

Where will Future Population Growth Occur?

Regional Population Projections 2016-2031

WDC Report, December 2014

Summary¹

Population increase across all regions

The CSO recently issued *Regional Population Projections* for the period 2016-2031². Population growth and where it is likely to occur is important in planning for both public and private investment across a range of sectors from housing and enterprise to the provision of services such as education, health, transport and broadband.

The population of Ireland in 2011 was 4.5 million and it is projected to rise to 5.1 million in 2031, an increase of 613,000 people. It is projected that all regions will record a net increase in population. The most significant increase is predicted to occur in Dublin and the Mid-East – the Greater Dublin Area (GDA) – which is projected to grow by 401,400, accounting for 65% of total population growth.

Population to become more concentrated

Differing projected growth rates across regions mean that the population distribution across the country will change compared to that in 2011. The GDA accounted for 39.2% of the population in 2011 and by 2031 it is projected to account for 42.3% of the total population, see Table 1 below.

Table 1. Population Share 2011 and Projected Population Share 2031 by Region

Regional Authority area	Population Share 2011	Projected Population Share 2031	Change in Population Share 2011-2031
	%	%	%
Border	11.3	10.3	-1.0
GDA	39.2	42.3	3.1
<i>Dublin</i>	27.6	29.3	1.7
<i>Mid-East</i>	11.7	13.1	1.4
Midland	6.2	6.0	-0.2
Mid-West	8.3	7.9	-0.4
South-East	10.9	10.6	-0.3
South-West	14.5	14.1	-0.4
West	9.6	8.8	-0.8

¹ This two page summary can be downloaded as a separate *WDC Insights* publication from <http://www.wdc.ie/publications/reports-and-papers/>

² These population projections are contained in the CSO *Regional Population Projections* release available at <http://www.cso.ie/en/releasesandpublications/er/rpp/regionalpopulationprojections2016-2031/#.U9DQF8tOWP8>. The CSO compiles six different sets of projections, but focuses on one, the M2F2 Traditional scenario, which is the source of all data and analysis in this paper.

All regions, apart from Dublin and the Mid-East, will lose population share under these projections. The Border region share is set to decline by the most, its national share of population declining by 1 percentage point over the period to reach 10.3% of the national total in 2031. The West region has the next largest decline from a 9.6% share in 2011 to a projected 8.8% share in 2031.

West and Border with lowest projected population growth

The West and Border regions have the lowest projected population growth rates, each with an annual average projected growth rate of 0.2%. The Mid-West and Midland regions are next lowest, both with projected annual average growth rates of 0.4%. The South-East and South-West regions are projected to grow annually by an average of 0.5%, while Dublin and the Mid-East will have the highest rates of population growth of 0.9% and 1.2% respectively.

Most regions to experience negative migration

Though all regions will experience net population growth, this is largely as a result of natural increase (births greater than deaths). All regions apart from Dublin and the Mid-East will have negative internal migration (more outward flows from the region than inward flows from other regions). The Border, Mid-West and West regions are the only regions projected to have both negative internal and external migration (emigration). Dublin is the only region projected to increase its population through both positive internal and external migration and through natural increase.

Working age population projected to decline in West and Border

By 2031 the population of working age is expected to increase to 3.3 million nationally up from 3.0 million in 2011. However, not all regions are projected to experience an increase. The West and Border regions are the only regions with a projected decline in the population of working age.

Implications

In the absence of policy change, Ireland's population distribution is projected to become more concentrated in certain regions with particularly strong growth set to occur in Dublin and the Mid-East. This has serious implications for how the country plans for the future, in terms of where economic activity is located and where service provision and investment occurs. The distribution of the population of working age is also projected to become more regionally concentrated, with the West and Border the only regions with a decline in population of working age. This has significant implications for economic growth and development of all regions.

The projected trends are not inevitable and policy direction and effective implementation can alter growth patterns. In particular, policy related to employment and enterprise growth can strongly influence the location of population. The planned new National Planning Framework (NPF) and Regional Economic and Spatial Strategies will be important in developing effective implementation policies to influence where future population growth occurs. The WDC will contribute to this process and will highlight the importance of a more balanced population distribution and the need for a strong economically active population supporting the growth of the Western Region.

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Introduction

The CSO has released regional population projections for the period 2016-2031³. These figures provide a breakdown of the national population projections for the eight regional authority areas and an indication of the likely future population distribution across the country based on current and historical patterns.

