

OPPORTUNITIES IN IRELAND / May 2020

INFRASTRUCTURE SECTOR



OFFICIAL PROGRAMME



PARTNER



OPPORTUNITIES IN IRELAND INFRASTRUCTURE SECTOR

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1. Introduction

1.1. STUDY GOALS AND OBJECTIVES

The Swiss Business Hub (SBH) in London is responsible for exports to the UK and Ireland. Swiss companies in the past have mainly looked at the UK to export, but due to the challenges of BREXIT, the SBH wanted to look at the opportunities in Ireland.

The Irish government announced €116 billion investment in infrastructure from 2018 to 2027, and the SBH wants to understand where that €116 billion is going to be spent.

1.2. INTENDED AUDIENCE

The SBH wants to present to Swiss SMEs a report that shows the business opportunities of the Irish market. The SBH works with SMEs that have innovative products/ services/ technologies with a unique selling point.

1.3. LIMITATIONS AND CHALLENGES OF STUDY

The limitations of the study are the unknown impact of COVID-19. When the report was commissioned, COVID-19 had not reached Ireland and there was no suggestion that it would impact Ireland so devastatingly. As the report is being finalised, Ireland is still in lockdown. Part of the report is based on primary research, but due to the COVID-19 pandemic and the majority of people working from home, it was much more difficult to reach industry experts, especially those focused on solving issues caused by the pandemic.

1.4. APPROACH AND METHODOLOGY

The reports are based on primary and secondary research. The primary research was conducted with Key Opinion Leaders (KOL) and industry experts. The research focused on finding out the potential opportunities for different sectors (check www.s-ge.com to view other sector reports) and trying to understand how the COVID-19 pandemic will affect that sector. In trying to understand the impact of the pandemic the reports look at how the 2008-2012 recession affected Ireland and how these sectors coped with the recession. A large part of this report is based on primary research. Those involved in the research will not be named.

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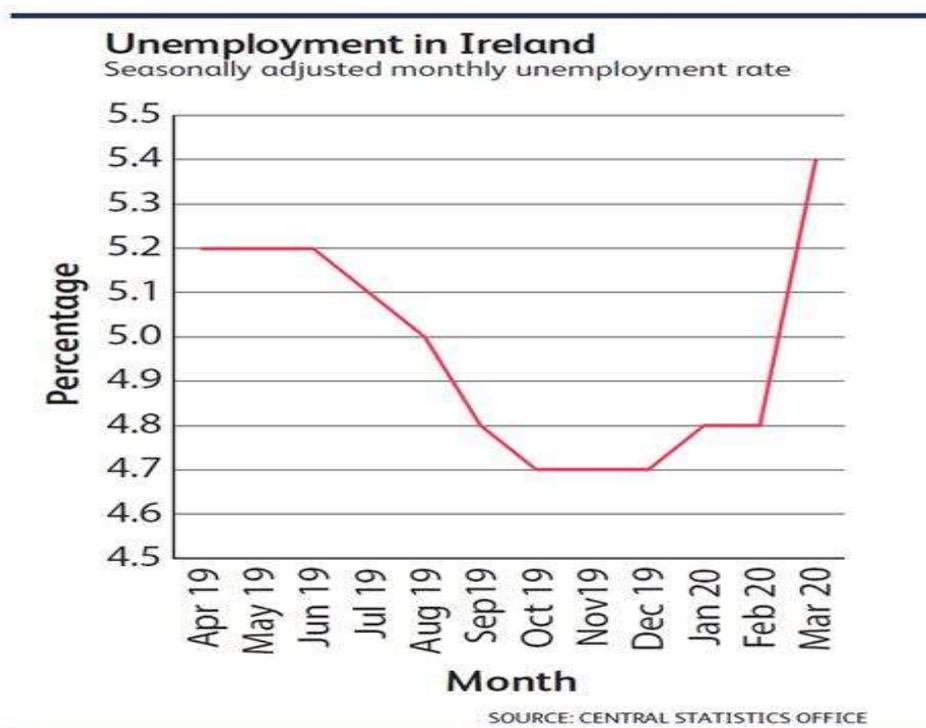
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2. The Infrastructure Sector in Ireland

We need to radically change how we deliver infrastructure in this country (source: Enhancing Ireland's Infrastructure, Construction Federation Report August 2017).

The economy in Ireland grew by 4.2% in 2019 and was expected to grow by 3.2% in 2020. In GDP terms, the growth was 6.7% in 2018, 4.8% in 2019 and 3.7% in 2020. The labour market in late 2019/early 2020 continued to move towards full employment with the unemployment rate below 5% in 2019 and 2020. However, these figures and projections were before the onset of the COVID-19 pandemic which has seen the unemployment rate soar to 16.5% in late March 2020. The OECD has projected that the Irish economy could shrink by 15% (Germany -25% & UK -26%). However, this all depends on the restrictions and when and how they are lifted.

Figure 1. Unemployment in Ireland



In the aftermath of the 2008 economic collapse, Ireland's public infrastructure spending was severely curtailed and capital investment was slashed to 2.5% of GDP. The result was an infrastructural deficit which was failing to keep step with the country's rapid growth and potentially hindering Ireland's competitiveness and performance into the future.

Hence, the Irish government announced €116 billion investment in infrastructure until 2027. The National Development Plan (NDP) was created to show where the Irish government would spend this money.

Figure 2. Priorities for NDP Expenditure

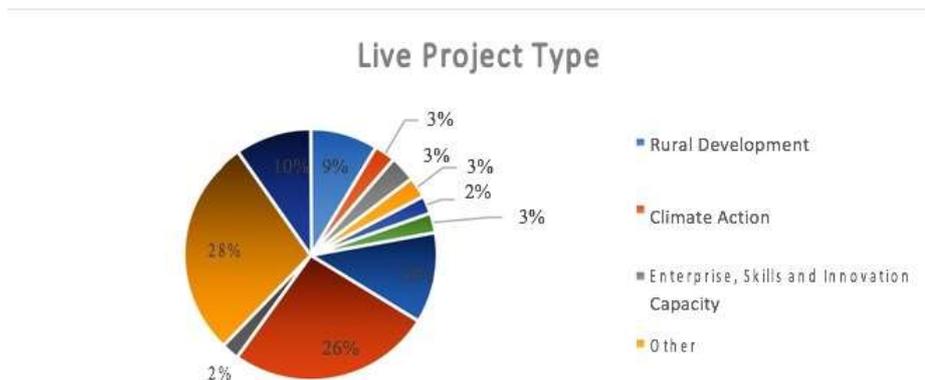
Priorities	Investment
Energy & Climate Change Projects	€21.8 Billion
Social Housing	€11.5 Billion
Healthcare	€10.9 Billion
Roads	€10.2 Billion
Enterprise Innovation & Skills	€9.4 Billion
Water Resource Management	€8.8 Billion
New Schools	€8.4 Billion
Airports & Ports	€4.3 Billion
Dublin Metrolink	€3 Billion
Third Level Education	€2.2 Billion
Dart Extension	€2 Billion
Rural Regeneration	€1 Billion
Cultural Infrastructure	€725 Million
Disruptive Technologies	€500 Million

