Gateways | Hubs
Development Index 2012
A Review of Socio-Economic Performance

DUNDALK GATEWAY Report

Border, Midland & Western Regional Assembly
Southern & Eastern Regional Assembly
May 2013
This report is one in a series of nine assessing the socio-economic performance of individual Gateways 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. It builds upon the initial study using previously established domains and constituent indicators (or suitable alternatives where necessary and appropriate), as well as 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.

Each report presents the updated findings for the relevant Gateway (a Hubs report is also available) using the latest available datasets in 2012, in the form of an Index, based upon the evaluation of all of the Gateways and Hubs within a series of domains and indicators. 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. 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 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. This is set out in the series of reports. In addition, the findings of a comprehensive perception survey complement the detailed domain analysis.

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 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 catchment or functional area, where in excess of 20% of the residents in employment commutes to the urban core (Zone 1) to work. The Zone 2 areas may extend beyond the administrative boundaries of each Gateway 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 of the Gateways. Accordingly, the population findings within Gateway reports should not be directly compared with Regional Planning Guidelines (RPG) population targets (as set out within the RPGs and development plans).

2 Reports have been compiled for each of the nine Gateways, with a single report to include all of the Hubs, and a summary Gateway and Hubs Development Index Report
3 A new domain, ‘Crime’ replaces ‘Social Facilities and Networks’ as a measure of human capital. The 2009 GDI 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.
The CSO derived boundaries of cities/towns (Zone 1) will not always capture the full extent of the influence of the Gateway/Hub as a number of large employment nodes are located outside of the defined 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.

It should be noted that the remit and scope of this report 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 reports are the outputs to a study which 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 Regional Assembly and the Southern and Eastern Regional Assembly by Future Analytics Consulting, in conjunction with Behaviour and Attitudes. A steering committee, consisting of representatives from the following bodies guided the overall study.

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 those who attended is set out in Appendix 2). 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.
Table of Contents
The Dundalk Gateway

1.0 Introduction 1
1.1 Gateway Context 1
1.2 Use of POWSCAR Data 4
1.3 Use of GeoDirectory Data 5

2.0 Policy Context 6
2.1 The Importance of Policy for Balanced and Sustainable Regional Development 6
2.2 Spatial Policy Landscape 7
2.3 Resourcing Gateway Development 11
2.4 Emerging Policy Landscape 12
2.5 The Importance of the Gateways and Hubs Development Index to Inform Policy 13

3.0 Dundalk Gateway Development Index 15
3.1 Individual Domain Analysis 15
3.2 Population 16
3.3 Enterprise and Employment 21
3.4 Knowledge and Innovation 24
3.5 Natural and Physical Environment 27
3.6 Transport and Connectivity 30
3.7 Health and Wellness 35
3.8 Crime 38
3.9 Affluence and Deprivation 40

4.0 Dundalk Gateway Perception Survey 42
4.1 Introduction 42
4.2 Findings of Perception Survey 42

5.0 GDI 2009 Versus GHDI 2012 44
5.1 GDI 2009 and GHDI 2012: Indices Scores 44

Appendix 1 - Steering Committee
Appendix 2 - Stakeholder Engagement
Appendix 3 - Perception Survey Summary Findings
1.0 Introduction

1.1 Gateway Context

The town of Dundalk is located within the northern part of County Louth, close to the border between the Republic of Ireland and Northern Ireland. It is the designated county town of Louth, and along with the town of Drogheda, to the South, is one of the primary urban centres of the North East of the Country and the seventh largest population centre in the state. The town also located within the Dublin-Belfast corridor, an important economic and infrastructural link between the two primary population centres within the island of Ireland.

Among the many strengths of the Dundalk Gateway, is the presence and influence of the Dundalk Institute of Technology (DKIT), which is the primary third level education institution in the North East (4,660 students enrolled in 2011), specialising in areas such as Business, Engineering and Health and Science services, and is ideally placed to provide graduates in these disciplines to the businesses of the area. The Gateway also enjoys strong transport links to Dublin and Belfast. In addition, the presence of a port within the town, as well as in Greenore, provide important export links. Dundalk is also located strategically within approximately forty-five minutes of Dublin Airport by motorway.

Dundalk has traditionally been recognised as a manufacturing town, and this sector continues to play an important part in the local economy, with the emphasis switching away from the traditional industrial core areas towards the high tech and high value added sectors. Notable achievements in terms of attracting Foreign Direct Investment to the region include the 100 jobs created at Prometric in 2011, a U.S company providing technology enabled testing and assessment solutions, PayPal’s International Operations Centre which is expected to create 1,000 jobs by 2015, and most recently the announcement by eBay that 450 new jobs are to be created at the US online auction company’s Dundalk facility.
The position of Dundalk, close to the border with Northern Ireland, has been an important factor in how the town has developed over the past number of decades. The economy of the Dundalk Gateway has been heavily influenced by the presence of the border, and this influence continues to this day. Cross-border commuting is common in the area, with commuters travelling in both directions for work. The relaxation of border controls, and the increasing influence of cross-border planning, in keeping with the ideals of the ESDP⁴, is anticipated to contribute to a more integrated approach in the development of towns located on or near the border. Cross-border cooperation in the area of spatial planning is reinforced by the compatibility of the National Spatial Strategy 2002-2020 within the Republic of Ireland and with its Northern Irish equivalent, the Regional Development Strategy 2035; this element of cross-border cooperation is seen as an area that will be of increasing importance in the coming years.

⁴ European Spatial Development Perspective (1999)

» 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.
In the 2009 Gateway Development Index (GDI), Dundalk was found to be performing below average in comparison with other Gateways, with an overall GDI score attained by Dundalk in the 2009 GDI report of 4.5. However, the Gateway did produce above average performances within a number of domains, including those of the Natural and Physical Environment and Transport and Connectivity. In 2012, the GHDI score for Dundalk was 4.6, and this indicates that there have been some improvements over the intervening period.

1.1.1 Cross-border context

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. The map below indicates the strength of this relationship, and shows the share of the County Louth work force that commutes to Newry City (in 2011). At its most significant, 18% of the Drummullagh work force commutes to Newry City (55 of 303 people). Ravensdale records the second highest percentage, at 6% where 18 of 296 people commute cross-border to Newry City. Potential cross-border solutions to enhancing economic, social and cultural challenges should continue to be determined, in order to underpin an integrated spatial planning and development framework which can enhance the cross-border relationship. There is an opportunity to continue to harness the warm relations and goodwill between the two jurisdictions to enhance the border towns and cities, creating dynamic, diverse and vibrant locations that attract a critical mass of people to live, work and visit.

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. The score is labelled 2009 for linkage to the GDI 2009 but the values are derived from the 2006 datasets as described in the preceding footnote. The GDI can be accessed at: http://www.bmwassembly.ie/publications/other_reports/BMW_GDI_Report.pdf
1.2 Use of POWSCAR Data

The boundaries of the Dundalk Gateway have been defined using the 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 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 urban core for work. The use of POWSCAR data facilitates an understanding of the functional area of the Gateway, 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 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.
1.3 Use of GeoDirectory Data

GeoDirectory 2012 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 2012 (used under licence), provides a snapshot for a particular point in time (Q1 2012). The GeoDirectory 2012 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).

7 The Q1 2012 version of GeoDirectory 2012 should be 'frozen' such that it can be considered in any future review and update of the Gateways and Hubs Development Index.
2.0 Policy Context

2.1 The Importance of Policy for Balanced and Sustainable Regional Development

It is important to establish and review spatial and socio-economic policy and guidance frameworks which have had a bearing on the development and performance of the Gateways and Hubs since their roles were established in the National Spatial Strategy 2002-2020 (NSS)\(^8\) to date. Given that a range of strategic national, regional and local-level policies have influenced the performance of these designated Gateways and Hubs, understanding their effects, both positive and negative is seen as an important step in informing the future direction of regional policy in Ireland.

Nationally, the role of Gateways is to act as strategically placed engines of growth to enable every part of 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 provide national and regional scale social and economic infrastructure and support services. At a regional level, Gateways can guide more balanced regional development and inform capital investment priorities. They facilitate different places in harnessing their potential and provide a framework for coordinating local planning (for example, alignment of population targets with Gateways objectives, etc), strengthening the relationship between urban and rural areas, and promoting sustainable forms of development. The Gateways, supported by nine designated Hubs, have been the main drivers of the regional and national economy, albeit to different extents.

In terms of the Dundalk Gateway, the NSS envisaged that the Gateway will support the wider border area and along the Dublin-Belfast corridor and underpin cross-border co-operation, particularly within neighbouring Newry. A key objective for the Gateway is to develop economic and transport links between Dundalk and towns in Northern Ireland, in particular Newry, which would be of sufficient capacity to offer a scale of development and critical mass to drive development throughout the eastern corridor. The role of Drogheda, as a primary development centre in the Greater Dublin Area, is also highlighted in terms of its importance to the Louth and East Meath areas\(^9\).

The 2006 report entitled ’Implementing the NSS: Gateway Investment Priorities Study’\(^10\), set out a series of goals for Dundalk to attain; these were divided into short and longer term objectives, with a three to five year timeframe envisaged for the short term objectives. Although some progress has been made on these, many objectives were not implemented, monitored or evaluated. There are many reasons for this, not least the economic downturn, cuts to resources, and a lack of co-ordination and joined up thinking by stakeholders.

---


2.2 Spatial Policy Landscape

**National Spatial Strategy 2002-2020**

The National Spatial Strategy (NSS) 2002-2020 was created as the principal national strategic planning framework within Ireland\(^\text{11}\). As outlined above, Dundalk was designated one of nine Gateways, each of which is intended to develop as the primary driver of sustainable economic and spatial development within their region. This has allowed Dundalk to become the primary focus for development in the north east region. Up until this point, the Gateway had seen growth in terms of its economy, available facilities and infrastructure linkages, while the Gateway population has also expanded. This growth and expansion was supported by a series of government-funded investment initiatives, such as the National Development Plans and Transport 21, which have provided important guidance on where specific infrastructure should be prioritised as well as providing the required funding mechanisms.

The NSS Update and Outlook Report, published in 2010, acknowledged that despite the attainment of a certain level of success, specifically in the area of infrastructure provision and compliance with the RPGs, a number of issues and challenges to the achievement of the wider NSS objectives remain. The most notable of these relate to settlement patterns and the way in which much of the development which took place in recent years did so in an unsustainable manner, leading to a high level of car dependence and the decline of many urban core areas.

One past policy which had a significant spatial dimension was decentralisation. This was a programme to redistribute entire government departments and state agencies with large numbers of civil and public servants from Dublin to various parts of the country. The distribution did not, however, focus exclusively on relocating departments/agencies to the Gateways and Hubs, Ireland’s designated engines for growth. Of those departments/agencies that were relocated, 33%\(^\text{12}\) were relocated to the designated Gateways and Hubs, thereby diverting a proportion of development beyond those areas. Furthermore, large shares of future phases of decentralisation were earmarked to move to towns which did not feature in the NSS.

In addition to strategic level policy and investment mechanisms, there have also been regional and locally focused policies and strategies which have sought to enhance the strategic vision of the NSS at a lower level, providing guidance to the relevant authorities on how and where this development should take place. Amongst the most notable of these are Regional Operational Programmes\(^\text{13}\) for the Border, Midland and Western (BMW), RPGs for the Border Region, and the relevant County Development Plans and Local Area Plans. Many of these are statutory in nature, and are subject to review and replacement within statutorily defined periods, and the manner in which they have sought to fulfil the goals of the NSS has also evolved. In this way, resulting policies have been influenced in their development by an extensive series of factors.