This projection of population at a regional level can provide the basis for planning a range of commercial and Governmental activities, from housing policy (as the current housing pressures show) to service provision such as education, health and transport to enterprise location and infrastructure provision such as the deployment of broadband.

It is important to realise that projections are just that and growth patterns can be altered, especially if more effective regional policies are implemented. An example of a changing trend is the internal migration population pattern which changed from a pre-1996 pattern of sustained net migration from the regions to Dublin, to one of net migration from Dublin to the regions evident in 2002 and 2006. This changed pattern was a reversal of the previous more established pattern of net migration from the regions to the capital and arose because of factors including the push factor of very high house prices especially in Dublin and the pull factor of a buoyant labour market around the country.

The projections are based on regional disaggregation of national projections published in April 2013. The various national assumptions regarding fertility, mortality and international migration estimates are 'regionalised' and migration between regions is also considered. This paper provides a brief summary of some of the key figures and highlights some of the issues of special interest to the Western Region.

Though both regional and national population forecasts are subject to considerable uncertainty, the regional forecasts are considered more tentative than national projections given the difficulty in accurately predicting internal migration. The CSO provides six different scenarios for the national population projections based on different mortality, fertility and migration assumptions. The regional projections are based on two of these national population projections (M2F2 and M3F2⁴), with three different internal migration scenarios applied, resulting in six different sets of regional population projections. An expert group examined the basis for different projections and considered that the M2F2 Traditional scenario was the most probable. The analysis by the CSO focuses on this M2F2 Traditional scenario and these figures are discussed here. In Section No.5 there is a brief review of the range of different regional projections arising from all six scenarios.

The M2F2 Traditional variant is based on a slow return to net inward migration⁵, along with steadily falling fertility and a return to the 'traditional' pattern of internal migration. This 'traditional' pattern

³ <http://www.cso.ie/en/releasesandpublications/er/rpp/regionalpopulationprojections2016-2031/#.U9DQF8tOWP8>

⁴ The various population scenarios are based on different migration (M) and fertility (F) assumptions. More detail on these and the mortality assumptions are discussed in http://www.cso.ie/en/media/csoie/releasespublications/documents/population/2013/poplabfor2016_2046.pdf

⁵ A reversal of the pattern of recent emigration.

of internal migration is that pattern observed in the 1980s and 1990s where Dublin and the Mid-East regions had net inward migration, while all other regions experienced net outward migration.

The projections are for the eight Regional Authority areas for 2016-2031. From a WDC perspective the West (Galway, Mayo, and Roscommon), the Border (Donegal, Leitrim, Sligo, Louth, Monaghan, Cavan) and Mid-West (Clare, Limerick, Tipperary North) are of particular interest. All data are drawn from the CSO *Regional Population Projections 2016-2031*.

1.0 Projected Population 2031

The population of the State in 2011 was 4.5 million and it is expected to rise to 5.1 million in 2031⁶, an increase of 613,000 persons (see Table 1). All regions will record a net increase in population, albeit at different rates. The most significant population increase will occur in Dublin and the Mid-East - the Greater Dublin Area – which is projected to grow by 401,400, accounting for 65% of the total projected population growth to 2031.

Table 1 Actual and projected population of Regional Authority areas, 2011 and 2031 (M2F2 Traditional)

Regional Authority area	Population 2011	Population 2031	Total increase	Average annual increase
	Thousands			%
Border	516	533	18	0.2
GDA	1,795	2,197	401	1.0
<i>Dublin</i>	1,262	1,519	257	0.9
<i>Mid-East</i>	534	678	144	1.2
Midland	284	309	25	0.4
Mid-West	378	410	32	0.4
South-East	499	550	51	0.5
South-West	662	733	71	0.5
West	441	456	15	0.2
State	4,575	5,188	613	0.6

Within the GDA, the Mid-East region is projected to grow at a slightly faster rate than Dublin with a projected annual average increase of 1.2% while Dublin is set to grow by 0.9% (on an annual average basis) over the twenty year period.