The COVID-19 pandemic will impact this plan. Whether the government has learnt a lesson from the last recession is yet to be seen, as the belief that a reduction in public expenditure, as happened in the 2008 recession, was counter-productive and left Ireland with inferior infrastructure to other European countries.

The challenge of this report is to try and understand where the government is most likely to invest.

From Figure 2, the priorities for the NDP can be seen but to give a better understanding of the types of projects that are underway, please see Appendix. Whilst current investment may not reflect future investment, it gives a good overview of exactly what projects Ireland invested in pre-COVID-19. Below in Figure 3 is the breakdown of the live projects in Ireland.

Figure 3. Live Infrastructure Projects Q1 20



2.1. CLIMATE ACTION

In discussion with the Key Opinion Leaders (KOLs) in the construction industry, they feel that infrastructure projects would undoubtedly be affected. As this report is being written, a government is being formed with the possibility of the Greens participating. This participation would come with an understanding that there will be a commitment to reducing the Irish

carbon footprint by 7%, which is significantly higher than projected, hence if the Greens do enter into government, a significant investment into climate action will be agreed. In Figure 3, live climate action projects are the second largest project group.

2.2. SOCIAL HOUSING

Housing is currently a major issue in Ireland. It is arguably the biggest social and economic issue facing Ireland (pre-COVID-19). Home ownership in Ireland has dropped, evictions and homelessness have climbed sharply. Surging demand for rental units has led to a shortage of rental properties and rents soared over the last seven years. Dublin has become one of the world's most expensive places to rent.

There were 10,148 people **homeless (adults and children)** in the week of **17th February 2020** across Ireland. The number of homeless families has increased by 275% since February 2015 (source: Focus Ireland).

Ireland is delivering 20% less social housing than needed (Dail Housing & Homeless Committee 2018). The housing problem was one of the core issues in the February 2020 election. COVID-19 is not going to change the housing problem in Ireland. Whether the government will commit to €11 billion to social housing over the next few years is doubtful but what is interesting about Figure 2 is that social housing is the number two priority.

2.3. METROLINK

Dublin is one of the few metropolitan cities in Europe with no underground railway. One of the biggest single projects planned for Project 2040 was the MetroLink. This is the proposed high-capacity, high-frequency rail line running from Swords to Charlemont, linking Dublin Airport, Irish Rail, DART, Dublin Bus and the Luas services, creating fully integrated public transport in the Greater Dublin Area. It is a fully automated metro line.

Much of the nineteen-kilometre route will run underground, an exciting innovation for Irish public transport. MetroLink is projected to carry up to 50 million passengers annually and hopefully decrease congestion and pollution in Dublin city. €3 billion has been earmarked for the MetroLink project but the KOLs believe that the cost has been significantly underestimated. However, they believe that the building of MetroLink is key to Ireland's future and should continue to be realised, despite COVID-19. Also, during a recession, the KOLs feel that it is a good time to do large projects as contractors are hungry for projects, there is a good supply of labour and fewer people are travelling.

There is a good opportunity here for Swiss companies that have metro knowledge and technology, as Ireland has little experience in this area and hence there are virtually no companies that specialise in it. The KOLs recommend that Swiss companies with metro skills and technology, especially tunnelling - as a considerable part of this project is underground - should contact and build relationships with the civil construction companies such as Arup, Atkins, Mott MacDonald, Aecom, Balfour Beatty etc. The other companies that are involved in automated metro lines can be found below.

Suppliers of fully automated metro lines:

- Siemens
- Bombardier
- Hitachi
- Alstom
- CAF
- CRRC Qingdao Sifang Co Ltd
- Changchun Railway

Please note that all Infrastructure projects must abide by EU rules and regulations. The notice from TII was posted in the Official European Journal (OEJ) on 9th November 2019 (TED reference 2019/S 218-536230), but there is still time to participate in this stage.

The Department of Expenditure & Reform has a bad track record on productivity on big infrastructure projects (for example the National Children's Hospital), and hence it encourages large infrastructure projects to be done as a joint venture with one

company having a very strong track record in construction technology, design or project management. The MetroLink project is under the auspices of Transport Infrastructure Ireland www.tii.ie. See Appendix for contacts.

Other companies to contact for this project:

SNC Lavalin – consultants to TII for MetroLink www.snclavalin.com

Jacobs Engineering and Idom (joint venture) – also design of the MetroLink (please see Appendix)

2.4. DART EXTENSION

Another project that the KOLs feel was imperative is the DART extension. The DART is the suburban train that runs from one end of Dublin Bay to the other. The DART comes under the auspices of Irish Rail.

The plan is to extend the DART to Maynooth, Hazelhatch and Drogheda. For most of this project, there is no need for new railway tracks. The main element of the project is focusing on electrification of the line. Any company that has technology in this area could be of interest to Irish Rail.

Irish Rail is also currently reviewing the national maintenance programme for the whole country. Here they will be looking at everything from sub-stations to transformers. Irish Rail does have to abide by EU rules and regulations but they like to meet with potential sub-contractors, as once the main contract has been awarded they work closely with them and have a big influence on the choice of sub-contractors.

Companies that can offer expertise in rail technology and design have a good opportunity to enter the Irish market. www.irishrail.ie. See Appendix for contacts.

2.5. ROADS

Roads come under the responsibility of Transport Infrastructure Ireland (TII) and the view is that the Swiss could be well placed to supply technology into the road infrastructure projects (cameras, lighting, electric innovation etc.) Figure 2 shows considerable investment in roads and whilst that investment will probably decrease due to the COVID-19 pandemic, investment in Irish roads is necessary as Ireland's population is set to grow to 5.4 million by 2024 (source: CSO). According to the Construction Ireland Federation (CIF), the capital stock of roads has been in decline since 2013. This is clearly an unsustainable trend, particularly given Ireland's strong economic and population growth, which it is hoped Ireland will return to post-COVID-19 pandemic. www.tii.ie. See Appendix for contacts.