---

11 Under the guidance and funding initiatives of the original National Development Plan 2000-2006.
13 Funding was provided from various EU funds for the 2000-2006 programme and from the European Regional Development Funds (ERDF) for the 2007-2013 programming period.
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 inform Ireland’s approach to regional policy14.

Regional Planning Guidelines
The Regional Planning Guidelines (RPGs)15 are an important element in controlling how the goals of the NSS are achieved. Unlike the NDP, the RPGs have no financial instruments (although they do include a chapter related to regional economic strategies), but instead exert their influence through the establishment of an integrated regional planning framework by ensuring that city and county councils fulfil their obligation that all City and County Development Plans must be consistent with the goals of the RPGs, and, as such, with the NSS. The Regional Planning Guidelines (RPGs) for the Border Region 2010-202216 provide the framework for the specific development roles and capabilities of the Dundalk Gateway. The RPGs recognised that the development of complementary links between the Gateway of Dundalk and the Hubs of Monaghan and Cavan have yet to be developed to their full potential, with progress hampered due to deficiencies in both private and public transport links between the three centres. On a cross border basis, the development of the Dundalk Gateway, in conjunction with Drogheda and Newry, is emphasised as crucial to the effective economic and spatial ties with Northern Ireland. The RPGs were most recently updated in 2010 and will be subject to a fundamental review in 2016 following the planned reconfiguration of the eight Regional Authority (NUTS III) regions into three Regional Assemblies in 2014.

Local and Regional Government Reform
This recently unveiled local and regional government reform measure, contained within the reform programme ‘Putting People First: Action Programme for Effective Local Government’17, is intended as a comprehensive mechanism for the reform of local government in Ireland. Many of the 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.

---

14 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.
16 Ibid.
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).

From Dundalk’s perspective it should be noted that County Louth will move from the Border, Midland and Western Regional Assembly (which itself will become the Connacht-Ulster Assembly) administrative area to the newly formed Eastern and Midland Assembly area. It will be important that the Gateway’s continued evolution can flourish under these new arrangements.

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 Gateway and Hubs, as well as the continuing implementation of the RPGs, which will run until 2016, pending their replacement by the new regional strategies mentioned above, the preparation of which will commence in 2014/15.

The precedent which has been established in relation to the amalgamation of city and county councils is an important development with the Limerick and Waterford City and County Councils due to merge in 2014, as well as the amalgamation of Tipperary North and South County Councils, it paves the way for similar mergers throughout the country. Major centralisation has already taken place in the Dundalk Gateway area with the merger of several departments of the three Local Authorities.

The Importance of the Regional Development Dimension

The strengthening of regional government is essential to ensure that regional imbalances are addressed, and to manage the regional impact of national policies and programmes. A regional approach to enhancing competitiveness, and addressing the various strengths and weaknesses of individual regions, necessitates appropriate regional structures being in place. One example of the importance and potentially effective approach to regional development is seen in the recently published National Strategy for Higher Education, which also advocates regional clustering, wherein collaboration is fostered “between clusters of geographically proximate institutions, to ensure that individual, enterprise and societal needs are addressed in a planned, coherent and efficient way”. The report states that the clustering model proposed complements the NSS and will benefit from ongoing improvements in regional government structures18.

The Forfás Regional Competitiveness Agendas East 2010 explored how the Border Region could continue to develop a competitive environment. The report highlighted the challenges relating to leadership and governance mechanisms to develop and deliver on a coherent enterprise strategy, and the lower than State average productivity levels. Positive developments identified include a reduction in the number of ‘unskilled’ within the labour force over the past decade and early school leavers, and the establishment of internationally traded and financial services in the region. Key actions identified include measures to improve productivity of firms in the region, and investment in roads, electricity and water/waste water.

Planning Legislation
In terms of spatial planning legislative changes, the Planning and Development (Amendment) Act, 2010 enhances the objective of supporting economic renewal and sustainable development and strengthens the requirement for greater alignment between the NSS and RPGs and City/County Development plans and Local Area Plans. In addition, the requirement to prepare a Core Strategy grounded in an evidence-based assessment will augment Development Plans, while ongoing reforms to specific aspects of legislation such as the construct of ‘Part V’ (which relates to social and affordable housing) seeks to ensure that the statutory context is relevant and fit-for-purpose.

Resourcing Mechanisms for Spatial Policy
Prior to 2008 there was little by way of dedicated resourcing mechanisms in place (although Gateways were prioritised in Government capital funding programmes) to drive the implementation of policy. Furthermore, there has been an evident slowdown in the implementation of national economic policy in recent years owing to the scale of the prevailing economic conditions faced. Less diversified regional economies have been most affected by the downturn, such as the thirteen county Border, Midland and Western (BMW), for which a decline to 84.1% of the 2010 EU27 average gross value added (GVA) per person is apparent, representing a substantial drop of twenty-one percentage points compared to the same figure in 2006 GVA. One important objective in resourcing Gateway development is the compatibility and alignment of various programmes. For example, the Human Capital Investment Operational Programme 2007-2013 (supported by the European Social Fund) specifically seeks to align with the NSS, stating it “…will respect the work to be undertaken in implementing the NSS and through financing of projects in each of the regions will seek to contribute where possible to the aims of the NSS”. The resourcing of Gateway development is explored further in the next section.

19 Information taken from: http://www.forfas.ie/media/forfas100121-Regional-Competitiveness-Agendas-East.pdf
2.3 Resourcing Gateway Development

Prevailing Economic Conditions
The economic circumstances which the country has experienced since 2008 have had policy and programming impacts for Government expenditure. There has been a series of enforced funding cuts and new economic policies focused on gaining a greater control over public expenditure. In some cases there has been a direct impact upon the implementation (such as in the case of deferrals of infrastructure investment programmes) of the NSS as a result of these policies, while in other cases, the impact has been indirect (such as reduced funding for health services).

Two National Development Plans (NDPs, those of 2000-2006 and 2007-2013) have been in operation since the adoption of the NSS in 2002. The current NDP 2007-2013, which is, in effect, no longer in operation (and has been taken over by capital investment strategies, etc), has been much hampered by the effects of the economic downturn in recent years.

The deferral of the Gateway Innovation Fund (GIF) in 2008 has removed a vital funding mechanism specifically intended to enable the delivery of necessary flagship infrastructure and to aid in the realisation of goals and objectives within the individual Gateways. An initial Exchequer provision of €300 million over three years 2008-2010, was envisaged for the GIF\(^2\). Separately the two Regional Assemblies introduced grant schemes to utilise the European Regional Development Fund (ERDF) advances to the Regional Operational Programmes 2007-2013 to fund a number of Gateways and Hubs projects. These schemes funded Gateways and Hubs projects in the BMW Region providing €17 million in grant aid and Gateway projects in the S&E region with over €11 million in grant aid. The combined investment under both schemes across the two regions is over €50.5 million.

Impact on the Dundalk Gateway
The decline in development and infrastructure funding has impacted upon the realisation of a number of the goals of the Dundalk Gateway. There has been a notable decline in the overall amount of economic activity taking place within the Gateway. This has directly impacted upon the financial resources of the Local Authorities as the rates base within the county has contracted significantly. The amount of development which is taking place within the Gateway has declined substantially and this has further eroded the potential income streams which could have been used to fund Gateway objectives.

Gateway Investment
There have been some focused policies and strategies which have sought to enhance the strategic vision of the NSS at the regional and local level (as discussed earlier), providing guidance to the relevant authorities on how and where this development should take place. Amongst the most notable of these are the Border, Midland and Western Regional Operational Programmes\(^2\) managed by the BMW Regional Assembly, the RPGs, and the relevant City and County Development Plans and Local Area Plans. Many of these are statutory in nature, and are subject to review and replacement within statutorily defined periods. The manner in which they have sought to fulfill the goals of the NSS has also evolved. In this way, resulting policies have been influenced in their development by an extensive series of factors.

\(^2\) Details are available at: http://www.irishspatialstrategy.ie/.
\(^2\) Funding was provided from various EU funds for the 2000-2006 programme and from the European Regional Development Funds (ERDF) for the 2007-2013 programming period.
The European Regional Development Fund (ERDF) co-funded Gateway Grant Scheme funding mechanism managed by the Border, Midland and Western Regional Assembly\(^{25}\), is designed to assist and support economic, social and environmental enhancements within Gateways, with a specific emphasis on regeneration, infrastructure, cultural, and sustainable energy projects. The Dundalk Gateway was allocated €1.9m for the redevelopment of Market Square in the town centre as a multi-functional civic and social focus of the gateway.\(^{26}\)

The Transport 21\(^{27}\) programme, which ran between 2005 and 2010, has resulted in significant improvements in terms of infrastructural connectivity throughout the island of Ireland. These infrastructural improvements have led to a much more efficient transport system, especially between Dublin and the other designated Gateways and Hubs, as well as within the Gateways and Hubs themselves. In the case of Dundalk, the main benefits brought to the Gateway under Transport 21 are the completion and upgrades of sections of the M1/ A1 Dual Carriageway and additional Bus Éireann services and vehicles.

### 2.4 Emerging Policy Landscape

In response to the economic downturn, various recovery initiatives and strategies have been developed, and subsequently superseded. However, in many cases such policies neglect to take account of the vital regional grounding upon which the NSS is based. The future success of the NSS will depend upon the interaction of policies and funding strategies from a wide range of government departments, Local and Regional Authorities, and private sector involvement, designed to encourage balanced development, and allowing for the reinforcement of the regional dimension of the NSS, and the prioritisation of a regional approach to growth.

The recession brought with it a vast increase in the number of people who found themselves out of work. Economic recovery is predicated upon a reversal of this trend, and an emphasis on sustainable economic growth has become a government priority. Upon its release in 2010, the primary focus of the National Recovery Plan 2011-2014\(^{28}\) was to promote nationwide economic recovery. This plan sets out a series of reforms of both of a fiscal and structural nature, designed to make the country more competitive and attractive, and in doing so, develop new markets for existing and developing Irish goods, attract additional Foreign Direct Investment (FDI) (the Industrial Development Authority strongly advocates a regional spread of FDI in Ireland), and make Ireland an attractive place in which to do business.

However, one constraint of the National Recovery Plan is the lack of regional focus; the prioritisation of economic recovery at a national level, while perhaps reflective of the scale of the economic difficulty Ireland is in, failed to take account of structural weaknesses at a regional spatial scale. In this way, weaker parts of the country which were already struggling more than other areas may not be allowed to recover as quickly as they should. It must be noted that in 2012, there has been a significant growth in FDI beyond the Dublin region, with the IDA announcing the delivery of

---

\(^{25}\) European Regional Development Fund co-funded Gateways and Hubs Grant Scheme. Information available at: [http://www.bmwassembly.ie/gateways/about.html](http://www.bmwassembly.ie/gateways/about.html).

\(^{26}\) Information available at: [http://www.bmwassembly.ie/gateways/dundalk.html](http://www.bmwassembly.ie/gateways/dundalk.html).


12,722 jobs in 2012 alone, representing a net increase of 6,570 for the year, with notable FDI jobs gains in the Dundalk, Sligo, Galway and Limerick regions.

National Recovery Policy and Investment Framework
Following on from the National Recovery Plan, the Capital Investment Framework 2012-2016 document was designed to assess the existing and future capacity requirements of the Country’s infrastructure, in order to ensure that it is capable of facilitating the essential economic growth required to bring the country out of recession. Where an infrastructure deficit or funding requirement is identified, the policy states that capital will be made available to address this. The primary motivation for this policy is to ensure that, in spite of the limited quantity of funding available, necessary infrastructure developments and financial support for fledgling businesses will be obtainable.