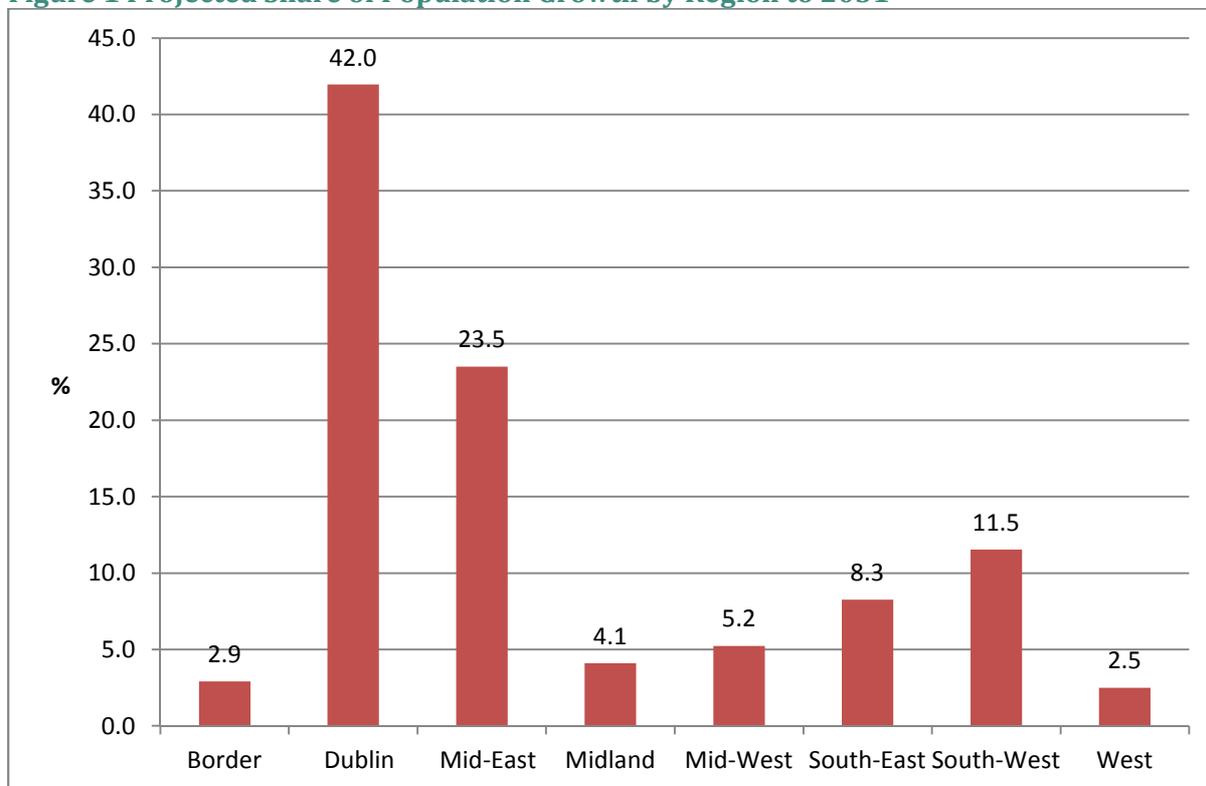
After Dublin and the Mid-East, the highest rates of population growth are predicted to occur in the South-East and South-West regions, both of which are expected to record annual average population growth rates of 0.5%.

The West and Border regions have the lowest projected population growth rates, each with a projected annual average growth rate of 0.2%, so the population of the Border region is expected to grow by 18,000 over the twenty years to 533,000 and the West region is projected to have population growth of 15,000 giving a population of 456,000 by 2031. The Mid-West and Midland regions, which have the second lowest growth rates, both have projected annual average growth rates of 0.4%, double that of the Border and West regions.

⁶ These projections are based on the M2F2 Traditional scenario which is the basis for most of the analysis in the CSO release. <http://www.cso.ie/en/releasesandpublications/er/rpp/regionalpopulationprojections2016-2031/#.U9DQF8tOWP8>

Examining projected population over the entire period to 2031 illustrates the extent to which some regions will grow more than others. Figure 1 below shows the projected share of population growth by region up to 2031.

Figure 1 Projected Share of Population Growth by Region to 2031



It is clear that Dublin and the Mid-East will account for most of the projected population growth (42% and 23.5% respectively). These regions, with the greater share of population in 2011 are also projected to grow the most, especially Dublin and the Mid-East. For example, the GDA population share in 2011 is 39.3% of the national total and it is expected to account for 65.5% of all population growth to 2031, (see Figure 2). In contrast, the Border and West regions are projected to account for just 2.9% and 2.5% respectively of the national population growth to 2031. The impact of the different population levels in 2011, combined with the projected growth to 2031 is illustrated in Figure 2.