2.6. AIRPORTS & PORTS

Dublin Port has projected a decline (approx. 5%) in goods coming into Dublin Port, so the Port investment may be delayed. However, the second runway at Dublin Airport is well underway and hence the investment will need to be completed; as it is in the early phases of development, there could be opportunities. www.daa.ie, www.dublinport.ie

2.7. WATER

Until very recently, Ireland had a different approach to payment for water and wastewater services than every other country in the OECD. In every OECD country, water services are paid for partly by public funding and partly by water charges levied on households. However, the timing of the move to introducing water charges in Ireland was an issue. Coming at a time of austerity, it was easy to depict water charges as a by-product of austerity, just another tax imposed on a weary population. The populace felt that they were double-paying a tax on water. The payment for water was such a toxic issue that it nearly brought down the government. The importance of this story is that Irish households do not pay for water and hence there has been little investment in Irish water infrastructure. This leaves Irish Water (the state agency created when water charges were briefly introduced and then retracted) with an infrastructure not fit for purpose and without the real budget necessary to resolve the water infrastructure problems. Boil notices in many parts of Ireland including Dublin are not uncommon. Raw sewage entering Dublin Bay is a frequent problem. Water infrastructure will have to remain quite high on the list of priorities because of the

need to protect the environment, a human right to have fresh water, and because the infrastructure needs to be updated. www.water.ie

Reasons why water infrastructure will remain a high priority:

- Ireland loses almost 50% of expensively treated clean water before it even makes it to our taps through leakage.
- In November 2019, 600,000 people in Dublin were on boil water notices for two weeks.
- 121 water treatment plants which serve nearly one million people require major upgrading to avoid the risk of contamination.
- More than one in every three Irish water treatment plants have insufficient capacity. They are just not big enough to treat all the raw sewage that goes through them.
- Dublin is operating with 2% spare capacity, and demand for water in Dublin is forecast to increase by 50% by 2050. Highly disruptive water shortages in Dublin have recently cost in excess of €78m per day.
- Two-thirds of the sewer network is in need of repair.
- On average, Irish water infrastructure is twice as old as the European average and Ireland has pipes dating back to the 19th century.

The areas of interest for innovation in Irish water are the following:

- Fixing leaks
- Ensuring drinking water quality / testing
- Building infrastructure and upgrading current infrastructure / wastewater treatment plants
- Wastewater

There is no indication that the budget for Irish water is to be cut. However, once the new government is installed, they will look at all budgets. The challenge for the new government is whether they continue with the agreed investment in the water infrastructure or pay heavy EU fines.

As discussed earlier in the report, Ireland already has a housing issue and housing needs water infrastructure.

COVID-19 should mean that as budgets are curtailed, strategic infrastructure projects will be subject to robust cost-benefit analysis and economic modelling. This should help to identify projects that deliver optimal benefits to Ireland's economy. Therefore, water projects should remain on the priority list of infrastructure investments. See Appendix for contacts.

2.8. INFRASTRUCTURE INVESTMENT

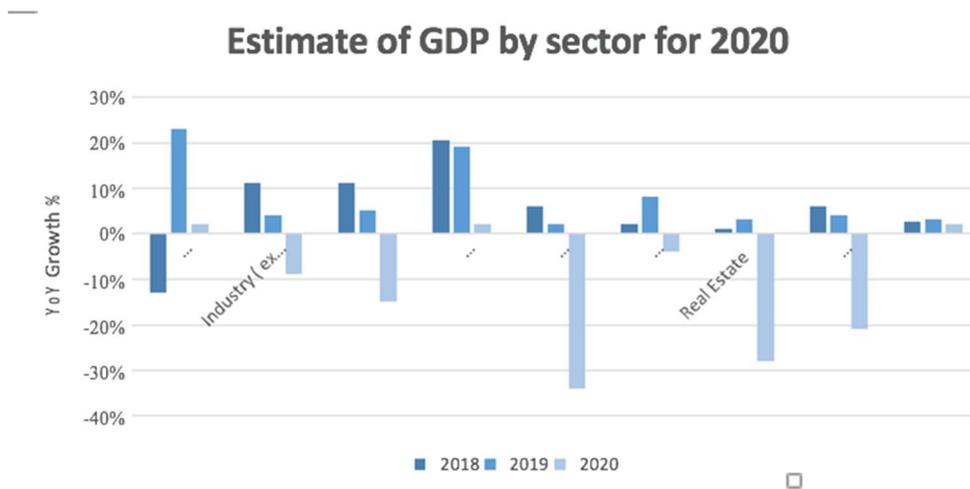
Industry experts & KOLs feel that the government must continue to invest in infrastructure. Infrastructure is a key component of Ireland's success. They feel that it will be an important determinant of economic growth and competitiveness to help Ireland move out of the probable recession caused by the COVID-19 pandemic. Investment in high-quality infrastructure adds to the productive potential of the economy and can boost productivity and reduce inefficiencies, whilst also supporting jobs and improving the quality of life for all residents.

Hence, it is not easy to foresee what changes the government will make to its National Development Plan. The hope is that the government has learned from the 2008-2012 recession and that Ireland must invest in its infrastructure in order to remain a strong European economy. With COVID-19, some of the priorities will definitely change. The government will re-prioritise and look at the benefits delivered. The KOLs feel that the following areas will remain high on the priority list:

- Climate Action
- Housing
- Dart Extension
- MetroLink
- Roads
- Water

Figure 4 looks at GDP by sector and it is evident that the construction sector will be significantly hit. In 2020, it is estimated that there will be a 15% decrease in GDP in the construction sector. The question is in which construction sector that decrease will be most felt. In the recession of 2008 -2012, the public sector new construction output declined by 6% and 12% in 2009 and 2010 respectively, whilst the private sector change in volume output declined by 60% and 64% respectively.

Figure 4. Estimate of GDP by sector for 2020 (source: Central Statistics Office CSO)



The Top 50 construction companies in Ireland had a turnover of €8.39 billion (please see Appendix).

Below are listed some of Ireland’s top civil construction companies:

- Sisk
- BAM Ireland
- John Paul Construction
- SIAC Construction
- Murphy International
- PJ Hegarty
- Roadbridge
- John Craddock
- Collen Construction

In the Appendix, there is also a list of contacts for the top construction companies as well as the civil construction companies.

