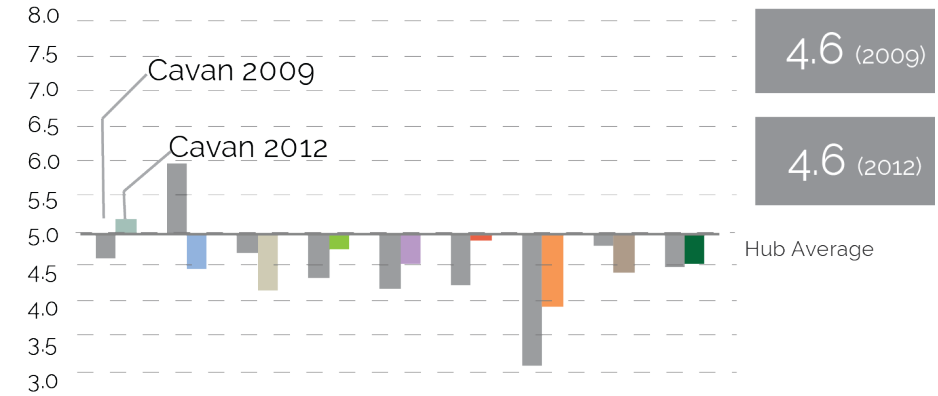
### 5.2.1 Cavan Hub: Headline Findings from GHDI 2012

- The population increase (8.35%) occurring in Cavan between 2006 and 2011 was more significant than any other Hub.
- There is a comparatively high dependency rate for this Hub.
- The decline in the number of new firms formed in 2011 compared with 2006 is greater in this Hub than in any other Hub (although this is due to the high number of new firms established in 2006, as the 2011 rate roughly aligns with the national average for Hubs).
- At 0.82%, Cavan's share of services in the economy is below the national average for Hubs.
- The unemployment rate has risen significantly since 2006 and in 2011 was one of the highest unemployment rates recorded for the national Hubs.
- Although progress has been made in the number of people in the Cavan Hub labour force with third level qualifications (18.27%) since 2006, the Hub has a slightly lower than average rate for this indicator. Zone 2 has outperformed Zone 1 for this indicator.
- In 2012 river water quality within the Hub was of good quality status.
- There has been no change in the number of consumable water sources listed on the EPA RAL since 2008.
- The 2011 household waste recovery rate (34.87%) for Cavan County is considerably higher than it was in 2006, but is below the national waste recovery rate for 2011.
- More people were choosing green transport modes in 2006 than in 2011 for the Hub as a whole but the Hub has the second lowest usage rates for green transport out of all the Hubs.
- The number of people who live within 30 minutes of their work place was marginally lower in 2011, than in 2006 (although remains slightly higher than the national average for Hubs).
- The Cavan Hub has the lowest public transport accessibility ratings of all the Hubs.
- Cavan has the third highest number of retail outlets per 100 households out of the Hubs and is above the average for the national Hubs.
- Although major progress has been made in the availability of broadband since 2006, the number of households taking-up private access to broadband in 2011 was the lowest of all the Hubs (55.71%).
- The Years of Potential Life Lost (YPLL) in the Hub has improved (decreased) since 2006 but is higher than the national average for Hubs.
- The birth weight of babies born in this Hub is marginally lower than average.
- The number of GPs per 1,000 of the population is above the national average for the Hubs.
- A very slight drop is notable in the number of crimes occurring per 100 of the population in 2011 compared with 2006.
- The Hub is marginally deprived and the situation has worsened across the Hub since 2006.

### 5.2.2 GHDI 2012 Score for Cavan Hub

## Cavan Index Score

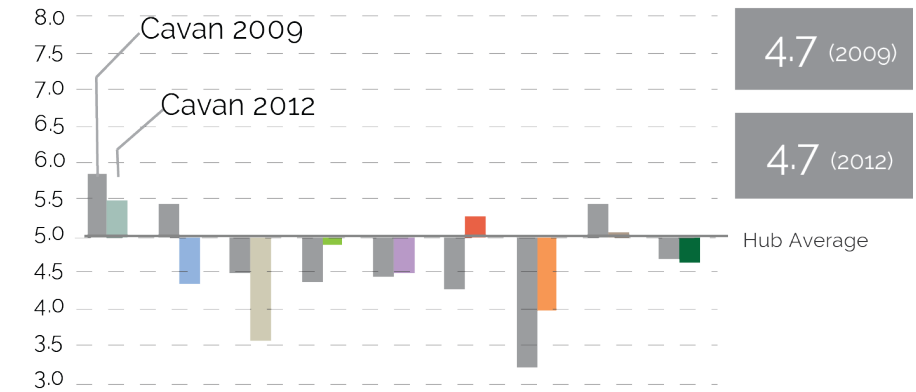
(Zone 1 + Zone 2)




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 4.7 | 6.0 | 4.8 | 4.4 | 4.3 | 4.3 | 3.2 | 4.8 | 4.6 |
| 2012 | 5.2 | 4.5 | 4.2 | 4.8 | 4.6 | 4.9 | 4.0 | 4.5 | 4.6 |

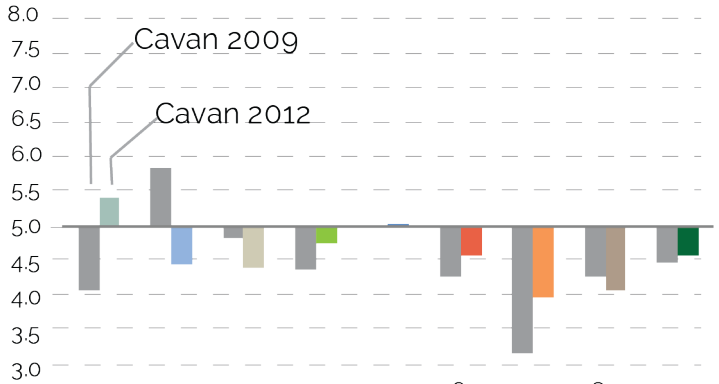
1 Population
2 Enterprise & Employment
3 Knowledge & Innovation
4 Natural & Physical Environment
5 Transport & Connectivity
6 Health & Wellness
7 Crime
8 Deprivation & Affluence
9 Overall Score

## Cavan Zone 1 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 5.9 | 5.5 | 4.5 | 4.4 | 4.5 | 4.3 | 3.2 | 5.5 | 4.7 |
| 2012 | 5.5 | 4.4 | 3.6 | 4.9 | 4.5 | 5.3 | 4.0 | 5.1 | 4.7 |

# Cavan Zone 2 Index Score




4.5 (2009)

4.6 (2012)

Hub Average

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 4.1 | 5.8 | 4.8 | 4.4 | 5.0 | 4.3 | 3.2 | 4.3 | 4.5 |
| 2012 | 5.4 | 4.5 | 4.4 | 4.7 | 5.0 | 4.6 | 4.0 | 4.1 | 4.6 |

1 Population

2 Enterprise & Employment

3 Knowledge & Innovation

4 Natural & Physical Environment

5 Transport & Connectivity

6 Health & Wellness

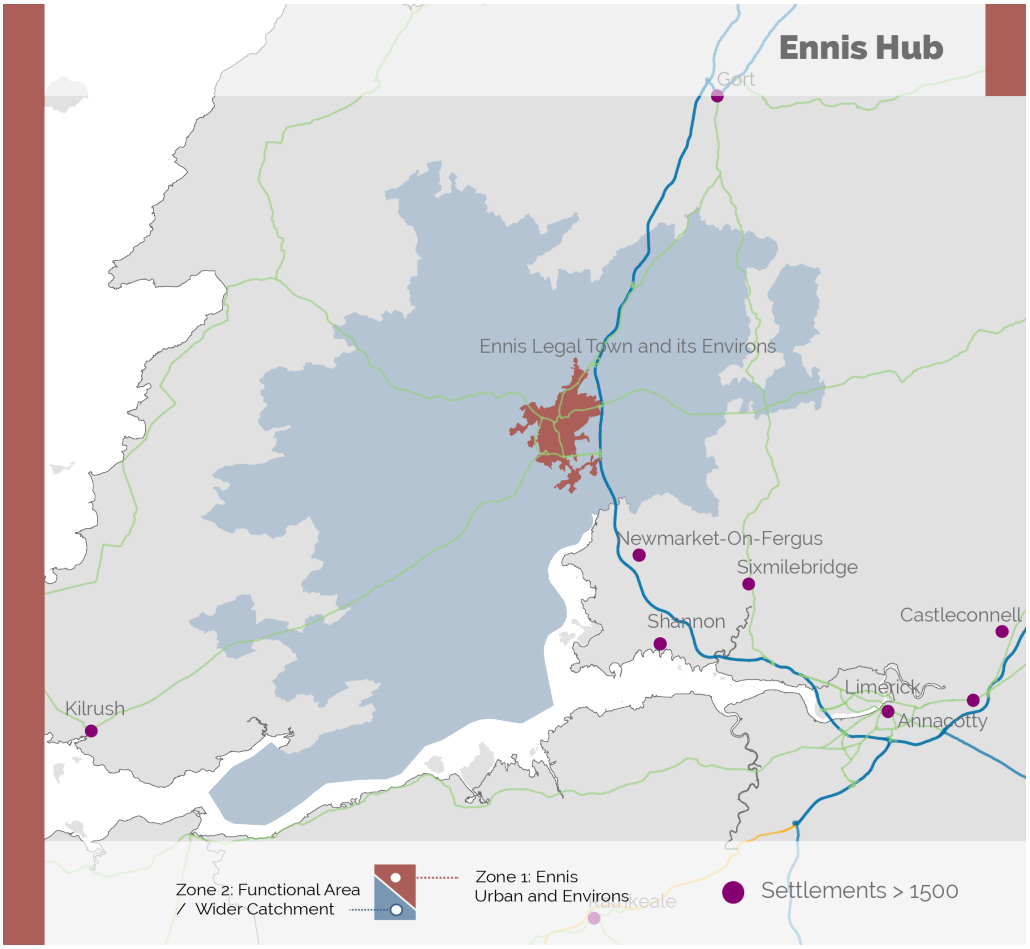
7 Crime

8 Deprivation & Affluence

9 Overall Score

## 5.3 Ennis Hub

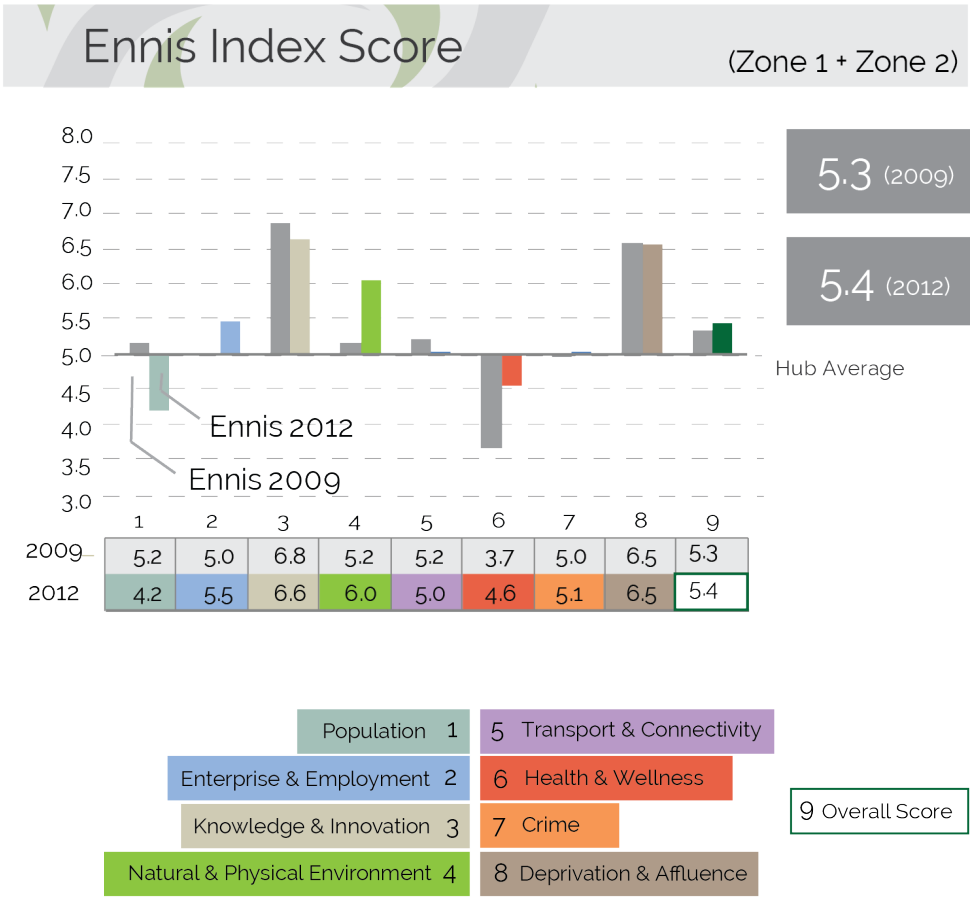
The Ennis Hub **Zone 1** area (urban core) and **Zone 2** area (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to the urban core, i.e. **Zone 1**, for work) are shown in the map below.