2.0 Regional Population Shares

The differing growth rates mean that the population distribution across the country will change compared to that in 2011 as shown in Figure 2. In 2031, the GDA, (Dublin and Mid-East combined), is projected to account for 42.4% of the total population up from the current share of 39.3% in 2011.

All other regions will lose population share under these projections⁷. The Border region's share is set to decline by the most, its national share of population declining by 1 percentage point over the period to 10.3% as shown in Figure 2 below. This is followed by the West with a decline in national population share of 0.8 of a percentage point, so that in 2031 the population share of the West will be 8.8%, down from 9.6% in 2011. The other regions will also record decreases in their national population share although to a lesser degree, for example the South-West and Mid-West both are forecast to have decreases in population share of 0.4 of a percentage point by 2031 while the South-

⁷ Note these figures refer to M2F2 Traditional scenario.

East share of national population will decline by 0.3 of a percentage point and the Midland share will decline the least, by 0.2 of a percentage point.

Figure 2. Regional Population Shares 2011 and 2031



3.0 Components of Population Change

Population change is composed of three elements, natural change (arising from births and deaths), internal migration and external migration. Each of these is discussed separately below.

3.1 Natural Change

3.1.1 Births

The birth rate is derived from the number of women of child-bearing age (15-49 years) and their fertility levels. Fertility is projected to decline across all regions from 2.1 in 2010 to 1.8 in 2026. This declining fertility rate and the forecast decline in women aged 20-39 years⁸, will reduce the total number of births from 74,000 in 2011 to just over 55,000 in 2031, a decrease of 25.8%.

At a regional level, the reduced birth rate combined with the female age distribution particular to each region will impact most in the West (-44.4%), and the Midland regions (-30.7%), followed by the Border region, Mid-West and South-East regions, each with projected declines of -28.0%. The number of births is projected to fall least in the Mid-East region (-10%).

3.1.2 Deaths

The same mortality rate is applied across all regions as there is little regional difference. The differences that do emerge in regional mortality levels relate to the differing age structure of each region. So those regions with a higher share of the population aged 65 years + will have a higher mortality rate than a region with a much lower age profile, but this is because the age structure is older.

⁸ Over 90% of births are to women aged 20-39 years.

Nationally the number of deaths is projected to increase from 28,400 in 2011 to 36,100 in 2031, a 27% rise reflecting the aging population. All regions will experience an increase in the number of deaths. The Mid-East region is projected to experience the greatest percentage increase by 59%, while the Mid-West region will have the lowest rate of increase of 18%. In the West the percentage increase is projected to rise by 24%, and in the Border the rate increases by 19% both lower than the national rate of increase.

3.2 Natural Increase

The natural increase follows from the projected births and deaths. All regions are projected to have a natural increase in population over the period, displayed in Table 2 below. The West region is projected to have the lowest increase in absolute numbers (31,000), followed by the Midland (39,000), Mid-West (43,000) and Border regions (49,000). The regions with the projected largest natural increase in absolute numbers is the Dublin region (188,000), followed by the Mid-East region (110,000).

Table 2 Natural Increase and Migration Projections of Regional Authority Areas, 2011 and 2031 (M2F2 Traditional)

Regional Authority area	Population 2011	Population 2031	Natural increase	Net migration	Total increase
Thousands					
Border	516	533	49	-31	18
GDA	1,795	2,197	298	103	401
<i>Dublin</i>	<i>1,262</i>	<i>1,519</i>	<i>188</i>	<i>70</i>	<i>257</i>
<i>Mid-East</i>	<i>534</i>	<i>678</i>	<i>110</i>	<i>34</i>	<i>144</i>
Midland	284	309	39	-14	25
Mid-West	378	410	43	-11	32
South-East	499	550	58	-7	51
South-West	662	733	80	-10	71
West	441	456	31	-16	15
State	4,575	5,188	598	15	613

Note some may not sum to 100 due to rounding.

3.3 Migration

Migration can be quite variable across regions and is composed of two elements; internal migration (movement between different regions within Ireland), and external migration (that occurring between Ireland and other countries).

3.3.1 Internal Migration

The assumptions on which the most likely scenario is based – the M2F2 Traditional scenario – consider that internal migration will follow the pattern that occurred in Ireland in the period 1986 through to 1996. This was a pattern of net inward migration to Dublin and the Mid-East region from all other regions, in contrast to the migratory patterns in 2002 and 2006 where there was significant out migration from Dublin to all the other regions⁹.