2.9. PROCUREMENT & SUB-CONTRACTING

Irish companies are very keen to work with innovative and professional foreign companies and it is believed that collaboration is the most effective way to ensure projects are finished on time and within budget.

All works and works-related contracts in excess of €50,000 are published on:

<https://www.etenders.gov.ie/>

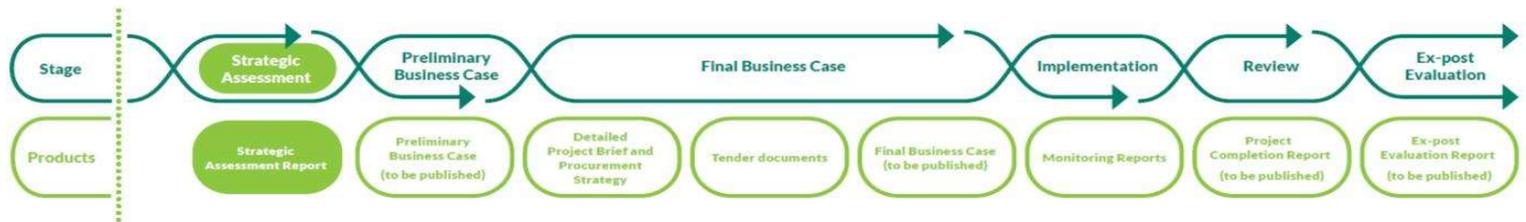
In the discussion with the Construction Industry Federation about sub-contracting, they said that Swiss companies need to be aware of the Construction Contracts Act 2013.

The solution for anyone engaging in construction is:

1. **Get a copy of your contract** and if you need help, get help to **make sure that you understand** what the terms and conditions are.
2. Check what the **requirements are around payment claim notices**.
3. Check what the requirements are around **change notification for both time and cost**.

Project Life Cycle

Figure 5. Department of Public Expenditure and Reform



The above diagram explains the various stages of infrastructure projects as they progress through the system. Understanding the flow of a project in Ireland will ensure that Swiss companies are in the right place at the right time.

Swiss companies who have relevant technologies/products/services should contact the relevant companies (see Appendix), but could also contact entities such as Irish Water, to help point them in the right direction.

2.10. IRISH CONSTRUCTION INTELLIGENCE

www.cisireland.com

CIS is an online service that allows a company to pinpoint and identify where the opportunities are emerging in the construction sector.

The search function allows you to identify upcoming projects that are in your sector. A weekly email alert ensures that an opportunity is never missed. The service shows planned projects, projects granted, ready-to-go projects and onsite. It shows the various organisations involved in the project and the contact details. It costs approx. €1100 for an annual subscription (one user).

3. Conclusion

The COVID-19 pandemic will probably affect the National Development Plan. Firstly, it all depends on the Irish government exit plan and whether they have learned lessons from the last recession. Infrastructure is key to Ireland's future and all the KOLs agree. The issues are: how Ireland emerges from the COVID-19 crisis; how it restarts the economy; and whether it understands the need to upgrade its infrastructure in order to repair the economy as fast as possible.

Swiss sub-contractors do not have to deal with the inefficiencies of the Irish infrastructure public procurement but they do need to be careful when choosing who to work with and have a good understanding of the Construction Contracts Act 2013.

With the two rail projects that should go ahead despite the COVID-19 pandemic, there are considerable opportunities for companies with niche/expert skills and technology. Housing will remain an ongoing investment and due to the state of the Irish water infrastructure, again there will be opportunities for companies who have innovative technology and niche skills. Climate action projects will probably remain on the list of priorities.

The OECD believes that Ireland will have one of the mildest declines in economic activity in Europe, and because Swiss companies have technology in the area of rail, water, roads and climate action, there should be good opportunities for the right Swiss companies despite the COVID-19 crisis.

4. Appendix

Top 50 construction companies

1. John Sisk & Son	Wilton Works, Nass Road, Dublin 22
2. Mercury Engineering	Mercury House, Ravens Rock Road, Sandyford Business District, Dublin, D18 XH7
3. BAM Ireland	Kill, Co. Kildare, W91 KH3E
4. Jones Engineering	Jones Engineering House, 83 Penbroke Rd, Dublin 4, D04 HN50
5. Bennett (Construction) Ltd	Bennett (Construction) Ltd., Forest Park, Mullingar, Co. Westmeath, Ireland.
6. John Paul Construction Ltd	Dundrum Business Park, Dundrum Rd, Farnboley, Dublin
7. Dorman Engineering Ltd	10 Eastgate Avenue, Eastgate, Little Island, Cork T45 PC63
8. JJ Rhatigan & Company	Wolf Tone House, Fr Griffin Road, Galway, H91 PW72
9. P J Hegarty & Sons U.C.	P.J. Hegarty & Sons, Davitt Road, Inchicore, Dublin 12, D12 CH22
10. Collen Construction	Collen Construction Ltd., Rivehouse, East Wall Road, Dublin 3, D03 P7Y5
11. Winthrop	
12. Roadbridge Ltd	Crossagalla, Ballysimon Road, Limerick, V94 X2E1
13. Designer Group Engineering Contractors Holdings Ltd	
14. mac-group	
15. Walls Construction Ltd	
16. Kirby Group Engineering	
17. Ardmac Limited	
18. Specialist Technical Engineering Services (STS Group)	
19. Flynn	
20. Suir Engineering	
21. Stewart Construction	
22. Murphy International Ltd	Great Connell, Newbridge, W12 HD61, Co Kildare
23. Wills Brns Ltd	
24. SIAC Construction	Dolcain House, Monastery Road, Clondalkin, Dublin 22, D22 F8 F5
25. Leo Lynch Group	
26. Keating	
27. Duggan Brothers (Contractors) Ltd	
28. Ganson Building & Civil Engineering Contractors Ltd	
29. Monami Construction	
30. GEM Group	
31. ABM Group	
32. BMD & Company Limited	
33. Radley Engineering	
34. King & Moffatt	
35. Kilcawley Construction	
36. Gaeltec Utilities Limited	
37. Glenman Corporation Ltd	
38. Conack Construction Ltd	
39. Lynskey Engineering Ltd	
40. Adison Group Holdings Ltd	
41. Clancy Construction	
42. Purcell Construction	
43. Jons Civil Engineering Co Ltd	
44. Vision Contracting Ltd	
45. P J Carey Contractors Ltd	
46. MSI Engineering Ltd	
47. Glenbeigh Construction Limited	
48. T&I Fitouts Ltd	
49. MMD Construction Cork Ltd	
50. David Flynn Ltd	
John Craddock	Unit 5, Kilcullen Business Campus, Kilcullen, Co. Kildare, Ire