The National Action Plan for Jobs policy document, published in 2012, seeks to reinforce the Government’s role as an employment facilitator rather than as a jobs provider. To this end, the document identifies seven principal areas on which to focus job creation activities within the coming number of years. The focus of these activities is primarily on enhancing the ability of Irish business to compete both nationally and internationally, encouraging entrepreneurship, identifying new markets, and developing new or as yet under-developed sectors, while also looking to attract new FDI and incentivise the expansion of existing operations, with a specific emphasis on the research sector. The National Action Plan for Jobs acknowledges the requirement for a regional focus, and sets out individual objectives which encompass a regional dimension; it also makes a commitment that government will commit “…to ensuring that job creation measures are targeted in a balanced way across all regions. The IDA is committed to delivering 50% of investments to areas outside Dublin and Cork.” However, while the National Action Plan for Jobs makes no direct reference to the NSS, being a more specific set of actions than a broad policy document, the publication of quarterly progress reports will outline the level of delivery of measures targeted for each quarter, with some measures having a regional focus.

2.5 The Importance of the Gateways and Hubs Development

Index to Inform Policy

The continued pursuance of balanced regional development and the development of designated areas to drive regional growth (such as Gateways and Hubs) should be seen as an integral part of the economic recovery of the country. One of the key lessons which should be learned from the period leading up to the economic downturn is in the area of the decision making process; poor decisions lead to poor outcomes. In many cases, the absence of comprehensive evidence to inform policy makers undermined the quality of decision making processes. Policy decisions formed on the basis of accurate and reliable information will help to avoid the type of poor decisions which have proved so damaging in our recent past, and result in more sustainable settlement patterns, economic and regional development.

The Gateways and Hubs Development Index (GHDI) study represents a valuable opportunity to use a comprehensive and accurate evidence base to provide a solid foundation on which to make decisions on the development of those Gateways and Hubs which are meant to form the key drivers of Ireland’s economic development. The manner in which it has been designed and compiled allows for it to be scalable from the individual Gateway and Hub level to regional and national levels, as well as being intended for ongoing update and renewal. In this way, it can be used to assist in the formulation and implementation of future regional development policies.

At the level of individual Gateways and Hubs, the opportunity to exploit an evidence-based approach to policy formulation, especially in the formulation of core strategies, can result in the more effective identification of potential barriers and the measures capable of addressing them. The insight which the GHDI provides can inform regionally specific development agendas and facilitate the identification of core strengths or weaknesses that need to be addressed. A detailed assessment of the progress of the Dundalk Gateway, as well as all of the other Gateways and Hubs, is seen as a useful tool to determine relevant trends and performance measured across a set of selected socio-economic indicators. In this way, the GHDI can play an important part in ensuring a more effective evaluation of how Gateways and Hubs are developing.
The analysis of the Gateway is undertaken using a series of eight domains and constituent indicators, respecting where possible those originally adopted in the Gateway Development Index (GDI) 2009. The Gateways and Hubs Development Index (GHDI) 2012 does reflect some minor changes in the suite of indicators used compared to the 2009 Index. While a small number of data sources were no longer collected additional indicators have been identified at relevant spatial levels which serve to further improve the evolution of the Index. The domains and indicators consist of:

1. **Population**
   - Population Growth
   - Age Vibrancy of Population

2. **Enterprise & Employment**
   - New Firm Formation
   - Sectoral Base & Provision of Services
   - Unemployment Rate

3. **Knowledge & Innovation**
   - Labour Force Quality
   - Third Level R&D

4. **Natural & Physical Environment**
   - River Water Quality
   - Consumable Water Infrastructure
   - Waste Recovery

5. **Transport & Connectivity**
   - Green Transport Usage
   - Travel-to-Work Times
   - Public Transport Availability
   - Retail Activity
   - IT Connectivity

6. **Health & Wellness**
   - Mortality
   - Birth Weight
   - Primary Health Care

7. **Crime**

8. **Affluence & Deprivation**
   - Affluence & Deprivation

**Interpreting the Analysis**

» The Gateways and Hubs Development Index 2012 – this refers to the compilation of a dataset based on data available across all domains to year end 2012, set against two geographical zones established using Census 2011 settlement and labour market flow data.

» The Gateways Development Index 2009 – 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.

» Gateway Score (Zone 1 and Zone 2) is calculated based on total figures for the combined gateway. Gateway scores may differ from strict averages based on the population, size and composition of individual zone characteristics.

» Comparison of Index Scores Over Time: Care should be taken to note that in the comparison of the Index scores, as presented within the summary assessment section of each domain assessment, these scores have been calculated against the Gateway average for the respective year. As a result the average score will change between years. Consequently, improvements over time (in raw numbers), may not actually match the pace of improvement for other Gateways.
3.2 Population

3.2.1 Population Growth

Indicator Description: Actual change in the number of person’s 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 where more than 20% of the resident population in employment commute to the Gateway (Zone1) for the purposes of work (derived from CSO POWSCAR, 2011) (Zone 2). 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).

The population of the Dundalk Gateway in 2011, according to CSO census data produced by the 2011 Census is 60,167\(^{33}\). This population figure illustrates an increase of 9.77% on that recorded in 2006, and 17.49% compared to 2002. The rate of population change between 2002-2006 and 2006-2011 increased by 2.74%. Between 2002-2006 population growth of 5.46% occurred within Zone 1 in comparison to 7.94% within Zone 1, while the figures for 2006-2011 show that the pace of population growth within Zone 1 had decreased slightly to 7.78%, whereas Zone 2 had increased to 13.30%. Although both Zones continue to demonstrate growth in population, there is a consistent gap in growth rates between Zones 1 and 2. This is especially evident in the context of the relatively stable rate of growth demonstrated by Zone 1 over the entire 2002-2011 period, when compared with the substantial increase in population growth demonstrated within Zone 2 over the 2006-2011 period. By way of comparison, the average growth rates for all Gateways were 5.90% for Zone 1, 12.06% for Zone 2, and 8.44% for the Gateway as a whole.

\[
\begin{array}{l|c|c|c}
\text{Zone 1} & \text{2006} & \text{2011} \\
\text{(between 2002-2006)} & (32,505-35,085) & (35,085-37,816) \\
\text{Population Growth} & \text{7.94%} & \text{7.77%} \\
\text{Source: Central Statistics Office} & & \\
\text{Population Change Difference (%)} & \text{-0.15%} & \\
\text{Zone 2} & \text{2006} & \text{2011} \\
\text{(between 2002-2006)} & (18,706-19,727) & (19,727-22,351) \\
\text{Population Growth} & \text{5.46%} & \text{13.30%} \\
\text{Population Change Difference (%)} & \text{7.84%} & \\
\text{Zone 1 & 2} & \text{2006} & \text{2011} \\
\text{(between 2002-2006)} & (51,211-54,812) & (54,812-60,167) \\
\text{Population Growth} & \text{7.03%} & \text{9.77%} \\
\text{Population Change Difference (%)} & \text{2.74%} & \\
\end{array}
\]

\(^{32}\) The population share figure was not used in the final compilation in the 2009 GDI report, and was not carried out within this report.

\(^{33}\) This figure consists of the population for the town of Dundalk and all surrounding areas where more than 20% of the resident population in employment commute to the Gateway for the purposes of work (derived from CSO POWSCAR, 2011).
Population Growth 2006-2011

Key
Population Change '06-'11
-12% - 0%
0% - 10%
10% - 25%
25% - 50%
> 50%

Age Dependency Change 2006-2011

Key
Change in Age Dependency '06-'11
-20% - 0%
0% - 5%
5% - 10%
10% - 20%
> 20%

Northern Ireland
County Louth
Dundalk
Ardke
Dunleer
Settlements > 1500
3.2.2 Age Vibrancy of Population

Indicator Description: 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 total working population. As regional growth leaders, Gateways 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 can be identified by measuring changes in relative age dependency rates.

Analysis of the dependency ratio for the Dundalk Gateway in 2011 reveals that 50.71% of the population living within the urban area (Zone 1) are classified as being dependent; this compares with 51.45% in 2002 and 49.30% in 2006. There have been significant changes in the dependency ratio within Zone 2, declining from 50.32% in 2002 to 48.85% in 2006 and increasing again to 53.47% in 2011. The overall dependency ratio for 2011 was 51.72%, while the adult and youth dependency rates are 17.58% and 34.15% respectively (both of which are above the average for all Gateways of 17.03% and 32.50% respectively). This dependency ratio is considerably higher than the national Gateway average of 49.53%, and represents an increase of 2.59% over the figure produced in 2006 (49.14%).

<table>
<thead>
<tr>
<th>Age Vibrancy (Dependency Ratio)</th>
<th>2006</th>
<th>Zone 1</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source: Central Statistics Office</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>YDR(^*) + 32.62% ADR + 16.68%</td>
<td>49.30%</td>
<td>50.71%</td>
<td></td>
</tr>
<tr>
<td>Change in Dependency Ratio</td>
<td>+ 41%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age Vibrancy (Dependency Ratio)</th>
<th>2006</th>
<th>Zone 2</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>YDR(^*) + 32.29% ADR + 16.55%</td>
<td>48.85%</td>
<td>53.47%</td>
<td></td>
</tr>
<tr>
<td>Change in Dependency Ratio</td>
<td>+ 4.62%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age Vibrancy (Dependency Ratio)</th>
<th>2006</th>
<th>Zone 1 &amp; 2</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>YDR(^*) + 32.50% ADR + 16.64%</td>
<td>49.14%</td>
<td>51.72%</td>
<td></td>
</tr>
<tr>
<td>Change in Dependency Ratio</td>
<td>+ 2.59%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

\(^*\) Dependency Ratio - is the proportion of those under 15 years or over 64 years as a proportion of the total population from 15 to 64 years.

\(^{**}\) YDR - Youth Dependency Ratio
\(^{***}\) ADR - Adult Dependency Ratio

---

34 The age dependency rate variable for the age vibrancy indicator is derived from CSO Census data. It should be noted that, in reality, there is likely to be substantial numbers of people aged 15 years and over that remain in full time education as well as a significant proportion of those who are aged over 65 and still form part of the work force.

35 This in effect means that for every 100 people within the Gateway, there are 48 within the productive age group cohorts and 52 who are in the dependent age group cohorts; these figures do not take into account those who are unemployed, disabled or incapable of work for some other reason.
3.2.3 Assessment

Under the Population domain the Dundalk Gateway’s composite Index score was 5.1 in the 2012 GHDI compared to 4.3 in the 2009 GDI, this reflects an increase of 0.8.

Under the Population domain the Dundalk Gateway’s Zone 1 Index score was 4.5 in the 2012 GHDI compared to 4.3 in the 2009 GDI, and this reflects an increase of 0.2.

Under the Population domain the Dundalk Gateway’s Zone 2 Index score was 5.3 in the 2012 GHDI compared to 4.4 in the 2009 GDI, this reflects an increase of 0.9.

Analysis of the population figures for Dundalk illustrates a trend of continuing growth since 2002, with both Zones 1 and 2 demonstrating increases in population during this period. However, differences are evident in the pace of growth between the two Zones represents an interesting trend. The Border Regional Authority Planning Guidelines 2010-2022 sets out a growth rate for the urban centre of the Dundalk Gateway of 8.88% between 2006-2010. In contrast, within the GHDI study, Zone 1 produced a growth figure of 7.78% between 2006-2011, one percentage point below this target. It is important to note that these figures are not directly comparable due to boundary differences, but it is possible to see that the urban core of the Gateway is showing lower levels of development in terms of population growth. The growth rate in Zone 2 has in contrast increased significantly, while the rate of population increase within Zone 1 remained stable. This indicates that a higher proportion of the population growth demand has been catered for outside of the urban core of the Gateway.