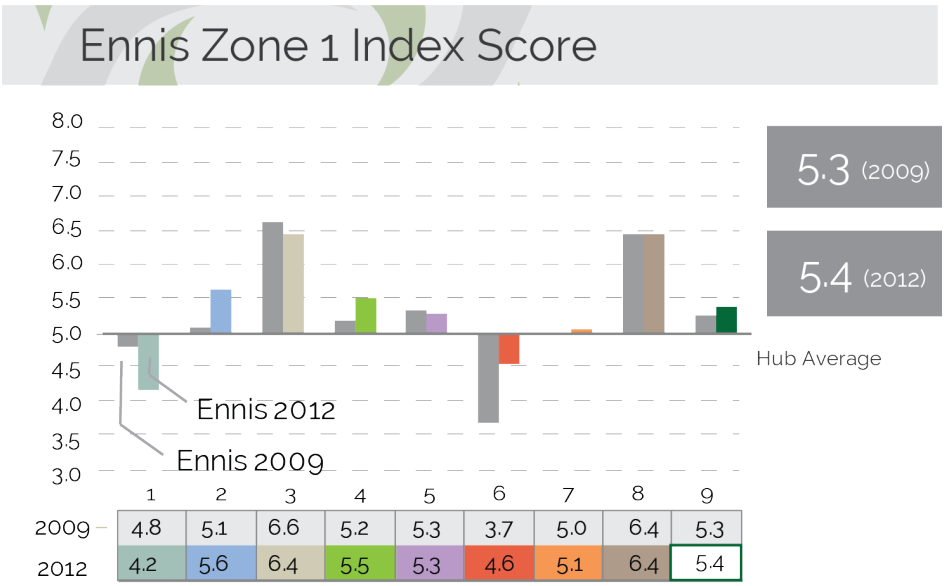
### 5.3.1 Ennis Hub: Headline Findings from GHDI 2012

- » While a greater proportion of the Hub population live in Zone 1, Zone 2 is growing at a faster rate than Zone 1.
- » The dependency rate for this Hub is broadly in line (marginally higher) with the national average for Hubs.
- » Although the number of new firms formed in 2011 has decreased compared with 2006, the extent of decrease experienced in the Ennis Hub is not as significant as has been the case in the majority of Hubs and is above the national average for Hubs.
- » The Hub's share of services in the economy rates favourably in comparison to the other Hubs (1.25%).
- » Although significantly increased since 2006, the 2011 unemployment rate is the lowest out of all the Hubs (18.64%).
- » The number of people with a third level qualification in the Ennis Hub labour market has risen substantially since 2006 and is the highest of all the Hubs (30.76%).
- » River water quality was classified as of good quality status in 2011.
- » There were no water supply sources listed on the EPA Remedial Action List (RAL) for 2011, indicating a high standard of drinking water quality in the Hub and an improvement on 2008 when one water source was listed on the RAL.
- » More household waste was diverted from landfill for recovery in 2011 than in 2006, and the quantities recovered in Clare County were the highest (47.41%) out of all the Hub counties.
- » A comparatively low number of people use public transport, walk or cycle in the Hub and this number has declined since 2006.
- » The number of people who live within 30 minutes of their work place has improved since 2006 in both Zone 1 and Zone 2.
- » The public transport accessibility rating for the Hub is slightly better than the national average for Hubs.
- » The number of retail outlets per 100 households is marginally below the average for the national Hubs.
- » The number of households with private broadband access in 2011 has improved significantly since 2006 and the Hub is comparatively well served in this regard.
- » The 2011 Year of Potential Life Lost (YPLL) in the Hub has improved since 2006 (decreased) and was the third lowest (best) of all the Hubs.
- » The birth weight of babies born in this Hub is broadly in keeping with average birth weights.
- » The Hub has a lower than average number of GPs per 1,000 of the population.
- » There has been a decrease in the number of crimes per 100 of population from 4.97 in 2006 to 4.12 in 2011. The 2011 crime rate is below the national average for Hubs.
- » The Ennis Hub scored an overall rate of 0.39 on the Affluence and Deprivation Index indicating a marginal level of affluence, although this is slightly down on the 2006 score. However, Zone 2 has fallen into marginal deprivation with a negative result on the Affluence and Deprivation Index.

### 5.3.2 GHDI 2012 Score for Ennis Hub

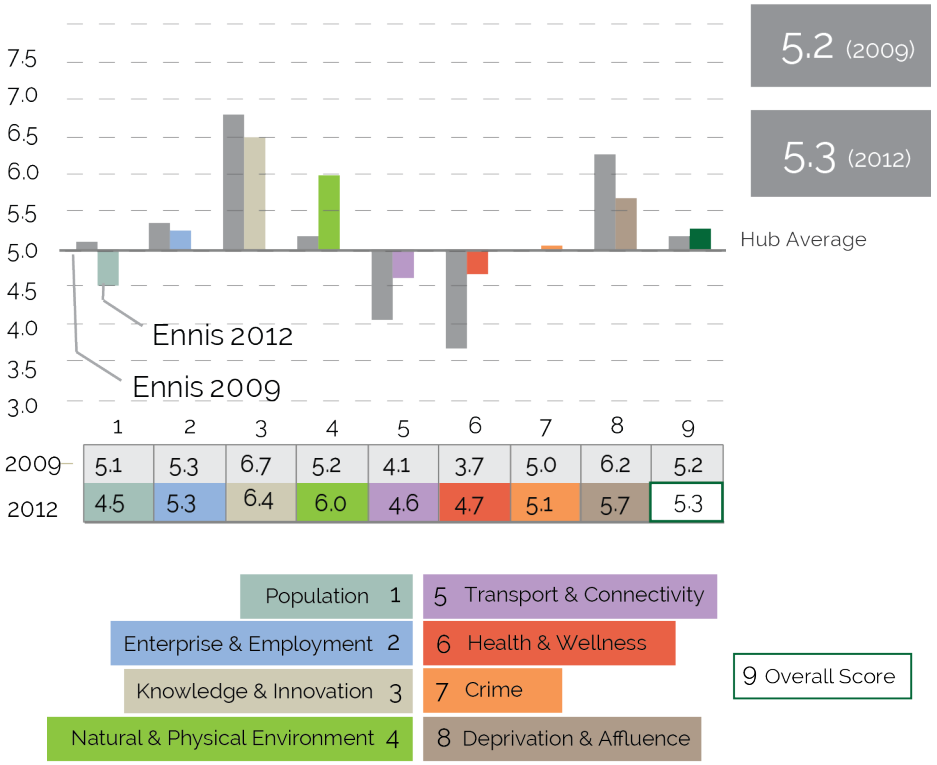



| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 5.2 | 5.0 | 6.8 | 5.2 | 5.2 | 3.7 | 5.0 | 6.5 | 5.3 |
| 2012 | 4.2 | 5.5 | 6.6 | 6.0 | 5.0 | 4.6 | 5.1 | 6.5 | 5.4 |




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 4.8 | 5.1 | 6.6 | 5.2 | 5.3 | 3.7 | 5.0 | 6.4 | 5.3 |
| 2012 | 4.2 | 5.6 | 6.4 | 5.5 | 5.3 | 4.6 | 5.1 | 6.4 | 5.4 |

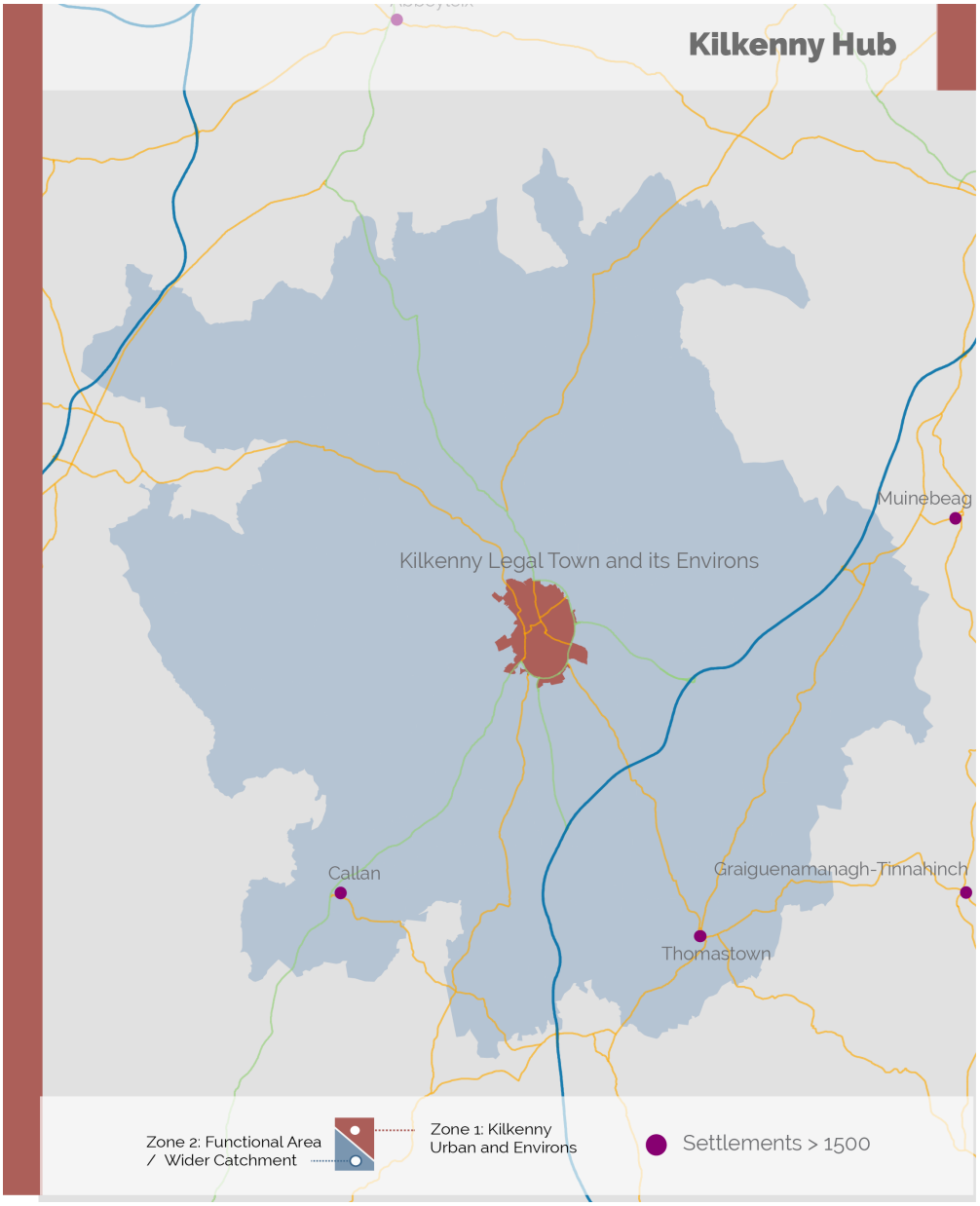
# Ennis Zone 2 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 5.1 | 5.3 | 6.7 | 5.2 | 4.1 | 3.7 | 5.0 | 6.2 | 5.2 |
| 2012 | 4.5 | 5.3 | 6.4 | 6.0 | 4.6 | 4.7 | 5.1 | 5.7 | 5.3 |

## 5.4 Kilkenny Hub

The Kilkenny Hub **Zone 1** area (urban core) and **Zone 2** area (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to the urban core, i.e. **Zone 1**, for work) are shown in the map below.