Under this scenario (M2F2 Traditional) all regions apart from Dublin and the Mid-East are projected to lose population to internal migration (Table 3). The greatest losses in absolute numbers are expected to be from the Border region, losing 22,000 persons through migration to other parts of

⁹ The expert group considered that the large movements out of Dublin observed in 2002 and 2006 were unlikely to re-emerge in the short to medium term. It was further felt that the Greater Dublin Area would be the main beneficiary of internal migration over the coming decades but at varying intensity.

the country. The Mid-West and West are set to have a more modest net internal migration loss of 10,000 and 6,000 respectively over the period to 2031.

3.3.2 External Migration

Under the most likely scenario of M2F2 Traditional, there is projected net external migration (emigration) in four of the eight regions, three of which have constituent counties in the Western Region; the West Region (-10,000 or 2.2% of its population in 2011), the Border region (-9,000 equivalent to 1.7% the region's 2011 population) and the Mid-West region (-1,000 or just 0.2% of its 2011 population). The Mid-East region is also projected to experience net external migration (-11,000 equivalent to 2% of its 2011 population). All other regions under the most likely scenario (M2F2 Traditional) will experience a net increase in external migration up to 2031 as shown in Table 3.

Though all regions are projected to have an increase in population, regions are projected to experience different patterns of internal and external migration. Three regions, the Border, Mid-West and West, (all of which have counties within the WDC region) are projected to experience population losses through both internal and external migration. Other regions are set to experience net migration loss through either internal or external migration flows but not both, apart from the Border, Mid-West and West regions.

Table 3 Migration projections of Regional Authority Areas, 2011 and 2031 (M2F2 Traditional)

Regional Authority area	Internal migration	External migration	Total Migration	Population 2031
Thousands				
Border	-22	-9	-31	533
GDA	92	11	103	2,197
<i>Dublin</i>	47	23	70	1,519
<i>Mid-East</i>	45	-11	34	678
Midland	-21	7	-14	309
Mid-West	-10	-1	-11	410
South-East	-16	9	-7	550
South-West	-18	8	-10	733
West	-6	-10	-16	456
State	0	15	15	5,188

3.4 Total Net Change

The total net change (2011-2031) is based on the natural increase and net internal and external migration. Under the most likely scenario, the population of all regions is projected to grow due to natural increase but as Table 2 shows the total net increase to 2031 will vary by region from 15,000 in the West to 257,000 in the Dublin region.

All regions are projected to have a pattern of natural increase greater than the losses through migration. This is most noticeable in the Border region with a natural increase of 49,000 outnumbering the net outward migration, providing for a net increase of 18,000 up to 2031. The West region follows a similar pattern, the projected natural increase of 31,000 is higher than the population declines from net internal (-6,000) and external (-10,000) migration. The Mid-West region similarly is forecast to experience a natural increase of 43,000, outnumbering the net loss through internal migration (-10,000) and the relatively small net loss through external migration (-1,000).

4.0 Age structure

The age structure of the population is shown by examining the numbers in each of three age groups, the young (0-14 years), the old (65 years and over) and those aged 15-64 years – the population of working age. Consideration of the trends within and between these broad age groups is a useful indicator in measuring potential economic activity, as generally the young and old are not economically active and are considered ‘dependent’ on the third group, those of working age.

4.1 Young

Nationally, the number of young persons is projected to increase up to 2021, after which the numbers in this age group are expected to decline. This pattern occurs in all regions though the numbers of young start to decline earlier, from 2016, in the Border and West regions.

Nationally the young dependency ratio (those aged 0-14 as a percentage of those aged 15-64) was 31.9% in 2011 and is expected to rise to 34.7% in 2016. In the West the share is 31.7% rising to 34.6% in 2016. In the Border the share of the population aged 0-14 years is 34.6% rising to 35.8% in 2016.

By 2031, the share of each region’s young population declines so that the proportion in the West region is down to 24.6%, lower than the national average of 26.9%. The share in the Border region is 27.3%. The region with the highest youth dependency in 2031 is projected to be the Mid-East region (31.5%), with all other regions having less than a 30% share. This has implications for education provision as well as the size of the emerging labour market in each region.