Population Growth 2002-2011

Population Between Zones

<table>
<thead>
<tr>
<th>Year</th>
<th>Zone 1 &amp; 2</th>
<th>Zone 1</th>
<th>Zone 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>18,706</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>32,505</td>
<td>19,727</td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>51,211</td>
<td>54,812</td>
<td>60,167</td>
</tr>
</tbody>
</table>

Comparison of Index Scores Over Time: Care should be taken to note that in the comparison of the Index scores, as presented within the summary assessment section of each domain assessment, these scores have been calculated against the Gateway average for the respective year. As a result the average score will change between years. Consequently, improvements over time (in raw numbers), may not actually match the pace of improvement for other Gateways.
The dependency ratio for the Dundalk Gateway also increased between 2002 and 2011. The number of dependent people (children under 14 years and adults over 65 years) living in the Dundalk area in 2011 was almost 4% higher than the average for all Gateways. While this indicates that the Gateway has been somewhat less successful than other Gateways in attracting or retaining people from the core working age cohorts, the relatively high youth dependency rate is evidence of a naturally expanding Gateway population. This is indicative of a high number of families with children living within the Gateway and raises significant future potential for Dundalk. This could be further enhanced if the population within the core working age cohorts increases, as these include those of child bearing age. A high youth dependency rate can be translated into a distinct advantage for the Gateway, as the young population matures into adulthood and is well placed to harness future economic opportunities.

Age Dependency
2006-2011

<table>
<thead>
<tr>
<th>Zone</th>
<th>2006</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zone 1</td>
<td>Overall Dependency Rate: 49.30%</td>
<td>50.71%</td>
</tr>
<tr>
<td></td>
<td>Youth Dependency Rate: 32.62%</td>
<td>33.28%</td>
</tr>
<tr>
<td></td>
<td>Old Dependency Rate: 16.68%</td>
<td>17.43%</td>
</tr>
<tr>
<td>Zone 2</td>
<td>Overall Dependency Rate: 48.85%</td>
<td>53.47%</td>
</tr>
<tr>
<td></td>
<td>Youth Dependency Rate: 32.29%</td>
<td>35.64%</td>
</tr>
<tr>
<td></td>
<td>Old Dependency Rate: 16.55%</td>
<td>17.82%</td>
</tr>
<tr>
<td>Zone 1 &amp; 2</td>
<td>Overall Dependency Rate: 49.14%</td>
<td>51.72%</td>
</tr>
<tr>
<td></td>
<td>Youth Dependency Rate: 32.50%</td>
<td>34.15%</td>
</tr>
<tr>
<td></td>
<td>Old Dependency Rate: 16.64%</td>
<td>17.58%</td>
</tr>
</tbody>
</table>
3.3.1 New Firm Formation

Indicator Description: The number of Value Added Tax (VAT) registrations by new firms per 1,000 of the labour force. Gateways that are developing successfully should experience faster growth rates in new firm formations than the national average.

The level of new firm formation recorded in 2011 within the Dundalk Gateway shows that there were 7.14 new firms established for every 1,000 employees within the Gateway, which is keeping pace with the average new firm formation figures for all Gateways of 7.29 firms per 1,000 employees. This latest figure shows a decline of some 2.27 firms in comparison to the figures for 2006 (9.41); this is a less significant decline than that which has taken place in many other Gateways, and slightly lower than the average rate of decline in new firm formations for all Gateways between 2006-2011. A higher number of new firms were established in the urban core of Dundalk (Zone 1), than in the surrounding catchment area (Zone 2) in both the years of 2006 and 2011.

<table>
<thead>
<tr>
<th>Zone</th>
<th>2006</th>
<th>2011</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zone 1</td>
<td>945</td>
<td>718</td>
<td>-227</td>
</tr>
<tr>
<td>Zone 2</td>
<td>934</td>
<td>707</td>
<td>-228</td>
</tr>
<tr>
<td>Zone 1 &amp; 2</td>
<td>941</td>
<td>714</td>
<td>-227</td>
</tr>
</tbody>
</table>

* New Firm Formations taken as VAT registration per 1,000 labour force.

3.3.2 Sectoral Base and Provision of Services

Indicator Description: Analysis of the sectoral base, as an indicator of economic activity is informed by the quantity of services within all enterprises of the Gateway, and gives a valuable insight into the economic development of the Gateway. Results are presented as a percentage of all services within the national economy which occur in this Gateway (the share of services in the economy), and compared with the percentage of the national population which is present within the Gateway.

The quality of the sectoral base is calculated based on the share of services in the total number of companies using the NACE coding (an EU statistical classification) of businesses in the GeoDirectory 2012 (database of all Irish buildings and addresses).

---

37 It is important to note that this indicator does not account for the scale of operation of the new business entity. It includes all new VAT registrations regardless of the size, type or character of the new firm.
There were 119,012 services recorded nationally in 2012. The Dundalk Gateway supported 1.45% (1,727 services) of these services with just 1.31% of the national population, which demonstrates a positive outcome for Dundalk. Analysis by Zone indicates that Zone 1 supports 1.01% of services (1,199 services) with 0.82% of the national population, while Zone 2 supports 0.44% of services (528 services) with 0.49% of the national population. By comparison, the average percentage of services present in all Gateways was 3.68% for Zone 1, 2.18% for Zone 2 and 5.87% for the combined Zones 1 and 2.

<table>
<thead>
<tr>
<th>Sectoral Base &amp; Provision of Services (%)</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zone 1</td>
<td>1.01%</td>
</tr>
<tr>
<td>Zone 2</td>
<td>0.44%</td>
</tr>
<tr>
<td>Zone 1 &amp; 2</td>
<td>1.45%</td>
</tr>
</tbody>
</table>

3.3.3 Unemployment Rate

Indicator Description: This indicator relates to the number of persons defined as "unemployed" within the Census 2006 and Census 2011 results. Successfully performing/developing Gateways 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).

The unemployment figure recorded for the Dundalk Gateway in 2011 is notably larger reflecting the downturn in the economy than that which was recorded in 2006. In 2006, the unemployment rate for the Gateway was 9.82%. By 2011, unemployment had increased to 24.19%, representing a 14.37% increase on the 2006 figure. Zone 1 has experienced a 15.14% increase in unemployment since 2006, to 26.53%, while Zone 2 recorded a 13.23% increase in the level of unemployment, increasing to 20.29%. By comparison, the average unemployment figure for all Gateways in 2011 stood at 19.94%.

---

38 This includes all service providers as listed within the GeoDirectory, regardless of size, type or character of the individual service; it encompasses the following broad categories: Construction, Hotel and Services, Transportation, Storage and Communication, Financial Intermediation, Real Estate Activities, Public Administration, Education, Health and Social Work, and Other Community, Social and Personal Activities. These categories are further subdivided allowing for the accurate characterisation of the service provider for the purposes of allocating a NACE Code.

39 This indicator uses Census derived data instead of the more widely used Live Register data. 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 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" (Central Statistics Office, 2012, This is Ireland: Highlights from Census 2011, Part 2. Appendix 3. P. 117 Available at: http://www.cso.ie/en/media/csoie/census/documents/thisisirelandpart2census2011/This%20is%20Ireland%20Highlights%20P2%20Full%20doc.pdf.

40 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.
Under the Enterprise and Employment domain the Dundalk Gateway's composite Index score was 4.3 in the 2012 GHDI compared to 4.1 in the 2009 GDI, this reflects an increase of 0.2.

Under the Enterprise and Employment domain the Dundalk Gateway's Zone 1 Index score was 4.4 in the 2012 GHDI compared to 4.1 in the 2009 GDI, this reflects an increase of 0.3.

Under the Enterprise and Employment domain the Dundalk Gateway's Zone 2 Index score was 4.4 in the 2012 GHDI compared to 4.4 in the 2009 GDI, this reflects no change.

As has been common across most Gateways, enterprise, service provision and employment have all produced figures which indicate a decline in the amount of economic activity occurring and this was no different within the Dundalk Gateway between 2006-2011. Despite a notable decline in the amount of new firms established in the Dundalk Gateway since 2006, the number of firms applying for VAT registrations remains in keeping with the average for all Gateways and the rate of decline has not been as significant as it has been in other Gateways. The Gateway also boasts a healthy proportion of service provision within a national context (in 2011 Dundalk hosted 1.45% of all services within the country, yet the population share is just 1.31% of the national population). Unemployment figures for the Gateways in 2011 vary significantly; the unemployment figure for Dundalk is the second highest of any of the designated Gateways, with only Letterkenny producing a higher unemployment figure. However, the announcement of over 1,400 new jobs for the Gateway in 2012, by companies such as PayPal and eBay, reflect a major confidence boost for Dundalk as an attractive location for investment.

<table>
<thead>
<tr>
<th>Year</th>
<th>Unemployment Rate (%)</th>
<th>Across Zones</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>11.39%</td>
<td>*14.37%</td>
</tr>
<tr>
<td>2006</td>
<td>7.06%</td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>9.82%</td>
<td></td>
</tr>
</tbody>
</table>

* Census variable taken as the number of those defined as ‘unemployed’ within the Census 2006 and Census 2011 results.
3.4 Knowledge and Innovation

3.4.1 Labour Force Quality

Indicator Description: 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 labour force capacity. A skilled and educated workforce is an important element for a successful Gateway, and an essential factor in attracting inward investment.

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% from 19.07% in 2006 to 25.97% in 2011. The bulk of this most recent growth can be attributed to Zone 2, which demonstrated a 7.89% increase (to 27.41%) over the period 2006 to 2011. An analysis of the figures for Zone 1 illustrates an increase from 18.63% in 2006 to 24.46% in 2011, an increase of 5.83%. By comparison, the average proportion of third level qualifications within the labour forces of all Gateways was 31.07% in 2011.

41 The Graduate Retention Rate was included in the 2009 GDI, but the statistical data required for this indicator is no longer available from the Higher Education Authority (HEA).

42 The 2009 GDI used this indicator with a different composition. The ‘Labour Force Quality’ indicator used in the 2009 GDI 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.
3.4.2 Third Level Research and Development

Indicator Description: This indicator quantifies the amount of research and development (R&D) financial support generated by third level institutions by 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.

The expansion of knowledge and innovation within the Dundalk Gateway, and particularly the enhanced importance of research and development funding, has become an important goal for all Gateways as they seek to take advantage of national and European policies aimed at promoting a knowledge based economic model. In the period 2006-2008, the Dundalk Gateway demonstrated a substantial increase in third level research and development funding per student admission, increasing from €888 in 2006 to €2,698 in 2008. This represents a sizeable increase within a very short period of time and resulted in the Dundalk Gateway overtaking some other Gateways with larger student populations (such as Waterford which has over 3,000 students more than Dundalk). Unfortunately, this level of research and development funding could not be sustained, and the figures produced for 2010 (€861) are slightly lower per enrolment than those produced in 2006 at €888, and represent a decline of €1,837 from the figure produced in 2008. By way of comparison, the average amount of funding per enrolled student for all Gateways in 2010 was €2,405.