Turnover

1. John Sisk & Son	00
2. Mercury Engineering	00
3. BAM Ireland	00
4. Jones Engineering	00
5. Bennett (Construction) Ltd	00
6. John Paul Construction Ltd	00
7. Dorman Engineering Ltd	00
8. JJ Rhatigan & Company	00
9. P J Hegarty & Sons U.C.	00
10. Collen Construction	00
11. Winthrop	00
12. Roadbridge Ltd	65
13. Designer Group Engineering	62
14. mac-group	00
15. Walls Construction Ltd	00
16. Kirby Group Engineering	00
17. Ardmac Limited	78
18. Specialist Technical Engine	13
19. Flynn	00
20. Suir Engineering	00
21. Stewart Construction	00
22. Murphy International Ltd	00
23. Wills Brns Ltd	00
24. SIAC Construction	00
25. Leo Lynch Group	00
26. Keating	58
27. Duggan Brothers (Contract	00
28. Ganson Building & Civil Eng	04
29. Monami Construction	16
30. GEM Group	00
31. ABM Group	00
32. BMD & Company Limited	09
33. Radley Engineering	00
34. King & Moffatt	00
35. Kilcawley Construction	00
36. Gaeltec Utilities Limited	00
37. Glenman Corporation Ltd	00
38. Conack Construction Ltd	00
39. Lynskey Engineering Ltd	14
40. Adison Group Holdings Ltd	03
41. Clancy Construction	00
42. Purcell Construction	00
43. Jons Civil Engineering Co Li	00
44. Vision Contracting Ltd	00
45. P J Carey Contractors Ltd	11
46. MSI Engineering Ltd	71
47. Glenbeigh Construction Lim	07
48. T&I Fitouts Ltd	00
49. MMD Construction Cork Lt	12
50. David Flynn Ltd	00

Water and other contractors

Name of Company	Address
Ward & Burke Construction Limited,	Stradbally East, Kilcolgan, Co. Galway, H91 W279
Tobins Consulting	Block 10-4, Blanchardstown, Blanchardstown Corporate Park, Dublin 15
GMC Utility Group	GMC House, Millenium Business Park, Cappagh Road, Dublin 11, D11 ERD2
Ryan Hanley	170 Ivy Exchange Granby Place, Parnell Square W, Dublin 1, D01 N938
BAM Ireland	Kill, Co. Kildare, W91 KH3E,
Jacobs Engineering	Merrion House, Merrion Road, D04 R2C5
Nicholas Dwyer	Nutgrove Office Park, Unit 4E, Nutgrove Ave, Dublin, D14 V3F6
RPS Group	First Floor, Motor City, Kylesmore Road, Dublin, D12 TFR7
Arup Ireland	50 Ringsend Rd, Dublin, D04 T6X0

Autometro suppliers

Suppliers of Fully Automated Metro lines.
Siemens
Bombardier
Hitachi
Alstrom
CAF
CRRC Qingdao Sifang Co Ltd
Changchun Railway

Infra projects (source: Department of Public Expenditure and Reform)

Project Ireland 2040 | Infrastructure Pipeline

Table 6: Water Projects

	Name of Project	Stage of Project Lifecycle(1-6)	Construction Completion	Cost Range
1.	Water Supply Project – Eastern and Midlands Region	3. Final Business Case	2027/2028	€1 billion+
2.	Greater Dublin Drainage	3. Preliminary Business Case	2025	€500m-€1billion
3.	Ringsend Wastewater Treatment Plant Upgrade Project	4. Implementation/Construction	2025	€500m-€1billion
4.	Arklow Sewerage Scheme Wastewater Treatment Plant	3. Final Business Case	2023	€100m-€250m
5.	Athlone Sewerage Scheme	3. Final Business Case	2023	€50m-€100m
6.	Cork City Water Supply Scheme - Upgrade of Water Treatment Plant	4. Implementation/Construction	2023	€20m-€50m
7.	Galway City Wastewater Network	1. Strategic Assessment	TBC	€20m-€50m
8.	Cork City Wastewater Network	1. Strategic Assessment	TBC	€250m-€500m
9.	Ringsend - Rathmines and Pembroke - Wastewater Network	1. Strategic Assessment	TBC	€100m-€250m
10.	Ballycoolen Trunk Main (Ballycoolen/Kingstown)	3. Final Business Case	2023	€20m-€50m
11.	Blanchardstown Sewerage Scheme	4. Implementation/Construction	2022	€50m-€100m
12.	Saggart Reservoir	4. Implementation/Construction	2022	€50m-€100m
13.	Varyry Water Supply Scheme	4. Implementation/Construction	2021	€100m-€250m
14.	Cork Lower Harbour Main Drainage Project	4. Implementation/Construction	2021	€100m-€250m

Project Ireland 2040 | Infrastructure Pipeline

Table 2: Public Transport Projects

	Name of Project	Stage of Project Lifecycle(1-6)	Construction Completion	Cost Range
1.	Metrolink	2. Preliminary Business Case	2027	€1 billion+
2.	Luas Green Line Capacity Enhancement	4. Implementation/Construction	2021	€50m-€100m
3.	National Train Control Centre	4. Implementation/Construction	2021	€100m-€250m

Table 3: Ports & Airports Projects

	Name of Project	Stage of Project Lifecycle(1-6)	Construction Completion	Cost Range
1.	North Runway Project at Dublin Airport	4. Implementation/Construction	2021	€250m-€500m
2.	Ringaskiddy Port Redevelopment	4. Implementation/Construction	2020	€50m-€100m
3.	New Visual Control Centre at Dublin Airport	4. Implementation/Construction	2019	€50m-€100m

Table 4: Energy Projects

	Name of Project	Stage of Project Lifecycle(1-6)	Construction Completion	Cost Range
1.	Celtic Interconnector Project	3. Final Business Case	TBC	€500m-€1billion
2.	Oweninny Wind Farm Project (Phase 1)	4. Implementation/Construction	2019	€100m-€250m