Table 4 Young Dependency Ratios by Regional Authority Areas, 2011, 2016, 2031

Region	2011	2016	2031
	%	%	%
Border	34.6	35.8	27.3
GDA	30.3	34.2	25.8
<i>Dublin</i>	27.9	31.9	23.5
<i>Mid-East</i>	36.2	39.6	31.5
Midland	35.6	37.6	29.4
Mid-West	32.2	34.6	27.5
South-East	33.4	35.0	29.0
South-West	31.3	34.0	28.3
West	31.7	34.6	24.6
State	31.9	34.7	26.9

4.2 Old

Nationally and across each region, the numbers aged 65 years and over is projected to increase continuously and in 2031 there will be over 990,000 aged 65 years and over in the state. Across each region the numbers in this age group will almost double over the twenty year period. As a proportion of the population of working age, the old dependency ratio¹⁰ is set to rise from 17.3% nationally in 2011 to 30.0% in 2031. This has implications for service provision especially in the health sector and for economic activity, employment and patterns of consumption of goods and services.

At a regional level, the Border and West regions are projected to have higher than average old dependency ratios increasing from 19.3 % and 19.6% respectively in 2011 to 34.9% in the Border and 35.1% in the West by 2031, both considerably higher than the national average. Those regions

¹⁰ Those aged 65 years and over as a percentage of those aged 15-64.

projected to have the lowest old dependency ratios in 2031 are the Dublin region (24.2%) and the Mid-East region (26.5%), due to a projected increase in the younger population in the Mid-East as well as internal migration to the Mid-East and Dublin from other regions.

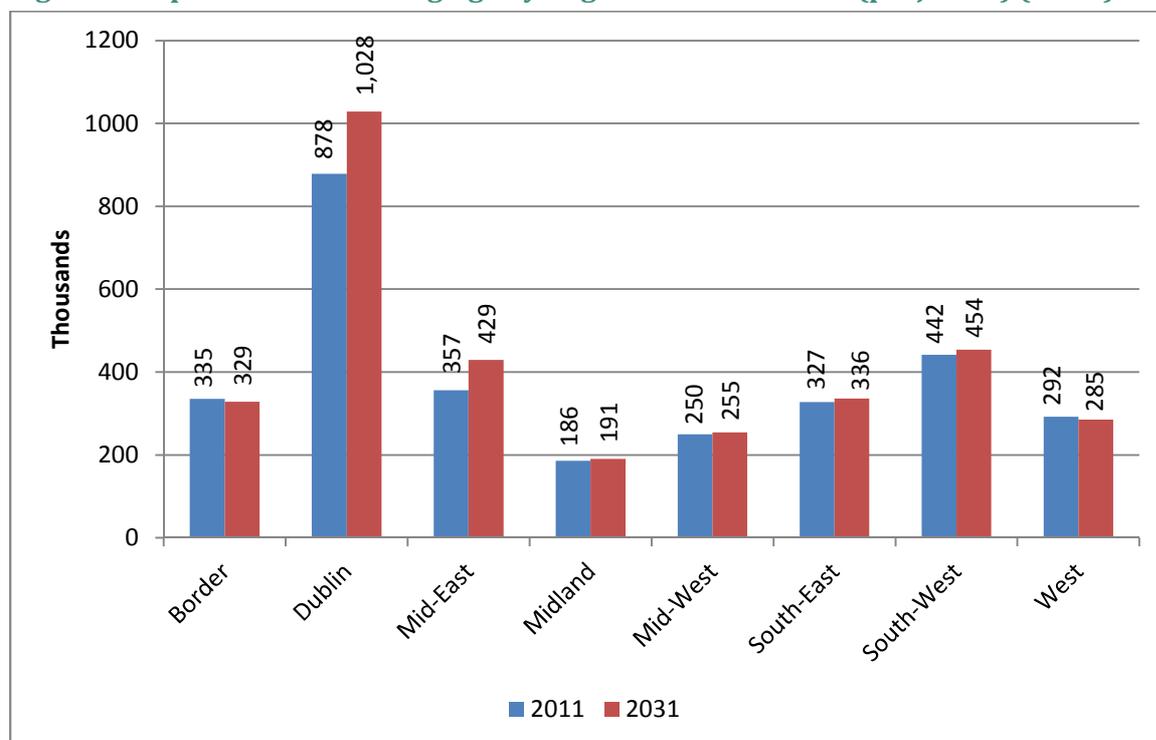
Table 5 Old Age Dependency Ratios by Regional Authority Areas, 2011, 2016, 2031 (Projected)