43 This indicator consists of the merging of two indicators which featured in the 2009 GDI. ‘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.
3.4.3 Assessment

» Under the Knowledge and Innovation domain the Dundalk Gateway’s composite Index score was 4.0 in the 2012 GHDI compared to 4.2 in the 2009 GDI, this reflects a decrease of 0.2.

» Under the Knowledge and Innovation domain the Dundalk Gateway’s Zone 1 Index score was 4.1 in the 2012 GHDI compared to 4.1 in the 2009 GDI, this reflects no change.

» Under the Knowledge and Innovation domain the Dundalk Gateway’s Zone 2 Index score was 4.1 in the 2012 GHDI compared to 4.2 in the 2009 GDI, this reflects a decrease of 0.1.

The quality of the education base, as represented by the number of the labour force holding third level qualifications, improved within the Dundalk Gateway between 2006-2011, and progress is evident for both Zone 1 and Zone 2 over the period. However, despite the improvement, Dundalk has the lowest third level attainment level of all the Gateways. As of 2010, there were 4,528 students enrolled in third level institutions on either a full time or part time basis within the Dundalk Gateway; this figure has increased from 3,829 since 2008, and had reached 4,660 by 2011, representing a total increase of 831 admissions over the period44 in Dundalk Institute of Technology. Further enhancements of research and development activities will be important to the Dundalk Gateway, as literature relating to economic geography and the influence of spill-over’s from university research suggests that such spill-over’s are quite limited in distance45. In the Irish context, this implies that most of the benefits of the increased public investment in HERD (Higher Education Research and Development) will accrue to the university cities, and particularly Dublin with four universities in its vicinity. However, it should be noted that the Gateway scored very positively within the perception survey, with respondents rating the provision of third level education within the Gateway very highly.

44 Data relating to third level research and development funding is available for 2010 only; 2011 data is available for third level admissions at this stage, although for cross-comparison with the funding data, 2010 third level admissions rates have been utilised.

3.5 Natural and Physical Environment

3.5.1 River Water Quality

Indicator Description: 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 environment. Assessments of river water quality based on biological water quality criteria are primarily undertaken at a national level by the Environmental Protection Agency.

An examination of the water quality of rivers associated with Dundalk Gateway (including other settlements within the Gateway) has found it to be of good quality overall. Expressed on a scale of one to five, with one indicating seriously polluted water, and five indicating unpolluted water, the combined Zones 1 and 2 achieved four out of five. Analysis of the individual Zones reveals that the rivers within both Zones also achieved a score of four out of five. These figures were unchanged from those produced in 2006. By comparison, the average for all Gateways in 2011 was 3 for Zone 1, 4 for Zone 2 and 4 for the Gateway as a whole.

<table>
<thead>
<tr>
<th>River Water Quality</th>
<th>2008</th>
<th>Zone 1</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source: EPA</td>
<td>4</td>
<td></td>
<td>4</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>River Water Quality</th>
<th>2008</th>
<th>Zone 2</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source: EPA</td>
<td>4</td>
<td></td>
<td>4</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>River Water Quality</th>
<th>2008</th>
<th>Zone 1 &amp; 2</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source: EPA</td>
<td>4</td>
<td></td>
<td>4</td>
</tr>
</tbody>
</table>

* River Water Quality is based on a Scale of 1 (Poor) to 5 (Very Good).

46 A number of additional data sources (to those identified in the 2009 GDI) were examined to establish their feasibility as indicators. However, they were found to be unsuitable for varying reasons (such as reliability and scale of available data).
47 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.
48 For breakdown of assessment values, see http://www.epa.ie/qvalue/webusers/
3.5.2 Consumable Water Infrastructure

Indicator Description: A successful Gateway 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 which occurs within the catchment areas of water sources on the Environmental Protection Agency’s Remedial Action List (RAL). 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 Environmental Protection Agency (EPA), with compliance assessed against the standards set out in the Drinking Water Regulations. Water sources are listed on the EPA Remedial Action List (RAL) where the infrastructure does not meet the necessary standard or upgrades are required.

Analysis of the quality of consumable water infrastructure indicates that there were no water sources within the Dundalk Gateway in either 2008 and 2011 which were listed on the EPA RAL.

<table>
<thead>
<tr>
<th>Consmable Water Infrastructure (%)</th>
<th>2008</th>
<th>Zone 1 &amp; 2</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source: EPA</td>
<td></td>
<td></td>
<td>0%</td>
</tr>
<tr>
<td>Change in Consumable Water</td>
<td></td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Infrastructure (%)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*This indicator uses water source catchment data to express the proportion of the population in the relevant Gateway which occurs within the catchment areas of water sources on the Environmental Protection Agency’s Remedial Action List (RAL).*

3.5.3 Waste Recovery

Indicator Description: This indicator identifies the percentage of all household generated mixed municipal waste which is diverted from landfill for recycling or biological recovery. Good waste management practice, as evidenced by a high percentage of waste diversion, will have positive environmental effects for all Gateways and their surroundings, as well as functioning as a “test of Local Authority environmental management and responsibility.”

50 A full breakdown of these standards is available at: [http://www.epa.ie/downloads/pubs/water/dinking/publicwatersupplieshandbook/Section%202.pdf](http://www.epa.ie/downloads/pubs/water/dinking/publicwatersupplieshandbook/Section%202.pdf)
51 This indicator is based upon data derived from the 2006 and 2010 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.
Analysis of the waste recovery figures for 2006 illustrates that 26.38% of household waste generated within the Dundalk Gateway was diverted from landfill for recycling or biological recovery. By comparison, in 2011, this figure had increased to 43.65% representing a sizeable increase over this period. No breakdown of diversion rate was available for individual zones within the Gateway. This compares with an average of 41.23% for all Gateways and a national average of 41.41%53. In the 1998 policy document, Changing Our Ways, the Irish Government committed to achieving a diversion rate of 50% of household waste within 15 years (2013)54.

<table>
<thead>
<tr>
<th>Waste Recovery</th>
<th>2006</th>
<th>Zone 1 &amp; 2</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in Waste Recovered (%)</td>
<td>26.38%</td>
<td>46.35%</td>
<td>19.97%</td>
</tr>
</tbody>
</table>

* Proportion of total waste collected which is recycled.

### 3.5.4 Assessment

» Under the Natural and Physical Environment domain the Dundalk Gateway’s **composite** Index score was 5.6 in the 2012 GHDI compared to 5.6 in the 2009 GDI, indicating no change.

» Under the Natural and Physical Environment domain the Dundalk Gateway’s **Zone 1** Index score was 5.8 in the 2012 GHDI compared to 5.8 in the 2009 GDI, indicating no change.

» Under the Natural and Physical Environment domain the Dundalk Gateway’s **Zone 2** Index score was 5.5 in the 2012 GHDI compared to 5.5 in the 2009 GDI, indicating no change.

Analysis of the three indicators which inform the Natural and Physical Environment Domain demonstrate how the Dundalk Gateway is performing well in this crucial area. 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, a fact which is reflected in the results of the perception survey, which found that the perception of Gateway residents to the amount of litter within Dundalk had improved substantially since 2009 (and is the highest of all the Gateways). Dundalk’s progress in this regard aligns with the broader trend evident for the country, with the recession and a marked fall in consumption identified by the EPA as key factors in helping to achieve EU waste recovery targets55.

---


54 Ibid, p. 6.

55 Environmental Protection Agency (2013) Press Release Mar 25 2013 EPA report shows that recycling and recovery rates are improving Available at: [http://www.epa.ie/news/pr/2013/name,51205,en.html](http://www.epa.ie/news/pr/2013/name,51205,en.html)
3.6 Transport and Connectivity

3.6.1 Green Transport Usage

Indicator Description: 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\textsuperscript{56}. Amongst the key features of a successful Gateway 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.

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. The decrease has occurred consistently across both Zone 1 and Zone 2 of the Gateway. The average green transport usage across all Gateways was 14.98\% in 2011 and so from a comparatively viewpoint the Gateway is performing reasonably well in this regard.

<table>
<thead>
<tr>
<th>Zone</th>
<th>2005</th>
<th>2011</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Green Transport Usage (%)</td>
<td>Zone 1</td>
<td>25.46%</td>
<td>22.65%</td>
</tr>
<tr>
<td>Source: Central Statistics Office</td>
<td>Zone 2</td>
<td>8.38%</td>
<td>7.54%</td>
</tr>
<tr>
<td>Green Transport Usage (%)</td>
<td>Zone 1 &amp; 2</td>
<td>19.01%</td>
<td>16.70%</td>
</tr>
</tbody>
</table>

3.6.2 Travel-to-Work Times

Indicator Description: This indicator is based upon Census respondent’s personal experience of the duration of their journey to work\textsuperscript{57}. A successful Gateway will feature a higher proportion of people who will live within 30 minutes of their place of work.

The percentage of people living within 30 minutes of their place of work has undergone a slight decrease throughout the Dundalk Gateway between 2002 and 2011. In 2002, 70.97\% of people within the Gateway (Zones 1 and 2) lived within 30 minutes of their place of work. By 2006 this figure had declined to 69.80\%. The percentage of people living within 30 minutes of their place of work has shown a slight by 2011, with 67.96\% of the population were found to live within 30 minutes of their place of work. By comparison, the average percentage of people living within 30 minutes of their place of work for all Gateways was 64.22\%. Analysis of the individual Zones shows that 71.03\% of people living in Zone 1 reside within 30 minutes of their place of work, while the Zone 2 figure is 63.06\%.

\textsuperscript{56} This dataset is derived from CSO Census data.
\textsuperscript{57} This dataset is derived from CSO Census data.
3.6.3 Public Transport Availability

Indicator Description: This indicator is used to assess the availability of public transportation modes within the Gateway. Accessibility and availability of public transport which facilitates ease of movement for residents of a Gateway is an important consideration.

The accessibility rating based on availability of public transport and distance to key services within the Dundalk Gateway has been established as 9 out of 10 for Zone 1 and 6 out of 10 for Zone 2, giving a combined score of 7 out of 10. This is in line with the national Gateway average of 7 out of 10.

What Transport Do They Use?

Pobal (2006) Towards the Development of a Transport Accessibility Index. This Index has not been updated for 2011.
3.6.4 Retail Activity

Indicator Description: This indicator measures the number of retail outlets, expressing them per 100 households, within the Gateway. The provision of essential retail services is an important function of a Gateway, and the resident population should thus have access to same. 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.

Given that the provision of essential retail services to the Gateway population is an important function of a successful Gateway, by investigating the quantity of retail business availability, a clear contribution to the determination of Gateway performance within the Transport and Connectivity domain can be derived. In general scores at or above the average for all Gateways are satisfactory.

With 21,750 households and 595 retail outlets within the Dundalk Gateway in 2012, there are 2.74 retail outlets per 100 households. While Zone 1 returns a rate of 4.27 retail outlets per 100 households, Zone 2 records a rate of 1.11 retail outlets per 100 households. The average across all Gateways in 2012 was 2.37 retail outlets per 100 households.

59 This includes all retail outlets as listed within the GeoDirectory 2012, 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.

3.6.5 IT Connectivity

Indicator Description: This indicator quantifies the percentage of households within the Gateway who have (and are utilising) private access to broadband (not including dial up internet access). A high proportion of broadband accessibility is an essential feature of a Gateway.

The percentage of households with private broadband access has grown by 44.27% (to 61.90%) since 2006 within the Dundalk Gateway, based on figures available for 2011. In 2006, broadband access was available to 21.32% of households within Zone 1, while the equivalent figure within Zone 2 was just 10.28%. In the intervening period between 2006 and 2011, household access grew to 60.40% for Zone 1 and 63.49% for Zone 2; this represents an expansion of 39.08% and 53.20% respectively over both zones. The overall average IT connectivity across all Gateways in 2011 was 63.52%; by comparison, the EU average for all 27 Member States in 2011 was 67%.