Table 5: Road Projects

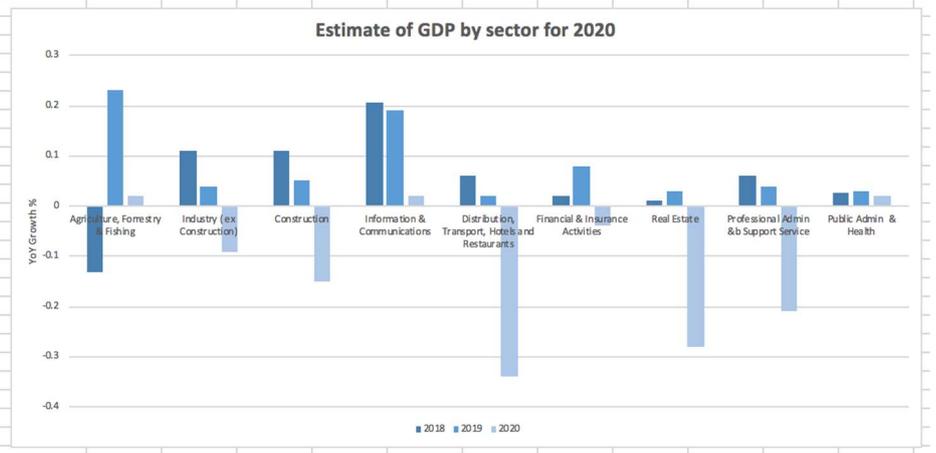
	Name of Project	Stage of Project Lifecycle(1-6)	Construction Completion	Cost Range
1.	N20 Cork to Limerick	2. Preliminary Business Case	TBC	€500m-€1billion
2.	N21/N69 Limerick to Adare to Foynes	2. Final Business Case	2025	€250m-€500m
3.	M11 Capacity Enhancement (Phase 1 & Phase 2)	3. Preliminary Business Case	TBC	€100m-€250m
4.	N28 Cork to Ringaskiddy Road	3. Final Business Case	2027	€100m-€250m
5.	Galway City Ring Road	3. Final Business Case	2025	€500m-€1billion
6.	N5 Ballaghaderreen to Scramogue	3. Final Business Case	2024	€100m-€250m
7.	M8/N25 Dunkettle Interchange	3. Final Business Case	2023	€100m-€250m
8.	N59 Moycullen Bypass	3. Final Business Case	2023	€50m-€100m
9.	N56 Dungloe to Glenties	4. Implementation/Construction	2022	€100m-€250m
10.	N56 Mountcharles to Inver Road	4. Implementation/Construction	2022	€90m-€100m
11.	N22 Ballyourney to Macroom	4. Implementation/Construction	2023	€250m-€500m
12.	Coonagh to Knockallsheen Road	3. Final Business Case	2023	€50m-€100m
13.	M50 Enhancing Motorway Operation Services	4. Implementation/Construction	2021	€50m-€100m
14.	N5 Westport to Turlough	4. Implementation/Construction	2022	€100m-€250m
15.	Shannon Crossing/Killaloe Bypass/R494 Upgrade	3. Final Business Case	2023	€50m-€100m
16.	N4 Collooney to Castlebaldwin	4. Implementation/Construction	2021	€100m-€250m
17.	M7 Naas to Newbridge Bypass Widening	4. Implementation/Construction	2020	€90m-€100m

Civil contractors

Civil Construction Companies in Ireland				
Company	Specialisations	Infrastructure Projects		
Sisk	Highways	A19 Coast Road Tyneside (UK)	PJ Hegarty	Limerick Main Drainage
	Rail	Luas Cross City		Oberbridge Millstreet, Co Cork
	Port & marine	M17/M18		Ballyhale Railway Bridge
		Greystones Marina		Gas Pipeline into the West
		Grand pier Weston Super Mare (UK)		
BAM Ireland	Roads	Waterford Courthouse	Roadbridge	Demolition of Lead-In Jetty at Alexandra Quay West
	Bridges	N25 Ennisorthy/New Ross Bypass		Dublin Port – Design and Construction of Quay Wall Apron Slab Berth 28
	Waste Water	Rose Fitzgerald Kennedy Bridge		Belmullet Sewerage Scheme DBO
	Site Development	Killybegs & Bundoran Sewage Scheme		
	Marine	Sandyford Luas Depot Extension		
	Energy			
John Paul Construction	Transportation	DAA Apron 5H Enabling Work	John Craddock	CHERRYWOOD LUAS - THRUST BORE & DIRECTIONAL DRILLING
	Site Infrastructure	Rathborne Village Site Infrastructure		ASHFORD REGIONAL ROAD - DIRECTIONAL DRILLING OF WATERMAIN
	Energy	Carrigtwohill Flood Relief Scheme		Howth, Balbriggan & Malahide Water Supply Network Upgrade
	Pharma	Pier D Dublin Airport		
	Water	A95 Cromdale Footbridge		
		Sandyford Drummartin Link Road		
Murphy International	Civil Engineering & Transport Infrastructure	Cork Kent Station	Collen Construction	Aughinish Island Marine Terminal
		Grand Canal Dock		North Wall RO-RO Terminal
		Farnworth Tunnels		Ringsend Pumping Station
Siac Construction	Civil Engineering	South Devon Link Road (UK)		
		N56 Kiltroy Roundabout Donegal		
		Luas Green Line Platform Extension		

Sector GDP

Sector	2018	2019	2020
Agriculture, Forrestry & Fishing	-13%	23%	2%
Industry (ex Construction)	11%	4%	-9%
Construction	11%	5%	-15%
Information & Communications	21%	19%	2%
Distribution, Transport, Hotels and Restaurants	6%	2%	-34%
Financial & Insurance Activities	2%	8%	-4%
Real Estate	1%	3%	-28%
Professional Admin &b Support Service	6%	4%	-21%
Public Admin & Health	3%	3%	2%
Arts, Entertainment & Other Service	1%	-1%	-34%



Public entities

Entity	Contact
Irishrail	www.irishrail.ie
Irish Water	www.water.ie
ESB	www.esb.ie
EIRGRID	www.eirgridgroup.com
An Post	www.anpost.ie
GasNetworks Ireland	gasnetworks.ie
Transport Infrastructure Ireland	www.tii.ie

International contractors

Company	Address	Email	Tel
Arup	50 Ringsend Rd, Dublin, D04 T6X0		
Aecom	24 Lower Hatch St, Dublin 2, D02 TY88		
Mott MacDonald	Rockfield Ave, Dundrum, Dublin 16		
Balfour Beatty	City Junction Business Park, Northern Cross, Malahide Rd Dublin 17 D17NP20		