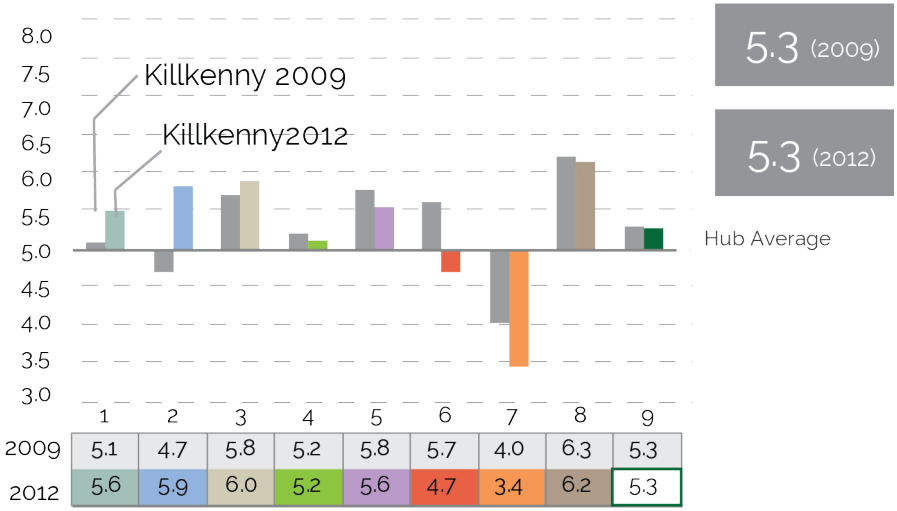


### 5.4.1 Kilkenny Hub: Headline Findings from GHDI 2012

- The population increase experienced in the Kilkenny Hub between 2006 and 2011 is most evident in the urban core (**Zone 1**).
- The dependency rate for this Hub is slightly below the national average for Hubs (51.35%).
- While the number of new firms formed in 2011 has decreased compared with 2006, this decrease has not been as significant as in other Hubs. It was the highest of all the Hubs (8.19/1,000 employees).
- Although significantly higher than in 2006, the 2011 unemployment rate is marginally lower than the national average for Hubs (18.89%).
- The number of people who hold a third level qualification in the Kilkenny Hub labour market has risen quite significantly since 2006 and is the second highest of all the Hubs (28.86%).
- River water quality within the Hub was of good quality status in 2011.
- There has been a notable improvement in drinking water since 2008 as evidenced by the reduction in the number of water sources on the EPA remedial action list (RAL).
- There has been an increase in the household waste recovery rate since 2006.
- Kilkenny performed better than all other Hubs in terms of green transport usage, yet the number of people using public transport, walk or cycle in the Hub has declined since 2006.
- The number of people who live within 30 minutes of their work place is comparatively high, and has improved since 2006 in both **Zone 1** and **Zone 2**.
- Overall, the public transport accessibility rating for the Hub is slightly higher than the average for the Hubs.
- The number of retail outlets per 100 households is on a par with the average for the national Hubs.
- A relatively high proportion of households in the Hub now utilise broadband (60.34%).
- The Year of Potential Life Lost (YPLL) in the Hub is slightly lower (better) than the national average for Hubs.
- The birth weight of babies born in this Hub is in keeping with average birth weights.
- The Hub has a slightly lower than average number of GPs per 1,000 of the population.
- The rate of crime in the Kilkenny Hub was 6 (6.03) per 100 of the population in 2011 and 6 (6.00) in 2006. The Kilkenny Hub has the highest crime rate per 100 of the population out of all the Hubs.
- The Kilkenny Hub score on the Affluence and Deprivation Index has not changed significantly since 2006, with a negligible decrease bringing the score to -0.01.

### 5.4.2 GHDI 2012 Score for Kilkenny Hub

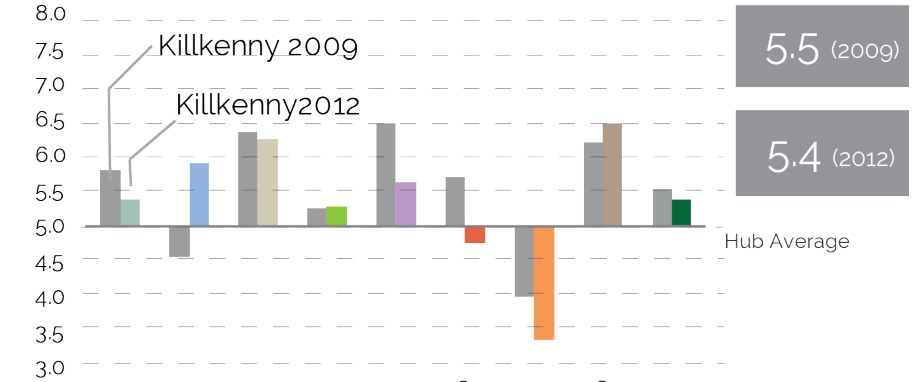
## Kilkenny Index Score (Zone 1 + Zone 2)




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 5.1 | 4.7 | 5.8 | 5.2 | 5.8 | 5.7 | 4.0 | 6.3 | 5.3 |
| 2012 | 5.6 | 5.9 | 6.0 | 5.2 | 5.6 | 4.7 | 3.4 | 6.2 | 5.3 |

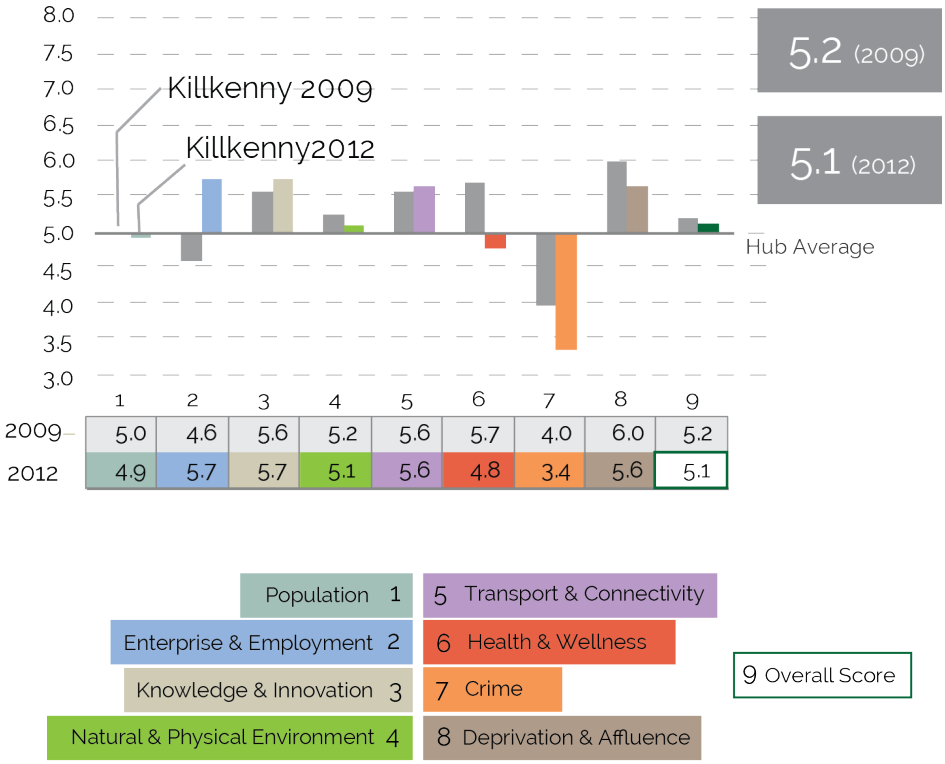
Population 1
Enterprise & Employment 2
Knowledge & Innovation 3
Natural & Physical Environment 4
5 Transport & Connectivity
6 Health & Wellness
7 Crime
8 Deprivation & Affluence
9 Overall Score

## Kilkenny Zone 1 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 5.8 | 4.6 | 6.3 | 5.2 | 6.4 | 5.7 | 4.0 | 6.2 | 5.5 |
| 2012 | 5.4 | 5.9 | 6.2 | 5.3 | 5.6 | 4.8 | 3.4 | 6.5 | 5.4 |

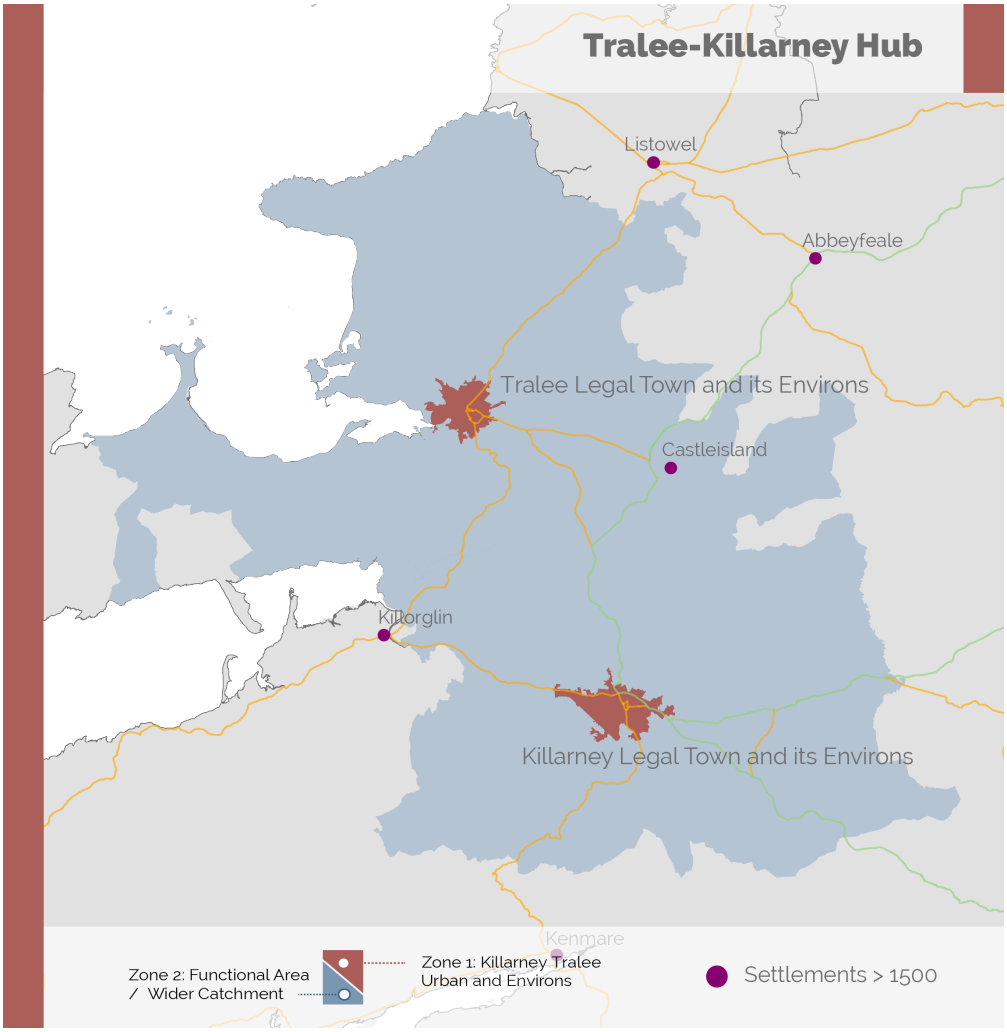
# Kilkenny Zone 2 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 5.0 | 4.6 | 5.6 | 5.2 | 5.6 | 5.7 | 4.0 | 6.0 | 5.2 |
| 2012 | 4.9 | 5.7 | 5.7 | 5.1 | 5.6 | 4.8 | 3.4 | 5.6 | 5.1 |

## 5.5 Tralee-Killarney Hub

The Tralee-Killarney Hub **Zone 1** area (urban core) and **Zone 2** area (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to either urban core, i.e. **Zone 1**, for work) are shown in the map below.