<table>
<thead>
<tr>
<th>IT Connectivity (%)</th>
<th>Zone 1</th>
<th>Zone 2</th>
<th>Zone 1 &amp; 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>21.32</td>
<td>10.28</td>
<td>17.63</td>
</tr>
<tr>
<td>Change in IT Connect</td>
<td>39.08</td>
<td>53.20</td>
<td>44.27</td>
</tr>
<tr>
<td>Source: Central Statistics Office</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3.6.6 Assessment

» Under the Transport and Connectivity domain the Dundalk Gateway’s composite Index score was 5.3 in the 2012 GHDI compared to 5.2 in the 2009 GDI, this reflects an increase of 0.1.
» Under the Transport and Connectivity domain the Dundalk Gateway’s Zone 1 Index score was 4.8 in the 2012 GHDI compared to 4.7 in the 2009 GDI, this reflects an increase of 0.1.
» Under the Transport and Connectivity domain the Dundalk Gateway’s Zone 2 Index score was 4.5 in the 2012 GHDI compared to 4.9 in the 2009 GDI, this reflects a decrease of 0.4.

61 ‘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.
All of the Gateways have benefited from investments in transport and connectivity related infrastructure since 2006; in the case of Dundalk, this investment has produced mixed results. 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. This suggests that people are now commuting longer distances to work than they had done previously. In line with this trend, green transport usage has also declined, although it too remains above the average for all Gateways. Public transport accessibility, especially in Zone 1 has produced a positive result, and this is also reinforced by the results of the perception survey. The relatively positive perception of public transport is encouraging and suggests that opportunities to widen modal choices to include more sustainable options will be well received in the Gateway. In recent years, there has been a substantial investment in cycling lanes and general improvements to facilitate both cyclists and pedestrians in Dundalk, which has been supported by the national Smarter Travel Programme. Most recently, a safer routes for walking and cycling to school initiative was launched under the Department of Transport, Tourism and Sport, with Dundalk participating as a pilot town63. These initiatives and others are intended to support higher levels of green transport usage in the Gateway in the future.

The number of retail units per 100 households is higher than the Gateway average. Furthermore, broadly speaking, the Gateway appears to be adhering to the principles of the Retail Planning Guidelines 201264 which advocate a sequential approach to the location of retail developments in city and town centres, and only to allow retail development in edge of centre or out of centre locations where all other options have been exhausted. This adherence is demonstrated by the high proportion of retail units within the urban core and appears to indicate that the majority of the Gateway’s retail units are situated within Zone 1. It is relevant to note that shopping patterns in the Border Region can be influenced by currency and taxation fluctuations between the Euro and Sterling and can have a disproportionate effect on the local economies on both sides of the border.

The IT connectivity indicator results for Dundalk reveal that despite significant increases (a result which is also reinforced in perception survey results), the Gateway has produced the third lowest result of any of the Gateways, and is below the Gateway average for household take-up. Poor broadband access is a restrictive factor in attracting new business to the region and, while the indicator is a measure of take-up as opposed to availability and quality, it is important that the Gateway can provide quality broadband (for regional competitiveness in attracting new business). Further improvements are necessary and the recently launched National Broadband Plan for Ireland65, which sets out targets to achieve broadband download speeds of 70Mbps with a minimum of 40Mbps generally available and 30Mbps available in harder to reach rural areas, will support further advancement in this area.

---

3.7 Health and Wellness

3.7.1 Mortality

Indicator Description: This indicator is a measure of premature mortality within a Gateway, and can be used as a measure of the physical health of the population and the quality of life within a Gateway. Therefore a lower Years of Potential Life Lost (YPLL) score is an indication of a healthy Gateway population.

Years of potential life lost (YPLL) 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) 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).

In 2006, the YPLL recorded for both Zone 1 and Zone 2 of the Dundalk Gateway was 66.01 per 1,000 of the population, i.e. ‘66.01’ indicates the lost life, in person years, per 1,000 people in the Gateway. The recorded YPLL for both zones in 2011 was 60.45 per 1,000 of the population, representing an improvement of 5.56 years (which is a reduction in the premature mortality rate). By comparison, the average for all Gateways stands at 63.86 (per 1,000 of the population).

<table>
<thead>
<tr>
<th>Zone</th>
<th>2006 YPLL</th>
<th>2011 YPLL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zone 1</td>
<td>66.01</td>
<td>60.45</td>
</tr>
<tr>
<td>Zone 2</td>
<td>66.01</td>
<td>60.45</td>
</tr>
<tr>
<td>Zone 1 &amp; 2</td>
<td>66.01</td>
<td>60.45</td>
</tr>
</tbody>
</table>

Source: Central Statistics Office

66 This is a new indicator based on data which was unavailable at the time of the 2009 GDI; information from 2006 and 2011 was utilised to inform this indicator.
67 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 than 100,000).
68 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=LifeExpectancy&StatisticalProduct=DB_VS
69 The YPLL [79.6] calculated in this study takes Irish life expectancy which is 79.6 years. 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.
3.7.2 Birth Weight

Indicator Description: This indicator measures the average weight at birth of children born to parents from the Gateway. The birth weight\(^{70}\) can be used to provide an accurate indication of the health and well being of mothers within the Gateway, with higher average birth weights seen as being indicative of a healthier population.

Low birth weight is a major public health concern, primarily because babies who are born with a low birth weight are at a greatly increased risk of death in the first week and the first year of life. Furthermore, low birth weight is associated with a number of adverse developmental, educational, behavioural and socio-economic outcomes in childhood, adolescence and later life\(^{71}\). Low birth weight is typically considered to be those babies born weighing less than 2.5kgs.

The average birth weight of babies born to mothers who lived within the Dundalk Gateway in 2006 was 3.50kgs; the figure produced for 2011 was 3.45kgs, illustrating a decrease of 0.05kgs. These birth weights were the same across both Zones. The average birth weight across all Gateways in 2011 was 3.46kgs.

<table>
<thead>
<tr>
<th>Birth Weight</th>
<th>Zone 1</th>
<th>Zone 2</th>
<th>Zone 1 &amp; 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>3.50 KG</td>
<td>3.50 KG</td>
<td>3.50 KG</td>
</tr>
<tr>
<td>Change in Birth Weight (%)</td>
<td>- 0.05 KG</td>
<td>- 0.05 KG</td>
<td>- 0.05 KG</td>
</tr>
</tbody>
</table>

3.7.3 Primary Health Care

Indicator Description: This indicator quantifies the number of General Practitioners\(^{72}\) 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.

In 2011, the number of General Practitioners (GPs) within Zone 1 of the Dundalk Gateway was 1.06 GPs per 1,000 of the population, and was 0.54 GPs per 1,000 of the population within Zone 2. This produced an overall figure of 0.86 GPs per capita for the Gateway. Given that the Gateway average has been recorded as 0.98 GPs per 1,000 of the population, the Dundalk Gateway is performing slightly below this average.

\(^{70}\) Data derived from Health Service Executive datasets

\(^{71}\) Institute of Public Health in Ireland, 2006, Unequal at birth: Inequalities in the occurrence of low birth weight babies in Ireland. Available at: http://www.publichealth.ie/publications/unequalatbirthinequalitiesintheoccurrenceoflowbirthweightbabiesinireland

\(^{72}\) Data derived from Health Service Executive dataset.
Under the Health and Wellness domain the Dundalk Gateway’s composite Index score was 4.7 in the 2012 GHDI compared to 5.1 in the 2009 GDI, this reflects a decrease of 0.4.

Under the Health and Wellness domain the Dundalk Gateway’s Zone 1 Index score was 4.9 in the 2012 GHDI compared to 5.4 in the 2009 GDI, this reflects a decrease of 0.5.

Under the Health and Wellness domain the Dundalk Gateway’s Zone 2 Index score was 4.5 in the 2012 GHDI compared to 4.8 in the 2009 GDI, this reflects a decrease of 0.3.

Dundalk has demonstrated a higher than average year of potential life lost (YPLL); however, since 2006 this figure has been showing positive trends. Access to primary health care (GP’s) is also below the average for all Gateways. These statistics, in conjunction with the results of the Perception Survey, within which health services were rated quite poorly, suggest that the Gateway is comparatively underperforming in this domain. In addition, the rise in the dependancy rate (and in particular the adult dependancy rate i.e the over 65’s) has important implications for health care services and could place additional pressure on health services.
**3.8 Crime**

**3.8.1 Crime**

Indicator Description: This indicator quantifies the number of crimes per 100 of the population. It contains breakdowns in a number of crime categories. Crime data only includes reported crimes i.e. crimes that become known, or are reported to the Gardai. Many crimes are not reported. 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’.

Analysis of the crime figures for the Dundalk Gateway illustrates a minor change in the overall crime rate from 7 (7.47) crimes per 100 of the population in 2006 to 6 (6.33) crimes per 100 of the population in 2011; these figures remain constant across both Zones of the Gateway and are higher than the Gateway average of 5 (5.32) crimes per 100 of the population recorded in 2011.

Detailed analysis of the crime figures produced for the Dundalk Gateway indicates that there have been declines in some types of offence, but also notable increases in many others between 2006 and 2011. Amongst the offences which have demonstrated the most sizeable decreases in reported occurrences are damage to property and the environment offences (down by 23.59% or 214 instances), theft and related offences (down by 11.82% or 139 instances), and dangerous or negligent acts (down by 55.23% or 206 instances). There were increases in the numbers of reported instances of public order and other social code offences (up by 18.49% or 127 instances), and controlled drug offences (up by 72.06% or 98 instances).

<table>
<thead>
<tr>
<th>Year</th>
<th>Zone 1 &amp; 2</th>
<th>Change in Crime</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>4,093</td>
<td>747</td>
</tr>
<tr>
<td>2011</td>
<td>3,807</td>
<td>6,33</td>
</tr>
<tr>
<td></td>
<td>-286</td>
<td>-114</td>
</tr>
</tbody>
</table>

*Statistics relates to total crimes committed and the crimes per 100 of the population.

73 This domain has replaced the Social Facilities and Networks domain which formed part of the 2009 GDI, and which was omitted due to a lack of suitable data. It should however be note that the ‘Social Facilities and Networks’ domain was largely focussed on crime statistics in any event.

74 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.


Under the Crime domain the Dundalk Gateway’s composite Index score was 4.1 in the 2012 GHDI compared to 4.2 in the 2009 GDI, this reflects a decrease of 0.1.

Under the Crime domain the Dundalk Gateway’s Zone 1 Index score was 4.1 in the 2012 GHDI compared to 4.2 in the 2009 GDI, this reflects a decrease of 0.1.

Under the Crime domain the Dundalk Gateway’s Zone 2 Index score was 4.1 in the 2012 GHDI compared to 4.2 in the 2009 GDI, this reflects a decrease of 0.1.

Crime statistics for 2011 reveal a small reduction in the number of crimes that took place within both Zones 1 and 2 of the gateway based on 2007 figures. Any reduction in the crime rate is positive news for the Gateway in terms of quality of life, economic and health systems. The results of the perception survey appear to support this, with slightly more people agreeing that the Dundalk Gateway is an attractive place to live in 2011, than was the case in 2009.