Detailed NDP projects

National Development Plan Live Projects January 2020

Name of Project	Department/Body responsible for Delivering Project	Region	Type of Investment	Project Cost Range (€m)
Remediation of Haulbowline Island	Agriculture, Food and the Marine	Southern	Rural Development	€20m-€50m
Oweninny Wind Farm Project (Phase 1)	Bord na Móna/ESB	Northern and Western	Climate Action	€100m-€250m
Upgrading of the Tyndall National Institute	Business, Enterprise and Innovation	National	Enterprise, Skills and Innovation Capacity	€100m-€250m
National Broadband Plan	Communications, Climate Action and Environment	National	Rural Development	€1 billion+
Skibbereen Flood Relief Scheme	Cork County Council	Southern	Climate Action	€20m-€50m
The Criminal Courts of Justice - PPP: Ongoing Unitary Charge Payments	Courts Service	Eastern and Midland	Other Sectors	€250m-€500m
Abbey Theatre	Culture, Heritage and the Gaeltacht	Eastern and Midland	Culture, Heritage and Sport	€50m-€100m
Chester Beatty Library	Culture, Heritage and the Gaeltacht	Eastern and Midland	Culture, Heritage and Sport	€20m-€50m
Crawford Art Gallery	Culture, Heritage and the Gaeltacht	Southern	Culture, Heritage and Sport	€20m-€50m
Irish Museum of Modern Art	Culture, Heritage and the Gaeltacht	Eastern and Midland	Culture, Heritage and Sport	€20m-€50m
National Archives	Culture, Heritage and the Gaeltacht	Eastern and Midland	Culture, Heritage and Sport	€20m-€50m
National Concert Hall	Culture, Heritage and the Gaeltacht	Eastern and Midland	Culture, Heritage and Sport	€50m-€100m
National Gallery of Ireland	Culture, Heritage and the Gaeltacht	Eastern and Midland	Culture, Heritage and Sport	€50m-€100m
National Library of Ireland	Culture, Heritage and the Gaeltacht	Eastern and Midland	Culture, Heritage and Sport	€20m-€50m
National Museum of Ireland	Culture, Heritage and the Gaeltacht	Eastern and Midland	Culture, Heritage and Sport	€50m-€100m
North Runway Project at Dublin Airport	daa	Eastern and Midland	Airports and Ports	€250m-€500m
Fixed Wing Utility Aircraft	Defence	National	Other Sectors	€20m-€50m
Carrigaline School Campus	Education and Skills	Southern	Education, Health and Childcare	€20m-€50m
DCU Future Tech Building	Education and Skills	Eastern and Midland	Enterprise, Skills and Innovation Capacity	€20m-€50m
E3 Trinity College Dublin	Education and Skills	Eastern and Midland	Enterprise, Skills and Innovation Capacity	€50m-€100m
Maynooth Post-Primary schools	Education and Skills	Eastern and Midland	Education, Health and Childcare	€20m-€50m
Phase 2 UL Glucksman Library	Education and Skills	Southern	Enterprise, Skills and Innovation Capacity	€20m-€50m
Royal Irish Academy of Music (RIAM) redevelopment	Education and Skills	Eastern and Midland	Enterprise, Skills and Innovation Capacity	€20m-€50m
Maynooth University Technology Society and Innovation Building	Education and Skills	Eastern and Midland	Enterprise, Skills and Innovation Capacity	€50m-€100m
Cork University Business School (CUBS)	Education and Skills	Southern	Enterprise, Skills and Innovation Capacity	€100m-€250m

NUI Galway Learning Commons	Education and Skills	Northern and Western	Enterprise, Skills and Innovation Capacity	€20m-€50m
UCD Future Campus Phase 1	Education and Skills	Eastern and Midland	Enterprise, Skills and Innovation Capacity	€100m-€250m
Beaumont Emergency Department	Health	Eastern and Midland	Education, Health and Childcare	€20m-€50m
Beaumont Hospital Radiation Oncology Unit	Health	Eastern and Midland	Education, Health and Childcare	€50m-€100m
Cork University Hospital Radiation Oncology Unit	Health	Southern	Education, Health and Childcare	€50m-€100m
Galway Emergency Department and Ward Block	Health	Northern and Western	Education, Health and Childcare	€100m-€250m
Limerick ward block	Health	Southern	Education, Health and Childcare	€20m-€50m
Mater Dublin clinical laboratory replacement	Health	Eastern and Midland	Education, Health and Childcare	€20m-€50m
Mullingar Theatres	Health	Eastern and Midland	Education, Health and Childcare	€20m-€50m
National Forensic Mental Hospital on Portrane campus (Central Mental Hospital)	Health	Eastern and Midland	Education, Health and Childcare	€100m-€250m
National Rehabilitation Hospital Redevelopment - Phase 1	Health	Eastern and Midland	Education, Health and Childcare	€100m-€250m
New Children's Hospital	Health	Eastern and Midland	Education, Health and Childcare	€1 billion+
Our Lady of Lourdes Hospital, Drogheda (Phases 2-4)	Health	Eastern and Midland	Education, Health and Childcare	€20m-€50m
Sligo Hospital Redevelopment Phase 1	Health	Northern and Western	Education, Health and Childcare	€50m-€100m
Tallaght Renal Dialysis Unit	Health	Eastern and Midland	Education, Health and Childcare	€20m-€50m
University College Hospital Galway, Radiation Oncology Unit	Health	Northern and Western	Education, Health and Childcare	€50m-€100m
Waterford University Hospital Ward Block	Health	Southern	Education, Health and Childcare	€20m-€50m
New Visual Control Tower at Dublin Airport	Irish Aviation Authority	Eastern and Midland	Airports and Ports	€50m-€100m
Arklow Sewerage Scheme Wastewater Treatment Plant	Irish Water	Eastern and Midland	Water Infrastructure	€100m-€250m
Athlone Sewerage Scheme	Irish Water	Eastern and Midland	Water Infrastructure	€50m-€100m
Ballycoolen Trunk Main (Ballycoolen/Kingstown)	Irish Water	Eastern and Midland	Water Infrastructure	€20m-€50m
Ballyshannon Regional Water Supply Scheme - Water Treatment Plant and Network	Irish Water	Northern and Western	Water Infrastructure	€20m-€50m
Blanchardstown Sewerage Scheme	Irish Water	Eastern and Midland	Water Infrastructure	€50m-€100m
Central Kerry Regional Water Supply Scheme - Upgrade of Lough Guitane Water Treatment Plant	Irish Water	Southern	Water Infrastructure	€20m-€50m
Cork City Water Supply Scheme - Upgrade of Water Treatment Plant	Irish Water	Southern	Water Infrastructure	€20m-€50m
Cork City Wastewater Network	Irish Water	Southern	Water Infrastructure	€250m-€500m