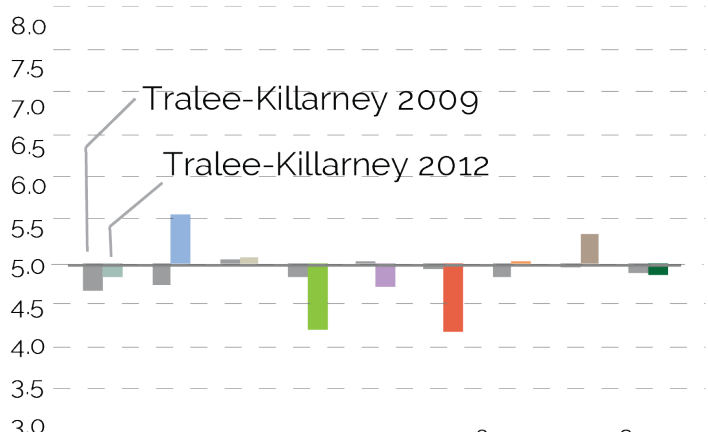


### 5.5.1 Tralee-Killarney Hub: Headline Findings from GHDI 2012

- A comparatively small population increase occurred between 2006 and 2011, with more significant growth taking place in Zone 2 rather than in Zone 1.
- The dependency rate for this Hub is slightly below the national average for Hubs (51.97%).
- There has been a significant decline in the number of new firms formed in 2011 compared with 2006 which has been experienced throughout both Zone 1 and Zone 2 of the Hub.
- Tralee-Killarney has the highest share of services in the national economy of all the Hubs.
- The 2011 unemployment rate is broadly in line with the national average for Hubs rate (19.50%).
- The number of people who hold a third level qualification in the Tralee-Killarney linked Hub labour market has risen quite significantly since 2006 and is marginally higher than the national average for Hubs (26.16%).
- In 2011, river water quality within the Hub was found to be of good quality status.
- The number of water sources listed on the EPA Remedial Action List (RAL) has increased since 2008 (three in 2011, two in 2008).
- The rate of household waste recovery (recycling and biological treated waste) was higher in 2011 than in 2006.
- Green transport usage showed an increase in Zone 2 of 1.38%. Overall, the number of people using green transport has declined since 2006 (marginally lower than the national average for Hubs).
- Figures available for 2011 indicate that 68.04% of people live within 30 minutes of their work place, which is higher than the national average for Hubs of 64.57%.
- Overall, the accessibility rating for the Hub is on a par with the national average for Hubs.
- The number of retail outlets per 100 households is slightly below average (2.93/100).
- The number of households with broadband access has increased substantially since 2006; however, in 2011 it was slightly below the average for the national Hubs (56.63%).
- The Years of Potential Life Lost (YPLL) was higher in 2011 than it was in 2006, and represents the highest (worst) YPLL of all the Hubs.
- The birth weight of babies born in this Hub is in keeping with average birth weights.
- The number of GPs per 1,000 of the population is marginally below the national average for Hubs (0.92 GPs/1,000).
- A small decrease occurred in the number of crimes occurring per 100 of the population in 2011 compared with 2006. The 2011 crime rate is in line with the average crime rate for the Hubs.
- The Tralee-Killarney Hub score on the Affluence and Deprivation Index has improved by a very slight margin since 2006. However, marginal deprivation remains an issue for both Zone 1 and Zone 2 of the Hub.

### 5.5.2 GHDI 2012 Score for Tralee-Killarney Hub

## Tralee-Killarney Index Score (Zone 1 + Zone 2)




4.9 (2009)

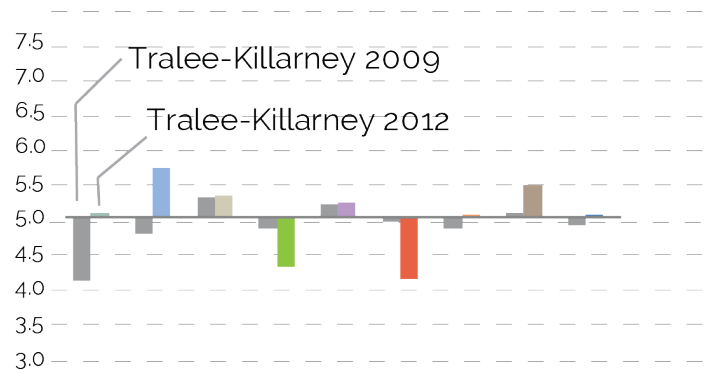
4.9 (2012)

Hub Average

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 4.6 | 4.7 | 5.0 | 4.8 | 5.0 | 4.9 | 4.8 | 4.9 | 4.9 |
| 2012 | 4.8 | 5.6 | 5.1 | 4.2 | 4.7 | 4.1 | 5.0 | 5.4 | 4.9 |

1 Population
2 Enterprise & Employment
3 Knowledge & Innovation
4 Natural & Physical Environment
5 Transport & Connectivity
6 Health & Wellness
7 Crime
8 Deprivation & Affluence
9 Overall Score

## Tralee-Killarney Zone 1 Index Score



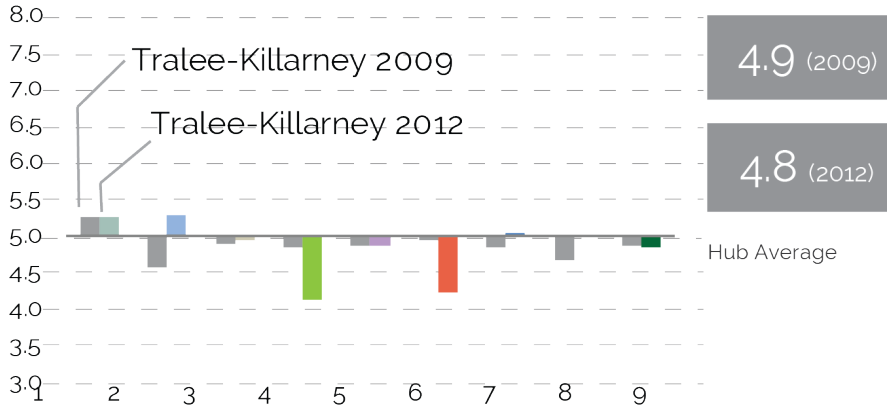

4.9 (2009)

5.0 (2012)

Hub Average

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 4.1 | 4.8 | 5.3 | 4.8 | 5.2 | 4.9 | 4.8 | 5.1 | 4.9 |
| 2012 | 5.0 | 5.7 | 5.3 | 4.3 | 5.2 | 4.1 | 5.0 | 5.4 | 5.0 |

# Tralee-Killarney Zone 2 Index Score

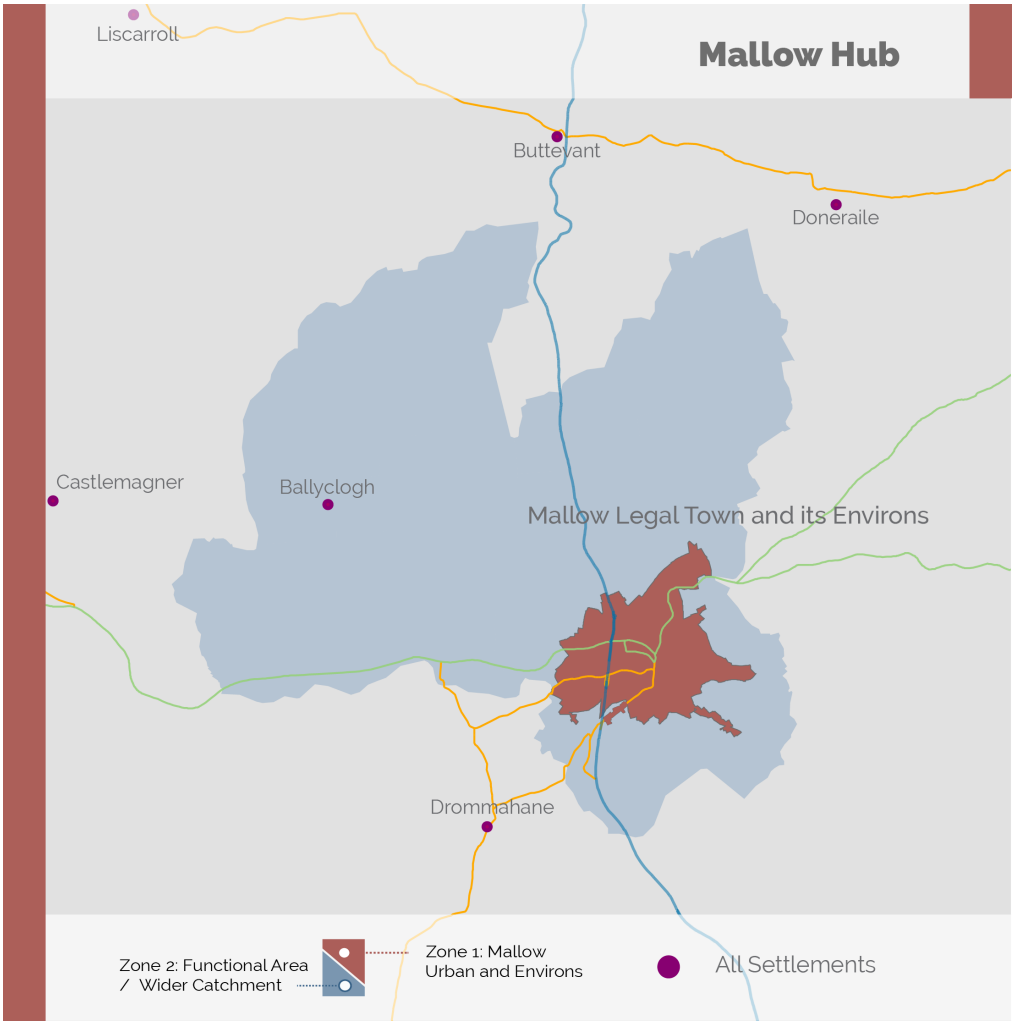



| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 5.3 | 4.6 | 4.9 | 4.8 | 4.8 | 4.9 | 4.8 | 4.7 | 4.9 |
| 2012 | 5.2 | 5.3 | 4.9 | 4.1 | 4.9 | 4.2 | 5.0 | 5.0 | 4.8 |

1 Population
2 Enterprise & Employment
3 Knowledge & Innovation
4 Natural & Physical Environment
5 Transport & Connectivity
6 Health & Wellness
7 Crime
8 Deprivation & Affluence
9 Overall Score

## 5.6 Mallow Hub

The Mallow Hub **Zone 1** area (urban core) and **Zone 2** area (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to the urban core, i.e. **Zone 1**, for work) are shown in the map below.

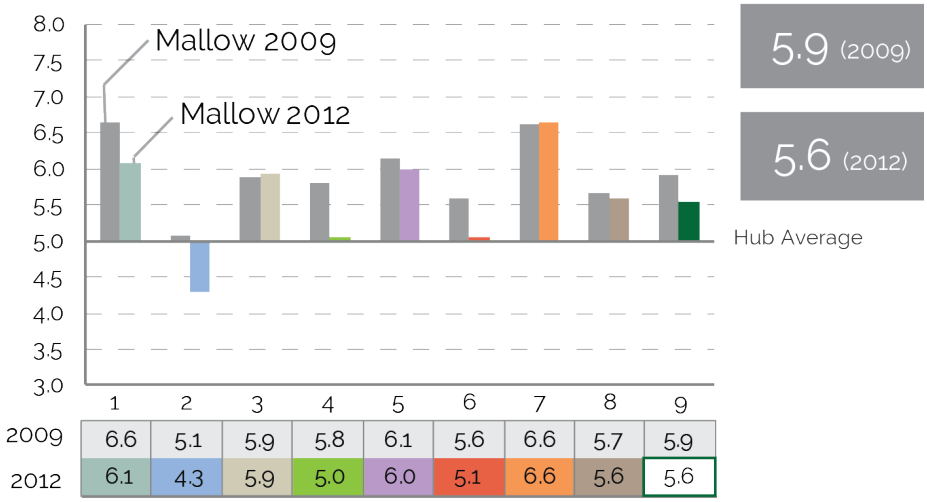


### 5.6.1 Mallow Hub: Headline Findings from GHDI 2012

- The population of **Zone 1** of the Mallow Hub grew quite significantly in the period between 2006 and 2011. A small increase also occurred in **Zone 2**.
- The dependency rate is lower than the national average for Hubs (51.67%).
- The number of new firms formed in 2011 is lower than that of 2006, with the reduction relatively uniform across both **Zone 1** and **Zone 2** and is below the national average for the Hubs.
- The Hub has a comparatively low share of services in the economy.
- The 2011 unemployment rate is broadly in line with the average unemployment rate for the Hubs, and indicates a substantial rise on the 2006 levels. This is particularly evident for **Zone 1** (21.64%) where there has been a significant rise in unemployment since 2006.
- There has been significant progress in the number of people who hold a third level qualification in the Mallow Hub labour market, particularly relating to **Zone 2** of the Hub (28.79%).
- In 2011, river water quality within the Hub was classified as of moderate quality status.
- There were no water sources listed on the 2011 EPA Remedial Action List (RAL) which suggests a high standard of drinking water quality in the Hub.
- Although the level of household waste recovery had fallen in 2011 in comparison with 2006 figures, the recovery rate was higher than the 2011 national average.
- There has been a small reduction in the number of people using public transport, walking or cycling in 2011 in comparison to 2006 (but the rate remains higher than the national average for Hubs).
- A relatively low percentage of people live within 30 minutes of their place of work.
- In terms of accessibility to public transport within the Hubs, Mallow scored highly (the highest score of all the Hubs).
- The Mallow Hub has the second highest ratio of retail outlets per 100 households of the Hubs.
- There has been a significant increase in the number of households with broadband access since 2006 (2011-60.92%).
- The Mallow Hub scored the second lowest (best) of all the Hubs for Years of Potential Life Lost (YPLL) and there has been an improvement since 2006.
- The birth weight of babies born in this Hub is broadly in keeping with average birth weights.
- The number of GPs per 1,000 of the population is broadly in line with the national average for Hubs. **Zone 2** has a higher number of GP's per 1,000 of the population than **Zone 1**.
- A small decrease in the number of crimes occurring per 100 of the population is evident for 2011 compared with 2006 figures.
- Overall, Mallow is marginally deprived based on its score on the Affluence and Deprivation Index (however, this is attributable to **Zone 1** only, **Zone 2** is marginally affluent).