<table>
<thead>
<tr>
<th>Zone</th>
<th>2006</th>
<th>2011</th>
<th>Change</th>
<th>Change in Crime</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zone 1</td>
<td>2,620</td>
<td>2,393</td>
<td>-227</td>
<td>-1.14 decrease denotes improvement</td>
</tr>
<tr>
<td>Zone 2</td>
<td>1,473</td>
<td>1,414</td>
<td>-59</td>
<td>-1.14</td>
</tr>
</tbody>
</table>

3.8.2 Assessment
3.9.1 Affluence and Deprivation

Indicator Description: 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, 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, 201278).

An examination of the Affluence and Deprivation Index for the Dundalk Gateway indicates that despite some improvements there is still a high level of deprivation evident within the Gateway. The overall score returned by the Gateway in 2011 was -3.58, although this is an improvement of 0.92 on the figure of -4.50 produced in 2006. Analysis of the individual Zones, illustrates a higher concentration of deprivation within Zone 1 (-5.41 in 2006, -4.23 in 2011) in comparison with Zone 2 (-1.64 in 2006 and -1.66 in 2011). Evaluation of these figures raises some elements of concern, such as slight but noteworthy increases of deprivation which is apparent within Zone 2, as well as the level of deprivation which appears evident within Zone 1, which although showing some signs of improvement, must still be seen to represent a weakness in the performance of the Gateway to date. By comparison, the average figures for all Gateways were -0.07 within Zone 1, -0.24 within Zone 2 and -0.03 across both Zones in 2011.

<table>
<thead>
<tr>
<th>Affluence and Deprivation Source: Haase and Pratschke, 2011</th>
<th>Zone 1</th>
<th>2006</th>
<th>Zone 2</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relative Index Change</td>
<td></td>
<td>+1.18</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Affluence and Deprivation</td>
<td></td>
<td>-5.41</td>
<td></td>
<td>-1.64</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Zone 2</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affluence and Deprivation</td>
<td>-1.66</td>
</tr>
<tr>
<td>Relative Index Change</td>
<td></td>
</tr>
<tr>
<td>Zone 2</td>
<td>2011</td>
</tr>
<tr>
<td>Affluence and Deprivation</td>
<td>-0.02</td>
</tr>
<tr>
<td>Relative Index Change</td>
<td></td>
</tr>
</tbody>
</table>

3.9.2 Assessment

» Under the Affluence and Deprivation domain the Dundalk Gateway’s composite Index score was 3.8 in the 2012 GHDI compared to 3.6 in the 2009 GDI, this reflects an increase of 0.2.

» Under the Affluence and Deprivation domain the Dundalk Gateway’s Zone 1 Index score was 3.7 in the 2012 GHDI compared to 3.5 in the 2009 GDI, this reflects an increase of 0.2.

» Under the Affluence and Deprivation domain the Dundalk Gateway’s Zone 2 Index score was 4.5 in the 2012 GHDI compared to 4.5 in the 2009 GDI, this reflects no change.

77 This indicator is based on the Pobal HP Deprivation Index (Haase and Pratschke, 2012). Available at: https://www.pobal.ie/Pages/New-Measures.aspx.
78 Ibid.
Dundalk has produced a high deprivation rating for both Zones 1 and 2 and represents the highest deprivation rates across the nine Gateways. Analysis of Zone 1 reveals that despite some improvement, there remains a very high concentration of deprivation within the urban core of Dundalk. This deprivation score is also the highest rating produced by any Zone 1 within all of the Gateways. There are numerous factors contributing to this, such as the comparatively low level of third level qualifications amongst the Gateway population and the high unemployment rate.\footnote{The Deprivation Index Tool developed by All Ireland Research Observatory (AIRO) provides a database for the island of Ireland, which Local Authorities and agencies situated in the Border Region may find useful in comparing the performance of their administrative area with that of areas situated north of the border in Northern Ireland.}
The Perception study in 2012 involved a common survey across the nine Gateways, using on-street interviews with a random sample of the adult resident population in each Gateway. All survey interviewing was conducted in October 2012.

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. The statistical margin of error on a sample size of 2,300 is just +/- 2%; the margin of error on a sample 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.’ The survey questionnaire asked Gateway residents to comment on each of the following subjects:

- Awareness of the Gateway idea
- Business and Employment in the Gateway
- Education, Skills, and Training Provision in the Gateway
- Services in the Gateway
- Health and Well-being in the Gateway
- Overall assessment of the Gateway as a place to live
- Institutional Environment in the Gateway
- Physical Environment in the Area in the Gateway
- Social Facilities/Supports in the Gateway

4.2 Findings of Perception Survey

Overall, local perceptions of Dundalk are comparatively strong across the key issues covered in the survey.

Awareness that Dundalk is a designated Gateway is very low however at 23% but residents are most likely across the full survey to perceive that being a Gateway is important for their area.
Dundalk residents perceive that education, skills and training provision is a key strength for the area. Indeed, they are most positive across all Gateways in relation to the provision of these services in their area. The rating of primary, secondary, third level education and training were all given the highest ratings across all Gateways in the survey. They are also most likely to consider that general education has improved in their area in the last five years.

Such perceived development is also evident in perceptions of the physical environment in Dundalk. Here residents are the most likely to perceive that litter, information communications technology and the availability of high speed broadband has improved in the past five years.

The rating of social facilities and supports in Dundalk is more equivocal. The rating of sporting and entertainment facilities is slightly below average as is the sense that these facilities have improved over the past five years.

Overall, the cultural assessment of Dundalk appears positive with the area receiving good ratings as an attractive and enjoyable place to live and work. Despite the perceived improvements in the last five years however, Dundalk residents are not overly likely to consider Dundalk as a dynamic place that is well equipped for the future.

As a general rule, the perceptions of those who live in the core Gateway area (Zone 1) and those from the functional area (Zone 2) of the Dundalk Gateway wider areas are consistently similar throughout the survey. Where differences do emerge they are typically focused on a recurring series of issues. Awareness of the Gateway idea for example is invariably higher in the Zone 1 area as is the sense that being a Gateway is a good idea for the town and has had practical significance to date. On the physical environment and services, residents of the core area are typically more positive about the provision of ICT and specifically high speed broadband. The same is also true of public transport, where residents of Zone 2 are more critical both in terms of overall provision and the extent to which it has improved in the last five years. Other than this, services in the Gateway are ranked in a very similar manner between the two groups of residents. Notwithstanding the frequent uniformity, core Gateway residents are likely to deliver a more positive overall cultural assessment than those from the wider area, typically perceiving that the Gateway is a relatively more attractive and enjoyable place to live and work.

The results of the perception survey for Dundalk are provided in the Appendices to this report.
5.0 GDI 2009 Versus GHDI 2012

5.1 GDI 2009 and GHDI 2012: Indices Scores

The composite Index for the Dundalk Gateway is shown with the bar chart below. This shows the composite Gateway and Hubs Index 2012 score compared to the 2009 Index and how it is performing across the eight domains considered. It is also important to note that, within each domain, the indicators are evenly weighted. The weighted sum for each domain is then used in calculating the composite Index.
A summary for the Zone 1 and Zone 2 areas of the Dundalk Gateway are shown below, demonstrating how each Zone is performing across the eight domains is and an overall composite score representing the Index score per Zone for 2012 and 2009.
Appendix 1 - Steering Committee

Name  
Mr. Gerry Finn  
Mr. Adrian O'Donoghue  
Mr. Stephen Blair  
Ms. Derville Brennan  
Mr. Niall Cussen  
Mr. Michael Walsh  
Dr. Barry Vaughan  
Mr. Rory O’Rua  

Title  
Director  
Policy & Research Officer  
Director  
Research & Communications Officer  
Senior Planning Adviser  
Waterford City Manager  
Policy Analyst  
Assistant Principal  

Organisation  
Border, Midland and Western Regional Assembly  
Southern and Eastern Regional Assembly  
Department of Environment, Community and Local Government  
County and City Managers Association  
Department of An Taoiseach  
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  
» Padraig Maguire  
» Ann Bogan  
» Turlough King  
» Owen Keegan  
» David Irvine  
» Joe O’Neill  
» Paul Foley  
» Joan Martin  
» Pat Gallagher  
» Aoife Moore  
» John Bradley  
» Gavin Daly  
» Justin Gleeson  
» Brian Beck  
» Declan Kirrane  
» James Lavin  
» Bryan Riney  
» Michael Walsh  
» Teresa O’Reilly,  
» Gerry Finn  
» Adrian O’Donoghue  
» Stephen Blair  
» Derville Brennan  

» Niall Cussen  
» William Hynes  
» Stephen Purcell  
» James Sweeney  
» John O’Mahony

Title  
RPG Officer  
Senior Planner  
Executive Planner  
County Manager  
Senior Planner  
City Manager  
Senior Executive Officer  
Louth County Manager  
Senior Planner  
RPG Officer  
RPG Officer  
ESPON National Contact Point  
AIRO Project Manager  
Senior Planner  
Director of Services  
RPG Officer  
PRG Officer  
City Manager  
RPG Officer  
Director  
Policy & Research Officer  
Director  
Research & Communications Officer  
Senior Adviser  
Director  
Senior Associate  
Planning Consultant  
Associate Director

Organisation  
Border Regional Authority  
Cork City Council  
Dublin Regional Authority  
DLR County Council  
DLR County Council  
Galway City Manager  
Limerick City and County Council  
Louth County Council  
Meath County Council  
Midlands Regional Authority  
Mid-West Regional Authority  
NIRSA/ESPON  
NIRSA/AIRO  
North Tipperary County Council  
Offaly County Council  
South-East Regional Authority  
South-West Regional Authority  
Waterford City Council  
West Regional Authority  
BMW Regional Assembly  
BMW Regional Assembly  
Southern & Eastern Regional Assembly  
Southern & Eastern Regional Assembly  
Department of Environment,  
Future Analytics Consulting  
Future Analytics Consulting  
Future Analytics Consulting  
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 | Director | 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
Stephan Purcell | Senior Associate | Future Analytics Consulting
William Hynes | Director | Future Analytics Consulting
John O’Mahoney | Associate Director | Behaviours & Attitudes
### BMW Regional GHDI 2012 Stakeholder Consultation Workshop (Ballina/Castletown, Galway, Midland, Sligo and Tuam)
BMW Regional Assembly, Ballaghaderreen, Co. Roscommon. March 21st 2013

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

### BMW Region GHDI 2012 Stakeholder Consultation Workshop (Cavan/Dundalk/Letterkenny/Monaghan)
Monaghan County Council Chamber, M:TEK Building, Monaghan March 27th 2013

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Organisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Padraig Maguire</td>
<td>RPG Officer</td>
<td>Border Regional Authority</td>
</tr>
<tr>
<td>Ger Finn</td>
<td>Director of Services</td>
<td>Cavan County Council</td>
</tr>
<tr>
<td>Denis Kelly</td>
<td>Senior Executive Planner</td>
<td>Donegal County Council</td>
</tr>
<tr>
<td>Lorretta McNicholas</td>
<td>Research and Policy Manager</td>
<td>Donegal County Council</td>
</tr>
<tr>
<td>Paddy Matthews</td>
<td>Vice President</td>
<td>Dundalk Chamber of Commerce</td>
</tr>
<tr>
<td>Deirdre Craven</td>
<td>Regional Executive, NE</td>
<td>IDA</td>
</tr>
<tr>
<td>Joan Martin</td>
<td>County Manager</td>
<td>Louth County Council</td>
</tr>
<tr>
<td>David Storey</td>
<td>Senior Executive Officer</td>
<td>Louth County Council</td>
</tr>
<tr>
<td>Tóirleach Gourley</td>
<td>Acting Town Engineer</td>
<td>Monaghan County Council</td>
</tr>
<tr>
<td>Jonathan Condell</td>
<td>Assistant Planner</td>
<td>Monaghan County Council</td>
</tr>
<tr>
<td>Helen Hughes</td>
<td>CEO</td>
<td>Udarás na Gaeltachta</td>
</tr>
<tr>
<td>Stiofán O’Cualain</td>
<td>Director</td>
<td>BMW Regional Assembly</td>
</tr>
<tr>
<td>Gerry Finn</td>
<td>Policy &amp; Research Officer</td>
<td>BMW Regional Assembly</td>
</tr>
<tr>
<td>Adrian O’Donoghue</td>
<td>Research &amp; Communications Officer</td>
<td>Southern &amp; Eastern Regional Assembly</td>
</tr>
<tr>
<td>Derville Brennan</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Appendix 3 - Perception Survey Findings

The colour coding system used in the charts below broadly applies a statistical margin of error (+/- 6.2% and +/- 0.62 on the 10 point scales) to provide readers with an immediate assessment of how the Gateway performs against the survey average.