Region	2011	2016	2031
	%	%	%
Border	19.3	22.6	34.9
GDA	15.1	18.1	24.9
<i>Dublin</i>	15.8	18.5	24.2
<i>Mid-East</i>	13.5	17.0	26.5
Midland	17.1	20.2	32.4
Mid-West	18.8	23.0	33.4
South-East	19.0	22.5	34.6
South-West	18.6	22.2	33.1
West	19.6	23.5	35.1
State	17.3	20.7	30.0

4.3 Population of Working Age

A key factor in the dependency ratios is the relative size of the population of working age. By 2031 the population of working age will have increased to 3.3 million nationally up from 3.0 million in 2011. However not all regions will experience an increase in the population of working age under the M2F2 Traditional scenario. Two regions, the West and Border regions are expected to see a decline in the population of working age between 2011 and 2031 as illustrated in Figure 3 below. In the West the decline will be from 292,000 in 2011 to 285,000 in 2031, while in the Border region the decline is from 335,000 in 2011 to 329,000 in 2031.

Figure 3. Population of Working Age by Region 2011 and 2031 (projected) ('000s)



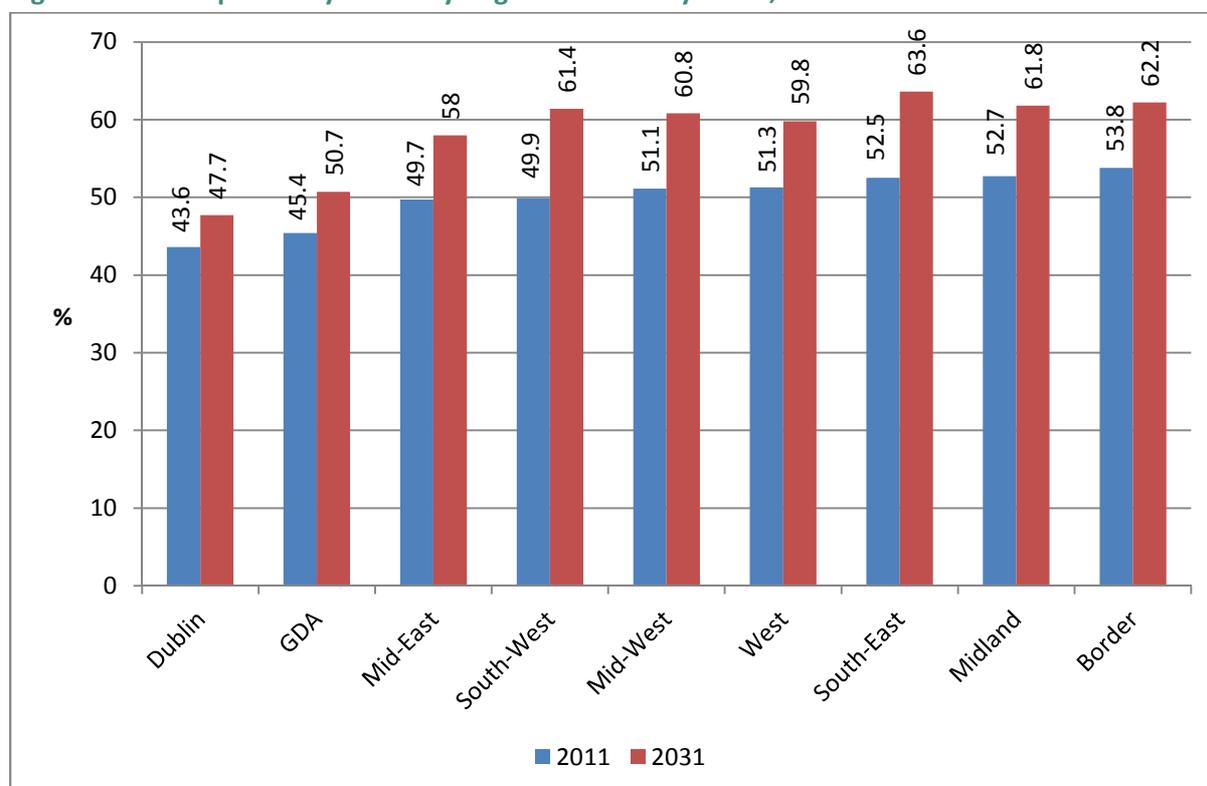
4.4 Total Dependency Ratio

Total dependency ratios (those aged 0-14 plus those aged 65 years and over as a percentage of those aged 15-64) are projected to increase across all regions. By 2031 the national total dependency ratio is expected to be 56.8% up from 49.2% in 2011. The regions with the highest dependency ratio are projected to be the South-East region, at 63.6% and the Border region, 62.2%. The Dublin region will have the lowest total dependency ratio in 2031(47.7%), indicating that it is likely to be the most economically dynamic region. The total dependency ratio in the West is projected to be (59.8%) and in the Mid-West is projected to be 60.8%.