### 5.6.2 GHDI 2012 Score for Mallow Hub

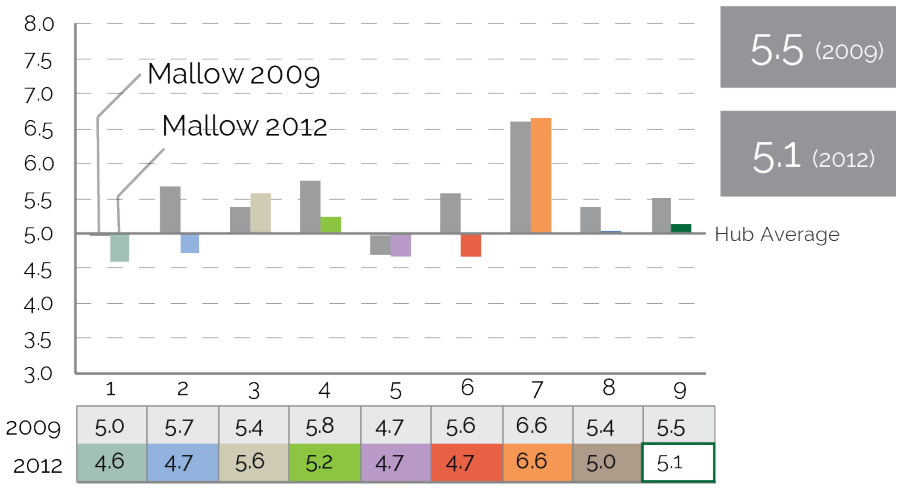
## Mallow Index Score (Zone 1 + Zone 2)




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 6.6 | 5.1 | 5.9 | 5.8 | 6.1 | 5.6 | 6.6 | 5.7 | 5.9 |
| 2012 | 6.1 | 4.3 | 5.9 | 5.0 | 6.0 | 5.1 | 6.6 | 5.6 | 5.6 |

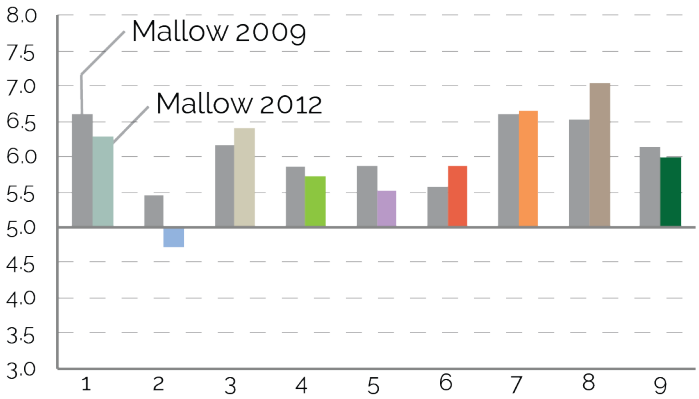
1 Population
2 Enterprise & Employment
3 Knowledge & Innovation
4 Natural & Physical Environment
5 Transport & Connectivity
6 Health & Wellness
7 Crime
8 Deprivation & Affluence
9 Overall Score

## Mallow Zone 1 Index Score




| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 5.0 | 5.7 | 5.4 | 5.8 | 4.7 | 5.6 | 6.6 | 5.4 | 5.5 |
| 2012 | 4.6 | 4.7 | 5.6 | 5.2 | 4.7 | 4.7 | 6.6 | 5.0 | 5.1 |

# Mallow Zone 2 Index Score




6.1 (2009)

6.0 (2012)

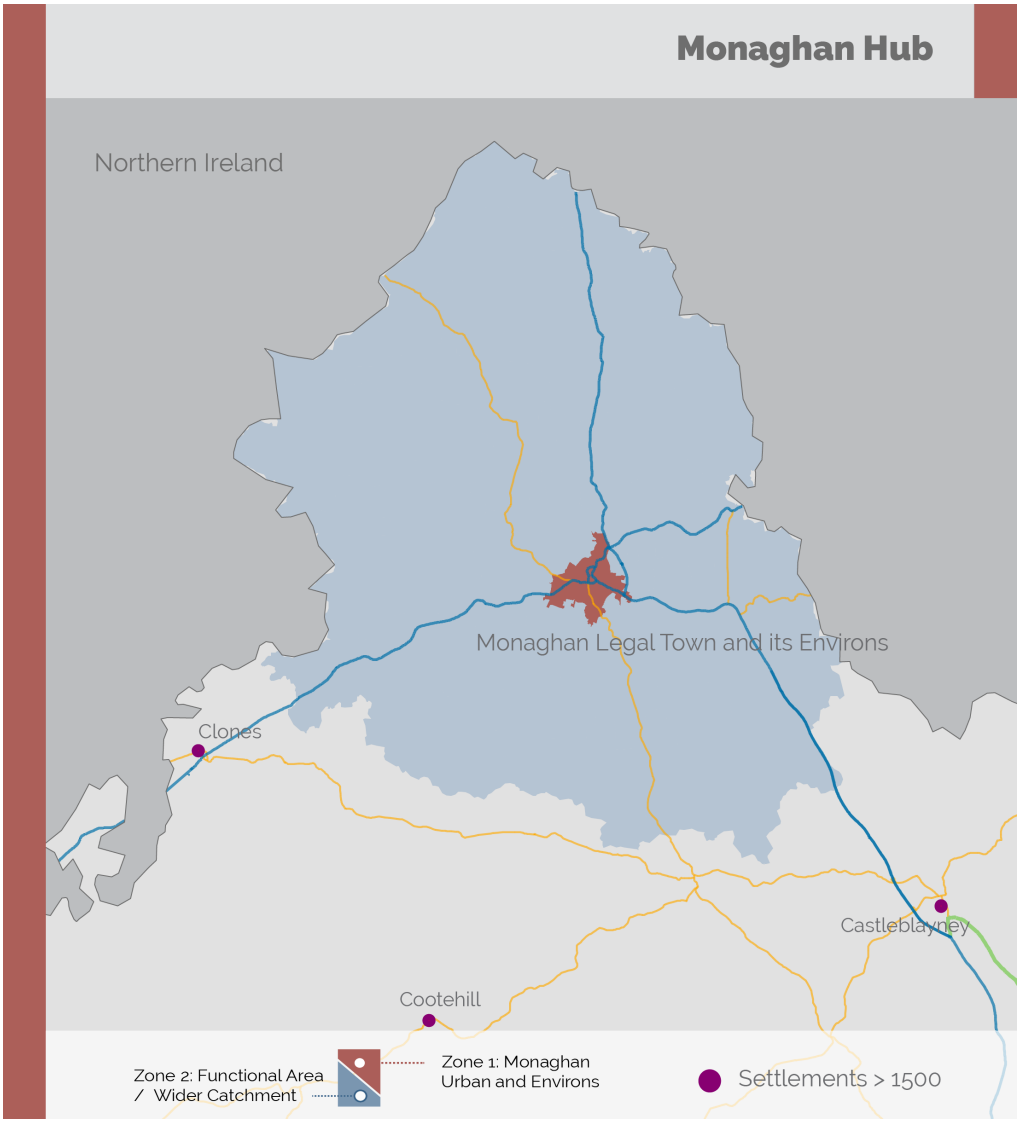
Hub Average

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 6.6 | 5.5 | 6.2 | 5.8 | 5.8 | 5.6 | 6.6 | 6.5 | 6.1 |
| 2012 | 6.3 | 4.7 | 6.4 | 5.7 | 5.5 | 5.9 | 6.6 | 7.0 | 6.0 |

1 Population
2 Enterprise & Employment
3 Knowledge & Innovation
4 Natural & Physical Environment
5 Transport & Connectivity
6 Health & Wellness
7 Crime
8 Deprivation & Affluence
9 Overall Score

## 5.7 Monaghan Hub

The Monaghan Hub **Zone 1** area (urban core) and **Zone 2** area (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to the urban core, i.e. **Zone 1**, for work) are shown in the map below.

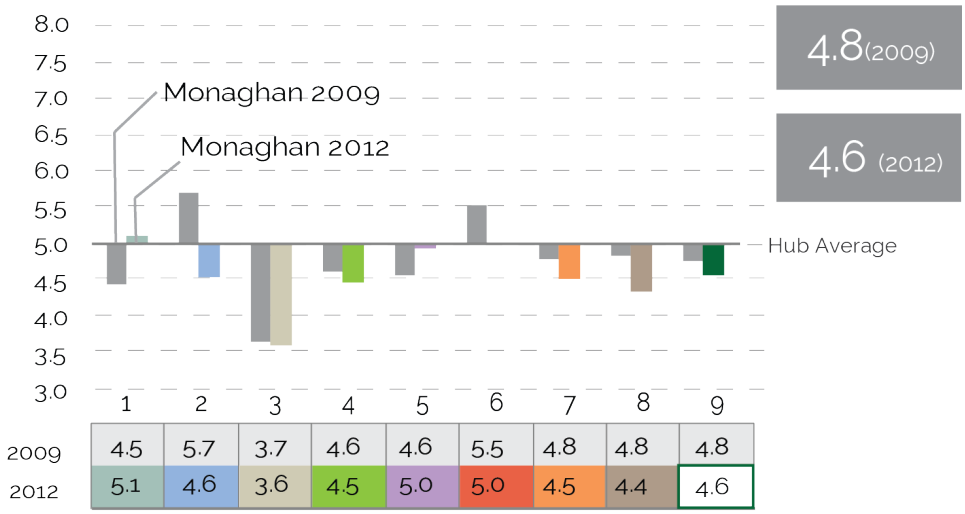


### 5.7.1 Monaghan Hub: Headline Findings from GHDI 2012

- The population of the Monaghan Hub increased (6.89%) between 2006 and 2011, with a more significant increase occurring in Zone 1.
- The dependency rate is broadly in line with the national average for Hubs.
- The number of new firms formed in 2011 is lower than that of 2006, with the reduction relatively uniform across both Zone 1 and Zone 2.
- Comparatively, the Hub has a lower than average share of services in the economy.
- In 2011, the Monaghan Hub had an unemployment rate of 18.97%, which is lower than the national average for Hubs of 20.07%.
- The number of people who hold a third level qualification (21.85%) in the Monaghan Hub labour market has increased since 2006. However, the Hub has the lowest level of third level educational attainment out of all of the Hubs.
- In 2011, river water in the Hub was classified as of moderate quality status.
- Consumable water in the Hub is of a high quality standard. This is based on the fact that no water sources featured on the 2011 EPA Remedial Action List (RAL).
- The quantity of household waste recovered for recycling or biological treatment in 2011 (36.52%) is greater than that recovered in 2006 (but is lower than the national average).
- The number of people using public transport, walking or cycling has declined slightly on 2006 levels, with the most apparent decrease occurring in Zone 1.
- There were fewer people living within 30 minutes of their place of work in 2011 than in 2006.
- The Monaghan Hub has the third lowest rating for public transport accessibility out of all the Hubs.
- Monaghan has the highest number of retail outlets per 100 households of all the Hubs.
- There has been a significant increase in the number of households utilising broadband access since 2006 (2011 - 56.07%).
- The Monaghan Hub has a slightly higher than national average for Hubs Years of Potential Life Lost (YPLL) rate and there has been a minor deterioration in the YPLL since 2006.
- The average birth weight of babies born in this Hub in 2011 was the highest (along with Ballina-Castlebar) of all the national Hubs.
- The number of GPs per 1,000 of the population is the lowest of all the national Hubs.
- There was no real perceptible change in the number of crimes per 100 of the population in 2006 and 2011. The crime rate is slightly higher than average for the national Hubs.
- According to the deprivation and affluence index, Monaghan is marginally more deprived than it was in 2006; this is particularly true in Zone 1.