<table>
<thead>
<tr>
<th>Status</th>
<th>Perception Study Question</th>
<th>Response</th>
<th>Total of 20 Gateway Areas</th>
<th>2012</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Awareness of the “Gateway” Idea</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Aware that area is designated “Gateway”</td>
<td>Yes</td>
<td>35%</td>
<td>23%</td>
<td>32%</td>
</tr>
<tr>
<td></td>
<td>Gateway as a good idea for the town itself</td>
<td>Yes</td>
<td>80%</td>
<td>84%</td>
<td>71%</td>
</tr>
<tr>
<td></td>
<td>Gateway as a good idea for the surrounding region</td>
<td>Yes</td>
<td>75%</td>
<td>82%</td>
<td>68%</td>
</tr>
<tr>
<td></td>
<td>Gateway is important for the area</td>
<td>Yes</td>
<td>80%</td>
<td>89%</td>
<td>63%</td>
</tr>
<tr>
<td></td>
<td>Being a Gateway has had any practical significance to date</td>
<td>Yes</td>
<td>41%</td>
<td>47%</td>
<td>32%</td>
</tr>
<tr>
<td></td>
<td><strong>Business and Employment in the Gateway</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Gateway area as a Location for business</td>
<td>(1/10)</td>
<td>7.51</td>
<td>7.48</td>
<td>7.56</td>
</tr>
<tr>
<td></td>
<td>Gateway area as a Location for employment</td>
<td>(1/10)</td>
<td>7.01</td>
<td>6.65</td>
<td>6.85</td>
</tr>
<tr>
<td></td>
<td><strong>Education, Skills, and Training Provision in the Gateway</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rating of provision of Primary education within the Gateway area</td>
<td>(1/10)</td>
<td>8.00</td>
<td>8.82</td>
<td>7.72</td>
</tr>
<tr>
<td></td>
<td>Rating of provision of Secondary education within the Gateway area</td>
<td>(1/10)</td>
<td>7.99</td>
<td>8.95</td>
<td>7.48</td>
</tr>
<tr>
<td></td>
<td>Rating of provision of Third-level education within the Gateway area</td>
<td>(1/10)</td>
<td>7.82</td>
<td>9.12</td>
<td>7.17</td>
</tr>
<tr>
<td></td>
<td>Rating of provision of Training within the Gateway area</td>
<td>(1/10)</td>
<td>7.47</td>
<td>8.57</td>
<td>7.11</td>
</tr>
<tr>
<td></td>
<td>Over the last five years provision for Primary education has..</td>
<td>improved</td>
<td>39%</td>
<td>59%</td>
<td>6%</td>
</tr>
<tr>
<td></td>
<td>Over the last five years provision for Secondary education has..</td>
<td>improved</td>
<td>38%</td>
<td>60%</td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>Over the last five years provision for Third-level education has..</td>
<td>improved</td>
<td>44%</td>
<td>64%</td>
<td>6%</td>
</tr>
<tr>
<td></td>
<td>Over the last five years provision for Training has..</td>
<td>improved</td>
<td>35%</td>
<td>45%</td>
<td>4%</td>
</tr>
</tbody>
</table>

**Legend**

- **Above Gateway Average**
- **At Gateway Average**
- **Below Gateway Average**
- **Highest among Gateways**
- **Lowest among Gateways**
#### Dundalk Gateway Perception Study

<table>
<thead>
<tr>
<th>Perception Study Question</th>
<th>2009</th>
<th>2012</th>
<th>Improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Services in the Gateway</td>
<td>Rating of Public transport</td>
<td>6.61</td>
<td>6.62</td>
</tr>
<tr>
<td></td>
<td>Rating of Health services</td>
<td>7.50</td>
<td>5.8</td>
</tr>
<tr>
<td></td>
<td>Rating of Other public services</td>
<td>4.24</td>
<td>6.1</td>
</tr>
<tr>
<td></td>
<td>Rating of Recreation facilities</td>
<td>2.22</td>
<td>7.68</td>
</tr>
<tr>
<td>Health and Well-being in the Gateway</td>
<td>Rating of Public transport within the Gateway area</td>
<td>6.74</td>
<td>6.66</td>
</tr>
<tr>
<td></td>
<td>Rating of Health services within the Gateway area</td>
<td>7.63</td>
<td>7.76</td>
</tr>
<tr>
<td></td>
<td>Rating of Other public services within the Gateway area</td>
<td>6.17</td>
<td>6.66</td>
</tr>
<tr>
<td></td>
<td>Rating of Recreation facilities within the Gateway area</td>
<td>6.17</td>
<td>7.76</td>
</tr>
<tr>
<td>Total (All Gateways)</td>
<td>Rating of Public transport</td>
<td>6.62</td>
<td>6.62</td>
</tr>
<tr>
<td></td>
<td>Rating of Health services</td>
<td>5.8</td>
<td>5.8</td>
</tr>
<tr>
<td></td>
<td>Rating of Other public services</td>
<td>6.1</td>
<td>6.1</td>
</tr>
<tr>
<td></td>
<td>Rating of Recreation facilities</td>
<td>4.24</td>
<td>4.24</td>
</tr>
<tr>
<td>Highest among Gateways</td>
<td>Rating of Public transport</td>
<td>6.4</td>
<td>6.4</td>
</tr>
<tr>
<td></td>
<td>Rating of Health services</td>
<td>6.07</td>
<td>6.07</td>
</tr>
<tr>
<td></td>
<td>Rating of Other public services</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Lowest among Gateways</td>
<td>Rating of Public transport</td>
<td>5.8</td>
<td>5.8</td>
</tr>
<tr>
<td></td>
<td>Rating of Health services</td>
<td>6.07</td>
<td>6.07</td>
</tr>
<tr>
<td></td>
<td>Rating of Other public services</td>
<td>27%</td>
<td>27%</td>
</tr>
</tbody>
</table>

Legend:
- **Green Arrow**: Above Gateway Average
- **Red Arrow**: Below Gateway Average
- **Yellow Arrow**: At Gateway Average
<table>
<thead>
<tr>
<th>Perception Study Question</th>
<th>Dundalk 2012</th>
<th>Dundalk 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Facilities/Supports in the Gateway</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rating of Sporting facilities</td>
<td>7.48</td>
<td>7.37</td>
</tr>
<tr>
<td>Rating of Entertainment facilities</td>
<td>6.84</td>
<td>6.62</td>
</tr>
<tr>
<td>Rating of Parks</td>
<td>6.75</td>
<td>6.72</td>
</tr>
<tr>
<td>Rating of Libraries</td>
<td>6.81</td>
<td>7.00</td>
</tr>
<tr>
<td>Rating of Arts/culture facilities</td>
<td>6.9</td>
<td>7.23</td>
</tr>
<tr>
<td>Rating of Entertainment facilities within the Gateway area</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improved</td>
<td>3.4%</td>
<td>4%</td>
</tr>
<tr>
<td>Improved</td>
<td>36%</td>
<td>33%</td>
</tr>
<tr>
<td>Improved</td>
<td>43%</td>
<td>37%</td>
</tr>
<tr>
<td>Improved</td>
<td>36%</td>
<td>12%</td>
</tr>
<tr>
<td>Regularity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Above Gateway Average</td>
<td></td>
<td></td>
</tr>
<tr>
<td>At Gateway Average</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Below Gateway Average</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Highest among Gateways</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lowest among Gateways</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Legend:
- Green circle: Above Gateway Average
- Yellow circle: At Gateway Average
- Red circle: Below Gateway Average
<table>
<thead>
<tr>
<th>Status</th>
<th>Perception Study Question</th>
<th>Response</th>
<th>Total (All Gateways)</th>
<th>Dundalk 2012</th>
<th>Dundalk 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Physical Environment in the Area in the Gateway</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Overall physical environment within the Gateway area</td>
<td>(1/10)</td>
<td>6.74</td>
<td>6.63</td>
<td>7.00</td>
</tr>
<tr>
<td></td>
<td>Transport infrastructure within the Gateway area has..</td>
<td>improved</td>
<td>47%</td>
<td>36%</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>Traffic Congestion within the Gateway area has..</td>
<td>improved</td>
<td>35%</td>
<td>24%</td>
<td>30%</td>
</tr>
<tr>
<td></td>
<td>Air Quality within the Gateway area has..</td>
<td>improved</td>
<td>30%</td>
<td>9%</td>
<td>24%</td>
</tr>
<tr>
<td></td>
<td>Litter within the Gateway area has..</td>
<td>improved</td>
<td>46%</td>
<td>62%</td>
<td>17%</td>
</tr>
<tr>
<td></td>
<td>ICT within the Gateway area has..</td>
<td>improved</td>
<td>66%</td>
<td>81%</td>
<td>2%</td>
</tr>
<tr>
<td></td>
<td>High Speed Broadband within the Gateway area has..</td>
<td>improved</td>
<td>66%</td>
<td>81%</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td><strong>Institutional Environment in the Gateway</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Identifiable leadership of the Gateway At local authority level</td>
<td>Yes</td>
<td>37%</td>
<td>39%</td>
<td>37%</td>
</tr>
<tr>
<td></td>
<td>Identifiable leadership of the Gateway Other level e.g. community</td>
<td>Yes</td>
<td>45%</td>
<td>50%</td>
<td>34%</td>
</tr>
<tr>
<td></td>
<td><strong>Overall</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>This area is an attractive place to live</td>
<td>(1/10)</td>
<td>7.5</td>
<td>7.77</td>
<td>7.37</td>
</tr>
<tr>
<td></td>
<td>This area is an enjoyable place to live</td>
<td>(1/10)</td>
<td>7.52</td>
<td>7.75</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>This area is an attractive place to work</td>
<td>(1/10)</td>
<td>7.44</td>
<td>7.69</td>
<td>7.02</td>
</tr>
<tr>
<td></td>
<td>This area is a dynamic place (developing/ changing)</td>
<td>(1/10)</td>
<td>6.68</td>
<td>6.44</td>
<td>6.13</td>
</tr>
<tr>
<td></td>
<td>This area is a place well equipped for the future</td>
<td>(1/10)</td>
<td>6.55</td>
<td>6.44</td>
<td>6.40</td>
</tr>
<tr>
<td></td>
<td>Would vote if there was a General Election tomorrow</td>
<td>Definitely</td>
<td>64%</td>
<td>73%</td>
<td>-</td>
</tr>
</tbody>
</table>

**Legend**
- **Above Gateway Average**
- **At Gateway Average**
- **Below Gateway Average**
- **Highest among Gateways**
- **Lowest among Gateways**