Table 6 Total Dependency Ratios by Regional Authority Areas 2016, 2031

Region	2011	2031
	%	%
Border	53.8	62.2
GDA	45.4	50.7
<i>Dublin</i>	43.6	47.7
<i>Mid-East</i>	49.7	58.0
Midland	52.7	61.8
Mid-West	51.1	60.8
South-East	52.5	63.6
South-West	49.9	61.4
West	51.3	59.8
State	49.2	56.8

Figure 3 Total Dependency Ratios by Regional Authority Areas, 2011 and 2031



5.0 Different Scenarios

The six different sets of regional projections are based on two national population projections ranging from 4.895 million (M3F2) to 5.188 million (M2F2), each with three different internal migration and births pattern applied¹¹. The data examined throughout this report refers to the M2F2 Traditional scenario, considered the most likely. In this section the range of outcomes under the other scenarios are briefly reviewed.

The Dublin and Mid-East regions are projected to increase under all scenarios. In Dublin, the projected population increase ranges from 96,000 to 286,000 and the population of the Mid-East is set to increase by between 78,000 and 144,000.

For the three regions within the Western Region, under some scenarios population is projected to decline. For the West region, the population is projected to decline under three of the six scenarios and where population is set to increase; the highest projected figure is 21,000. For the Border region, four of the six scenarios project a net increase in population of up to 40,000. Negative external and internal migrations are both important factors in the projected population decline under these scenarios. The Mid-West is projected to increase its population under five of the six scenarios with a net increase of up to 32,000.

6.0 Implications of population projections

Though all regions are set to experience population growth, Ireland's population is projected to become more concentrated in two regions, Dublin and the Mid-East – the GDA. The share of the national population located in the GDA is expected to increase from 39.3% in 2011 to 42.4% of the total population in 2031.

It is also clear that the distribution of the population of working age and particularly those who are economically active will become more concentrated. The trends over the long-term indicate that Dublin, the region with the lowest dependency ratio in 2031 (47.7%), will be set for further significant population growth relative to other regions. From a Western perspective, the West and Border regions are the only regions with a projected decline in the population of working age.

The significant population growth projected for the GDA in particular and the consequent requirement for investment to support this growth will require additional resources. It is important to understand the factors behind the projected trends as well as to realise the implications of long-term trends, both to anticipate and plan for change and also to influence a change in growth patterns if this is deemed desirable.

For example, the current housing crisis, particularly in Dublin, has focused on the problems of housing supply there. While increased supply is part of the response, there is a danger that the debate is concentrated on resolving the 'supply' issue in Dublin in isolation from other related factors, such as the concentration of employment opportunities in the capital. These are reasons why there is an ever increasing share of population growth in the GDA. Key issues such as the location of enterprise and employment opportunities influencing residential demand should be central to the debate. The more narrow focus risks losing sight of the bigger, more long-term questions such as where population growth should occur and what policy responses are required to support it.

¹¹ The figures for deaths and external migration largely do not differ by region for each of the two national projections. Regional population projections are based on two different sets of national population projections. The CSO have compiled a set of six different national population projections available at http://www.cso.ie/en/media/csoie/releasespublications/documents/population/2013/poplabfor2016_2046.pdf

The WDC believes there is a need to question the desirability of the trend of a greater share of the national population living in the GDA, not just in terms of impacts such as regional equity and more balanced regional development, but also in examining the costs associated with managing and facilitating a greater share of the population living and working there. For example, costs arising from large scale transport infrastructure projects required to facilitate mobility in the capital are considerable, while there are costs associated with not investing in the potential of other regions.

The planned new National Planning Framework (NPF), the successor to the National Spatial Strategy, is expected to be developed next year. This and the new Regional Economic and Spatial Strategies will be important in considering future population growth, where it should and will occur and devising policies to ensure effective implementation.

However effective implementation will require commitment and drive at national and regional levels across the full range of policy areas, starting with an effective planning framework and encompassing the full range of sectoral policies including transport, telecommunications, education and employment policies.

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