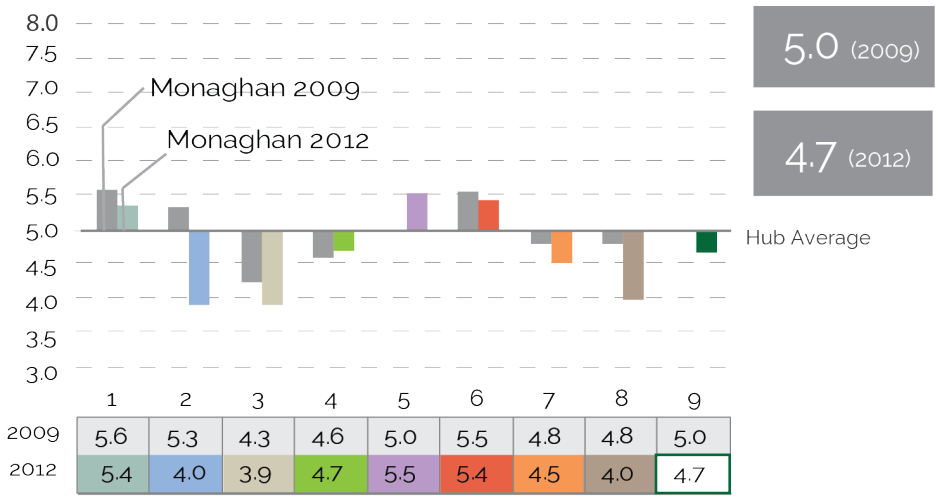
### 5.7.2 GHDI 2012 Score for Monaghan Hub

## Monaghan Index Score (Zone 1 + Zone 2)

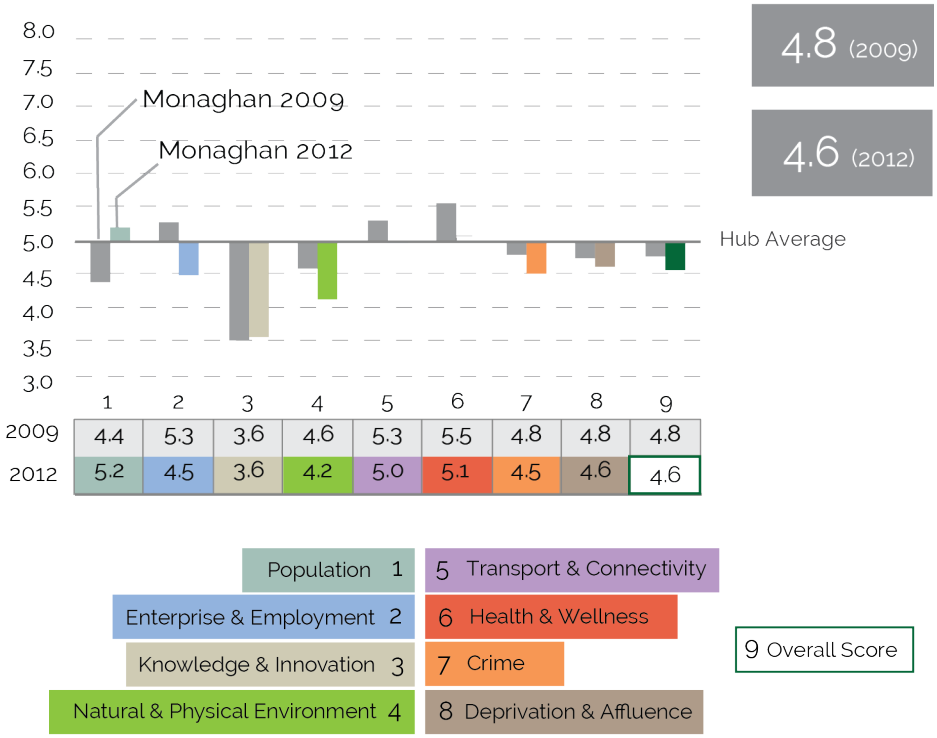



Population 1
Enterprise & Employment 2
Knowledge & Innovation 3
Natural & Physical Environment 4
5 Transport & Connectivity
6 Health & Wellness
7 Crime
8 Deprivation & Affluence
9 Overall Score

## Monaghan Zone 1 Index Score

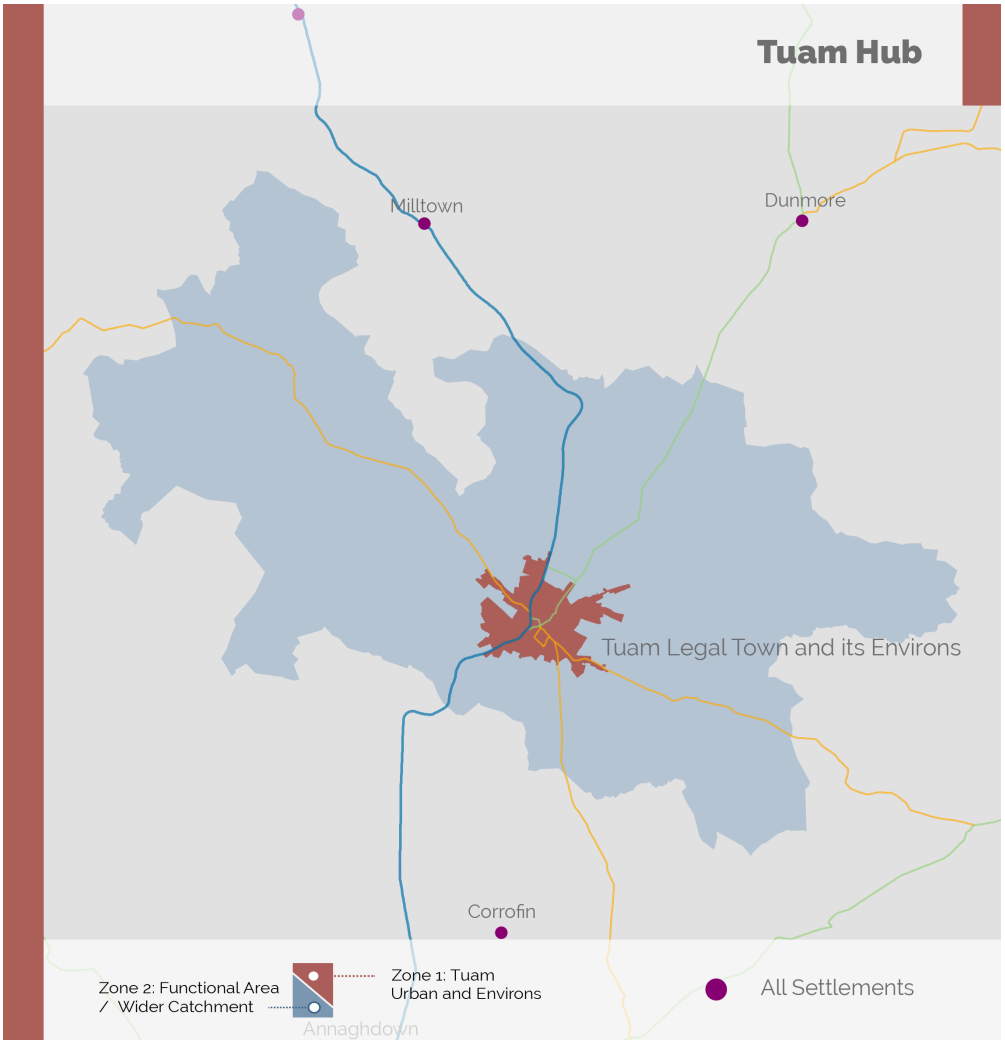


# Monaghan Zone 2 Index Score



## 5.8 Tuam Hub

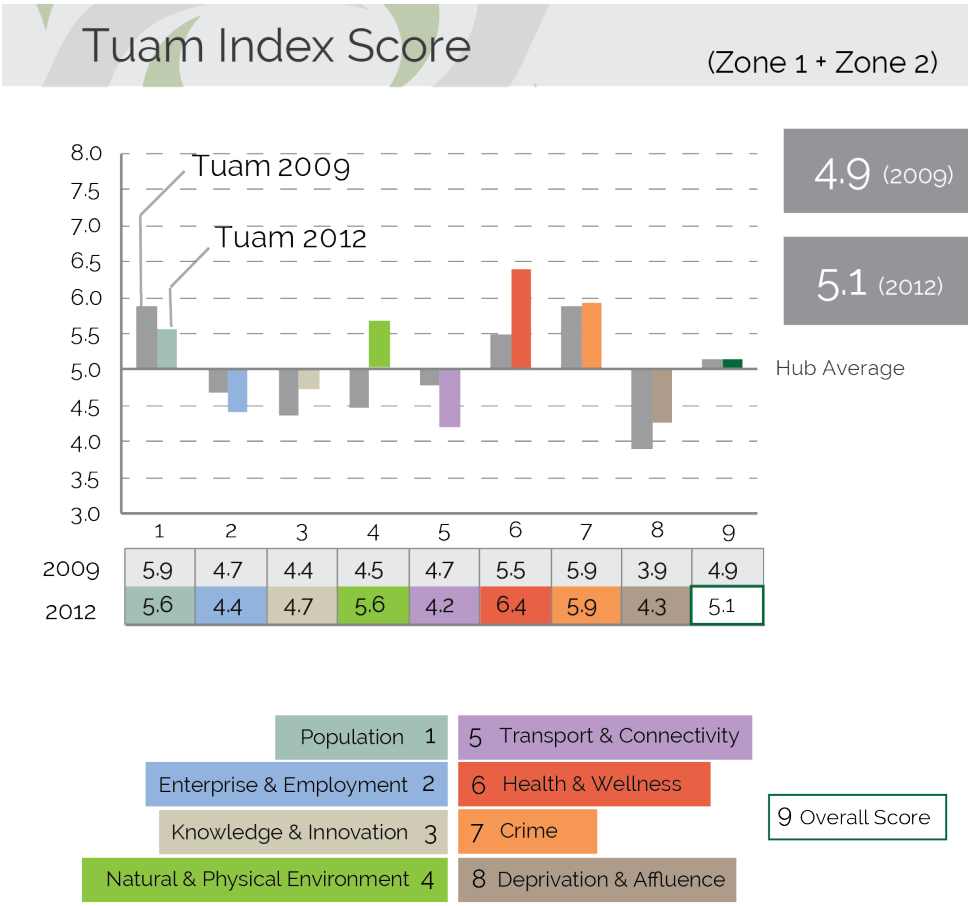
The Tuam Hub **Zone 1** area (urban core) and **Zone 2** area (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to the urban core, i.e. **Zone 1**, for work) are shown in the map below.

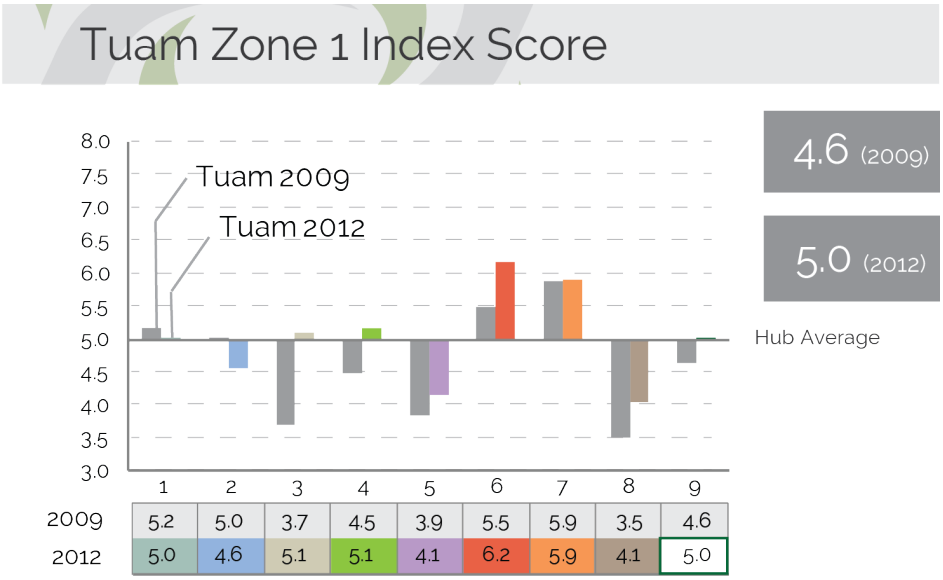


### 5.8.1 Tuam Hub: Headline Findings from GHDI 2012

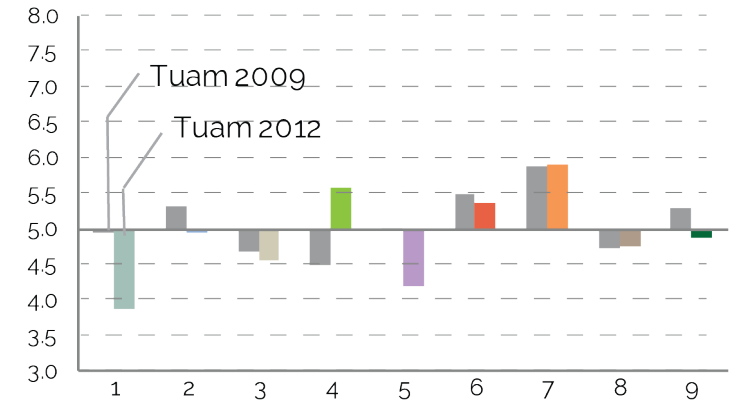
- Tuam experienced a considerable expansion in terms of its population between 2006 and 2011 (12.08%).
- The dependency rate for the Tuam Hub broadly aligns with the national average for Hubs of 52.96%.
- Deterioration in the number of new firms formed in 2011 compared with 2006 is apparent however the Tuam Hub is performing strongly compared to the national average for Hubs.
- Tuam has a relatively low share of services in the economy in comparison with the other Hubs.
- In 2011, the unemployment rate for the Tuam Hub was higher than the national average for Hubs (primarily owing to the high rate of unemployment in **Zone 1**).
- The number of people who hold a third level qualification (25.14%) in the Tuam Hub labour market has increased since 2006 and is broadly in line with the national average for Hubs performance rate for this indicator.
- In 2011, river water was found to be of good quality status.
- There were no water sources listed on the EPA remedial action list (RAL) in 2011, which indicates a high standard of water quality in the Hub.
- The recovery rate (41.97%) for household waste within the Hub was significantly higher in 2011 than it was in 2006 (and is marginally higher than the national average).
- Public transport use, walking and cycling was lower in 2011 than in 2006 (however, the 2011 rate of green transport use is higher than the national average for Hubs).
- There is a decline in the number of people living within 30 minutes of their place of work in 2011 (50.85%) than was the case in 2006, the rate for this indicator is lower than the national average for Hubs.
- The Tuam Hub had one of the lowest ratings for accessibility of all the Hubs.
- The number of retail outlets per 100 households in the Tuam hub is quite low. However, on a positive note, there is a considerably higher retail unit to household unit rate evident for the urban core (**Zone 1**) than **Zone 2**.
- Although the progress made in terms of the number of households with broadband access was evident in 2011, the rate (57.18%) is lower than the national average for Hubs for broadband access.
- The Tuam Hub scored highly in terms of Years of Potential Life Lost (best YPLL of all the Hubs).
- The average birth weight of babies born in this Hub in 2011 was broadly in line with the national average for Hubs.
- The number of GPs per 1,000 of the population is the highest of all the Hubs. However, all GP's are situated within **Zone 1**.
- A small decrease in the crime rate per 100 of the population is notable for 2011 based on 2006 figures.
- According to the Affluence and Deprvation Index, the Tuam Hub is slightly less deprived than it was in 2006.

### 5.8.2 GHDI 2012 Score for Tuam Hub



# Tuam Zone 2 Index Score




5.1 (2009)

4.9 (2012)

Hub Average

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|---|---|---|---|---|---|---|---|---|---|
| 2009 | 4.9 | 5.3 | 4.7 | 4.5 | 5.0 | 5.5 | 5.9 | 4.7 | 5.1 |
| 2012 | 3.9 | 5.0 | 4.6 | 5.6 | 4.1 | 5.4 | 5.9 | 4.8 | 4.9 |

1 Population

2 Enterprise & Employment

3 Knowledge & Innovation

4 Natural & Physical Environment

5 Transport & Connectivity

6 Health & Wellness

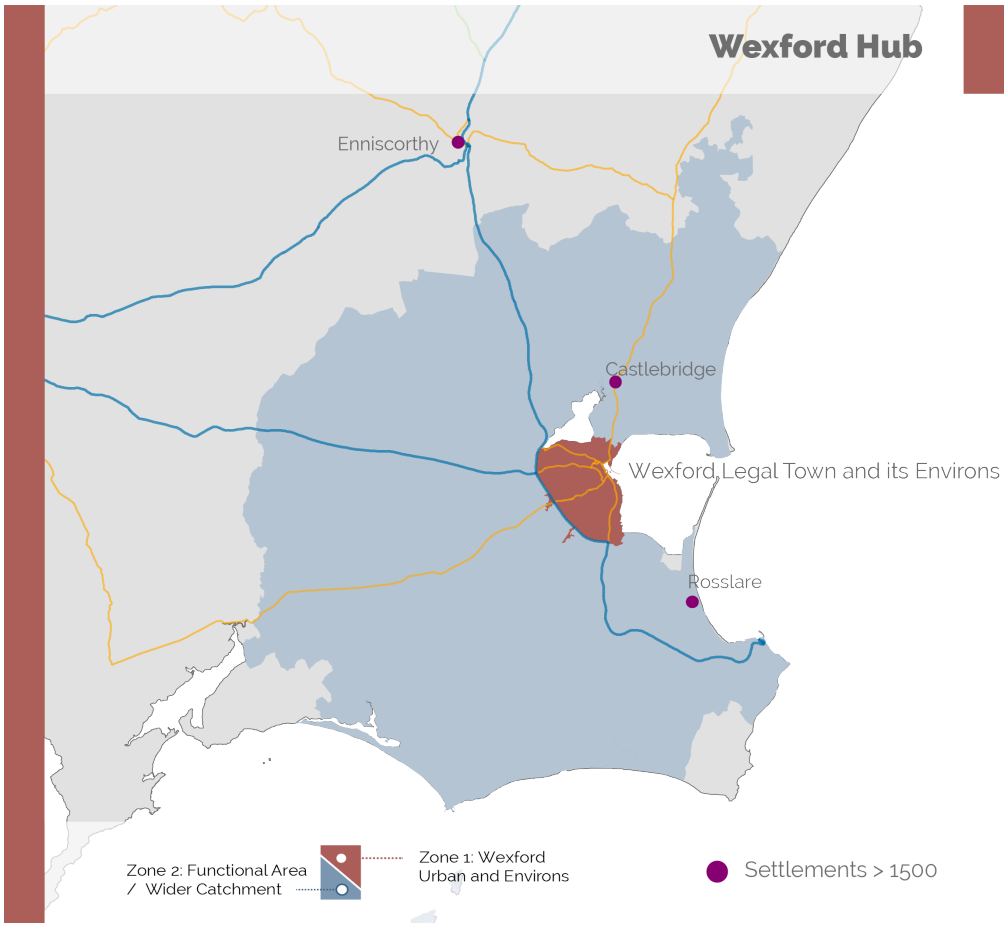
7 Crime

8 Deprivation & Affluence

9 Overall Score

## 5.9 Wexford Hub

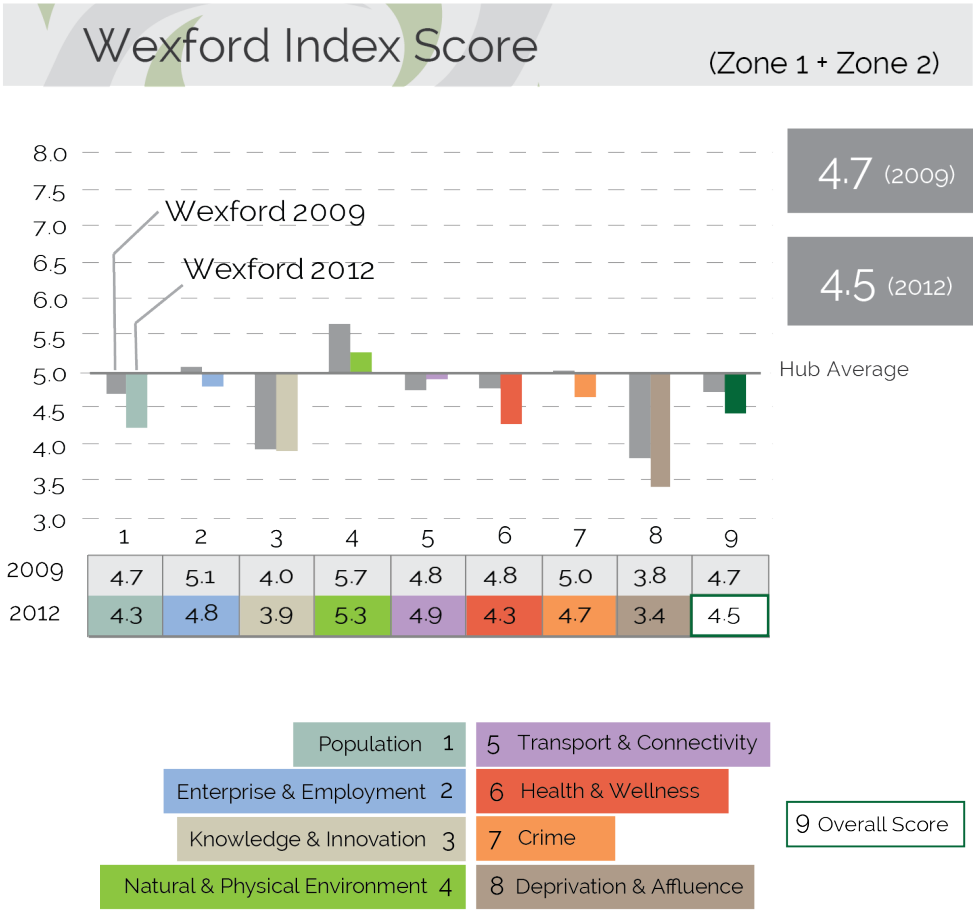
The Wexford Hub **Zone 1** area (urban core) and **Zone 2** area (functional area which comprises of District Electoral Divisions where in excess of 20% of the resident population in employment commute to the urban core, i.e. **Zone 1**, for work) are shown in the map below.

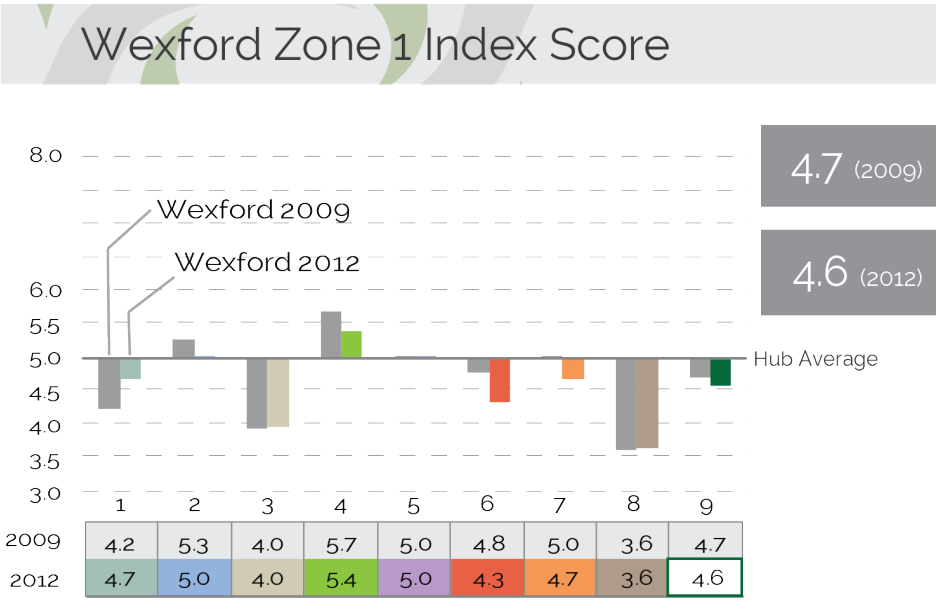


### 5.9.1 Wexford Hub: Headline Findings from GHDI 2012

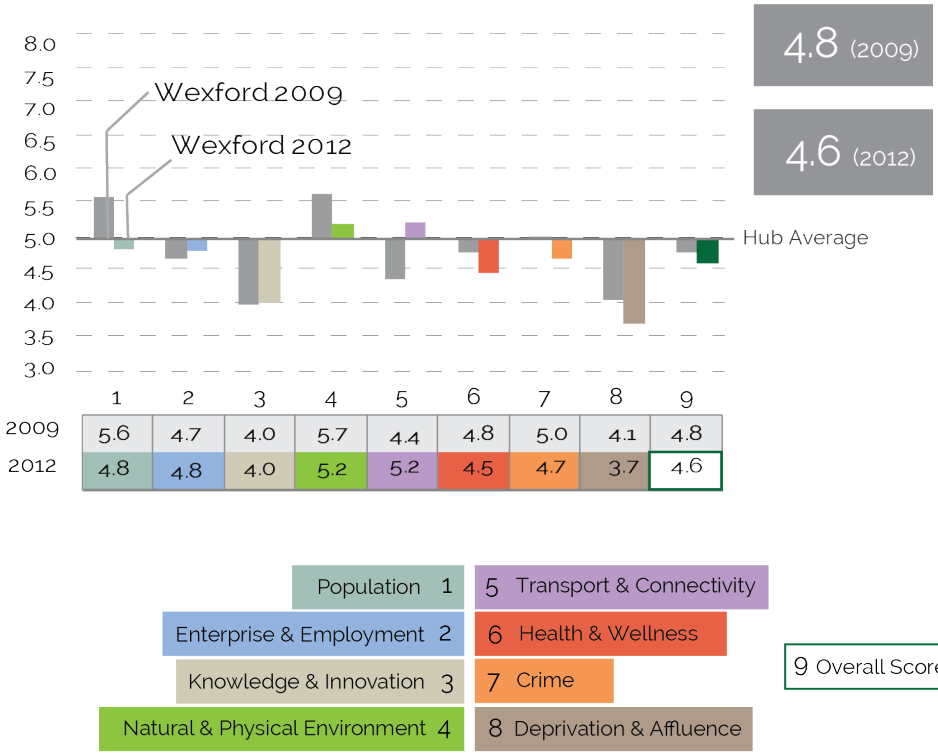
- The population of both Zone 1 and Zone 2 of the Hub increased between 2006 and 2011 with the most significant change apparent for Zone 1.
- The Wexford Hub has the highest dependency rate of all the national Hubs (54.50 %).
- The number of new firms formed has dropped considerably on 2006 levels but maintains a rate that is higher than the national average for Hubs.
- Wexford has a 1.26% share of services in the economy, which is the fourth highest recorded for the Hubs.
- At 22.83%, Wexford had the highest unemployment rate of all the Hubs in 2011.
- While the number of people who hold a third level qualification in the Wexford labour market has increased since 2006, the Hubs performance in this regard is lower than the national average for Hubs and the second lowest of all the Hubs.
- In 2011, river water was of good quality status.
- There were no water sources listed on the EPA remedial action list (RAL) in 2012, which indicates a high standard of water quality in the Hub.
- The recovery rate for household waste within the Hub was significantly higher in 2011 than it was in 2006.
- Public transport use, walking and cycling was lower in 2011 than in 2006 (although the Hub scored higher than average on this).
- For the number of people who live within 30 minutes of their place of work, the Wexford Hub performed the best out of all the Hubs based on 2011 figures.
- Public transport accessibility within the region is reasonably good with a slightly above average score for this indicator.
- Wexford has the lowest number of retail outlets per 100 households of all the Hubs (2.52/100).
- The number of households with broadband access rose significantly by 2011 based on 2006 levels (2011 - 59.17%).
- The 2011 Years of Potential Life Lost (YPLL) is slightly higher (worse) than the 2006 YPLL and is also higher (worse) than the national average for Hubs.
- The average birth weight of babies born in this Hub was the same in 2011 as it was in 2006 and was in keeping with the 2011 national average for Hubs of 3.49kg.
- The number of GPs per 1,000 of the population is below the national average for Hubs.
- There was no perceptible change in the number of crimes per 100 of the population in 2011 compared with 2006.
- According to the Affluence and Deprivation Index, the Wexford Hub is more deprived than it was in 2006 in both Zone 1 and Zone 2 areas. The Wexford Hub has the highest deprivation rating of all the Hubs.

### 5.9.2 GHDI 2012 Score for Wexford Hub



# Wexford Zone 2 Index Score



# Appendix 1 - Steering Committee

| Name | Title | Organisation |
|---|---|---|
| Mr. Gerry Finn | Director | Border, Midland and Western Regional Assembly |
| Mr. Adrian O'Donoghue | Policy & Research Officer | |
| Mr. Stephen Blair | Director | Southern and Eastern Regional Assembly |
| Ms. Derville Brennan | Research & Communications Officer | |
| Mr. Niall Cussen | Senior Planning Adviser | Department of Environment, Community and Local Government |
| Mr. Michael Walsh | Waterford City Manager | County and City Managers Association |
| Dr. Barry Vaughan | Policy Analyst | Department of An Taoiseach |
| Mr. Rory O'Rua | Assistant Principal | Department of Public Expenditure and Reform |

# Appendix 2 - Stakeholder Engagement

## CCMA and RPGs GHDI Stakeholder Consultation Workshop

Dublin City Council, Woodquay, Dublin 8. February 20th 2013

| Name | Title | Organisation |
|---|---|---|
| » Padraig Maguire | RPG Officer | Border Regional Authority |
| » Ann Bogan | Senior Planner | Cork City Council |
| » Turlough King | Executive Planner | Dublin Regional Authority |
| » Owen Keegan | County Manager | DLR County Council |
| » David Irvine | Senior Planner | DLR County Council |
| » Joe O'Neill | City Manager | Galway City Manager |
| » Paul Foley | Senior Executive Officer | Limerick City and County Council |
| » Joan Martin | Louth County Manager | Louth County Council |
| » Pat Gallagher | Senior Planner | Meath County Council |
| » Aoife Moore | RPG Officer | Midlands Regional Authority |
| » John Bradley | RPG Officer | Mid-West Regional Authority |
| » Gavin Daly | ESPON National Contact Point | NIRSA/ESPON |
| » Justin Gleeson | AIRO Project Manager | NIRSA/AIRO |
| » Brian Beck | Senior Planner | North Tipperary County Council |
| » Declan Kirrane | Director of Services | Offaly County Council |
| » James Lavin | RPG Officer | South-East Regional Authority |
| » Bryan Riney | PRG Officer | South-West Regional Authority |
| » Michael Walsh | City Manager | Waterford City Council |
| » Teresa O'Reilly, | RPG Officer | West Regional Authority |
| » **Gerry Finn** | **Director** | **BMW Regional Assembly** |
| » **Adrian O'Donoghue** | **Policy & Research Officer** | **BMW Regional Assembly** |
| » **Stephen Blair** | **Director** | **Southern and Eastern Regional Assembly** |
| » **Derville Brennan** | **Research and Communications Officer** | **Southern and Eastern Regional Assembly** |
| » **Niall Cussen** | **Senior Adviser** | **Department of Environment,** |
| » **William Hynes** | **Director** | **Future Analytics Consulting** |
| » **Stephen Purcell** | **Senior Associate** | **Future Analytics Consulting** |
| » **James Sweeney** | **Planning Consultant** | **Future Analytics Consulting** |
| » **John O'Mahony** | **Associate Director** | **Behaviours and Attitudes** |

# S&E Region GHDI 2012 Stakeholder Consultation Workshop

Assembly House, O'Connell Street Waterford. March 20th 2013

| Name | Title | Organisation |
|---|---|---|
| » Steve MacFeely | Assistant Director General | Central Statistics Office |
| » Gerard Dollard | Director of Services | Clare County Council |
| » Siobhan Bradley | Policy and Research Manager | Cork Chamber of Commerce |
| » Ann Bogan | Senior Planner | Cork City Council |
| » Andrew Hind | Senior Planner | Cork County Council |
| » Walter Foley | Economic Development Officer | Dublin City Council |
| » Colm McCoy | RPG Officer | Dublin Regional Authority |
| » Jim Conway | Director | Dublin Regional Authority |
| » Gary Breen | Head of Operations South-East | Fáilte Ireland |
| » Maria Ginnity | Head of Enterprise Policy | Forfás |
| » Michael McMahon | Director of Services Planning | Kerry County Council |
| » Caitriona O'Sullivan | Executive Planner | Kilkenny County Council |
| » Patrick Gallagher | Senior Planner | Meath County Council |
| » John Bradley | Senior Executive Planner | Mid-West Regional Authority |
| » Liam Conneally | Director | Mid-West Regional Authority |
| » Tom Byrne | Director | South-East Regional Authority |
| » John Forde | Director | South-West Regional Authority |
| » Conall MacAongusa | Director | Transport & Innovation |
| » William Brady | Lecturer | University College Cork |
| » Jonathan Hall | Lecturer | University College Cork |
| » Kathleen Fitzgerald | Board Member | Waterford Chamber of Commerce |
| » Kieran Walsh | Board Member | Waterford Chamber of Commerce |
| » Fearghal Reidy | Economic Development Officer | Waterford County Council |
| » Diarmuid Houston | Senior Planner | Wexford County Council |
| » **Stephen Blair** | **Director** | **Southern & Eastern Regional Assembly** |
| » **Derville Brennan** | **Research & Communications Officer** | **Southern & Eastern Regional Assembly** |
| » **Adrian O'Donoghue** | **Policy and Research Officer** | **BMW Regional Assembly** |
| » **Stephen Purcell** | **Senior Associate** | **Future Analytics Consulting** |
| » **William Hynes** | **Director** | **Future Analytics Consulting** |
| » **John O'Mahony** | **Associate Director** | **Behaviours & Attitudes** |

## BMW Regional GHDI 2012 Stakeholder Consultation Workshop (Ballina/Castlebar, Galway, Midland, Sligo and Tuam)

BMW Regional Assembly, Ballaghaderreen, Co. Roscommon. March 21st 2013

| Name | Title | Organisation |
|---|---|---|
| » Michael Brougham | Midlands Regional Manager | Enterprise Ireland |
| » Barry Egan | West Regional Manager | Enterprise Ireland |
| » Brian Barrett | Senior Executive Officer | Galway City Council |
| » Liam Hanrahan | Administrative Officer | Galway City Council |
| » Liam Gavin | Senior Engineer | Galway County Council |
| » Catherina Blewitt | Regional Manager, West | IDA |
| » John Nugent | Regional Manager, North West | IDA |
| » Joe Gilmore | CEO | Knock Airport |
| » Paul Benson | Ballina Town Manager | Mayo County Council |
| » Sandra Ganly | Director | MetricIreland |
| » Dominic Doheny | Former President | Midland Gateway Chamber |
| » Ruth McNally | Director | Midland Regional Authority |
| » Sarah Morgan | Policy and Research Officer | Midland Regional Authority |
| » Aoife Moore | RPG Officer | Midland Regional Authority |
| » Frank Moylan | Senior Planner | Sligo County Council |
| » Teresa O'Reilly | RPG Officer | West Regional Authority |
| » Deirdre Frost | Policy Analyst | Western Development Commission |
| **» Gerry Finn** | **Director** | **BMW Regional Assembly** |
| **» Adrian O'Donoghue** | **Policy & Research Officer** | **BMW Regional Assembly** |
| **» William Hynes** | **Director** | **Future Analytics Consulting** |
| **» Stephen Purcell** | **Senior Associate** | **Future Analytics Consulting** |
| **» John O'Mahony** | **Associate Director** | **Behaviours and Attitudes** |

## BMW Region GHDI 2012 Stakeholder Consultation Workshop (Cavan/Dundalk/Letterkenny/Monaghan)

Monaghan County Council Chamber, M:TEK Building, Monaghan March 27th 2013

| Name | Title | Organisation |
|---|---|---|
| » Padraig Maguire | RPG Officer | Border Regional Authority |
| » Ger Finn | Director of Services | Cavan County Council |
| » Denis Kelly | Senior Executive Planner | Donegal County Council |
| » Lorretta McNicholas | Research and Policy Manager | Donegal County Council |
| » Paddy Matthews | Vice President | Dundalk Chamber of Commerce |
| » Deirdre Craven | Regional Executive, NE | IDA |
| » Joan Martin | County Manager | Louth County Council |
| » David Storey | Senior Executive Officer | Louth County Council |
| » Toirleach Gourley | Senior Executive Planner | Monaghan County Council |
| » Jonathan Condell | Acting Town Engineer | Monaghan County Council |
| » Helen Hughes | Assistant Planner | Monaghan County Council |
| » Stiofán O Cualáin | CEO | Údarás na Gaeltachta |
| **» Gerry Finn** | **Director** | **BMW Regional Assembly** |
| **» Adrian O'Donoghue** | **Policy & Research Officer** | **BMW Regional Assembly** |
| **» Derville Brennan** | **Research & Communications Officer** | **Southern & Eastern Regional Assembly** |

# Notes

# Notes

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SOUTHERN & EASTERN Regional Assembly
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Ireland's EU Structural Funds Programmes 2007 - 2013

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Comhshaol, Pobal agus Rialtas Áitiúil
Environment, Community and Local Government


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FutureAnalytics + B&A BEHAVIOUR & ATTITUDES