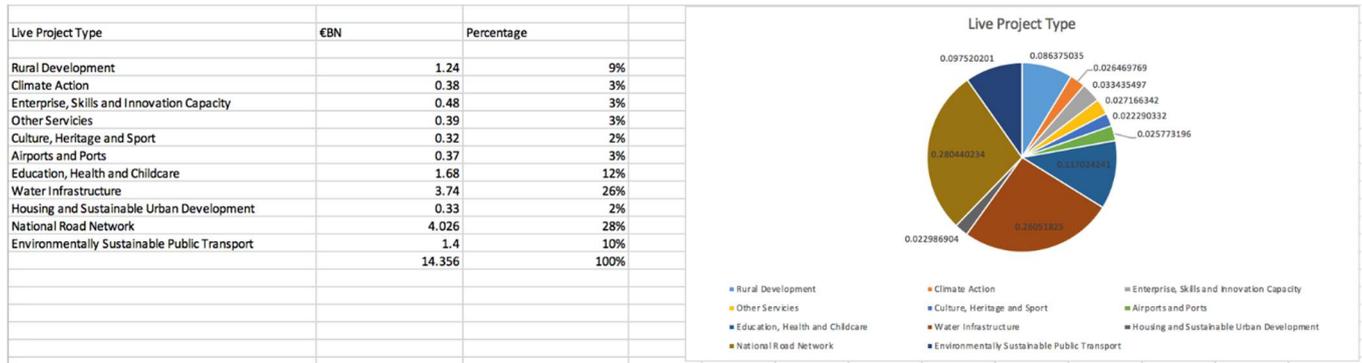
Cork Lower Harbour Main Drainage Project	Irish Water	Southern	Water Infrastructure	€100m-€250m
Donegal (Group B) Sewerage Schemes Wastewater Treatment Plants	Irish Water	Northern and Western	Water Infrastructure	€20m-€50m
Drogheda and Dundalk Water Supply Schemes	Irish Water	Eastern and Midland	Water Infrastructure	€20m-€50m
Galway City Wastewater Network	Irish Water	Northern and Western	Water Infrastructure	€20m-€50m
Greater Dublin Drainage	Irish Water	Eastern and Midland	Water Infrastructure	€500m- €1 billion
Kilkenny Wastewater Network	Irish Water	Eastern and Midland	Water Infrastructure	€20m-€50m
Leixlip Transfer Pipeline	Irish Water	Eastern and Midland	Water Infrastructure	€20m-€50m
Milford, Ramelton and Rathmullan WWTP	Irish Water	Northern and Western	Water Infrastructure	€20m-€50m
Old Connaught/Woodbrook Water Scheme	Irish Water	Eastern and Midland	Water Infrastructure	€20m-€50m
Peamount to Saggart Pump Station and Rising Main	Irish Water	Eastern and Midland	Water Infrastructure	€20m-€50m
Regional Biosolids Storage Facility	Irish Water	Eastern and Midland	Water Infrastructure	€20m-€50m
Ringsend - Rathmines and Pembroke - Wastewater Network	Irish Water	Eastern and Midland	Water Infrastructure	€100m-€250m
Ringsend Wastewater Treatment Plant Project	Irish Water	Eastern and Midland	Water Infrastructure	€500m- €1 billion
Saggart Reservoir	Irish Water	Eastern and Midland	Water Infrastructure	€50m-€100m
Skibbereen Regional Water Supply Scheme - Water Treatment Plant & Network	Irish Water	Southern	Water Infrastructure	€20m-€50m
South Westmeath Regional Water Supply Scheme (Athlone and Mullingar)	Irish Water	Eastern and Midland	Water Infrastructure	€20m-€50m
Terryland Water Treatment Plant	Irish Water	Northern and Western	Water Infrastructure	€20m-€50m
Trillick Wastewater Network	Irish Water	Southern	Water Infrastructure	€20m-€50m
Upper Liffey Valley Sewerage Scheme 2B	Irish Water	Eastern and Midland	Water Infrastructure	€20m-€50m
Upper Liffey Valley Sewerage Scheme Phase 3 Contract 2A	Irish Water	Eastern and Midland	Water Infrastructure	€20m-€50m
Vatry Water Supply Scheme	Irish Water	Eastern and Midland	Water Infrastructure	€100m-€250m
Water Supply Project - Eastern and Midlands Region	Irish Water	Eastern and Midland	Water Infrastructure	€1 billion+
Carlow Wastewater Treatment Plant	Irish Water	Southern	Water Infrastructure	€20m-€50m
Clonroadmore Wastewater Treatment Plant	Irish Water	Southern	Water Infrastructure	€20m-€50m
Dodder Valley Sewer Reinforcement	Irish Water	Eastern and Midland	Water Infrastructure	€50m-€100m
Greater Dublin Area Groundwater Augmentation	Irish Water	Eastern and Midland	Water Infrastructure	€100m-€250m
Kilkenny Regional Water Supply Scheme - Upgrade of Troyswood WTP	Irish Water	Eastern and Midland	Water Infrastructure	€20m-€50m

Lahinch Wastewater Treatment Plant	Irish Water	Southern	Water Infrastructure	€20m-€50m
Letterkenny Regional Water Supply Project including Creeslough Wastewater Treatment Plant	Irish Water	Northern and Western	Water Infrastructure	€20m-€50m
Limerick Wastewater Treatment Plant	Irish Water	Southern	Water Infrastructure	€20m-€50m
Lower Liffey Valley	Irish Water	Eastern and Midland	Water Infrastructure	€20m-€50m
Mallow Wastewater Treatment Plant	Irish Water	Southern	Water Infrastructure	€20m-€50m
Maynooth Transfer Pipeline	Irish Water	Eastern and Midland	Water Infrastructure	€20m-€50m
Midleton Wastewater Network	Irish Water	Southern	Water Infrastructure	€20m-€50m
Midleton Wastewater Treatment Plant	Irish Water	Southern	Water Infrastructure	€50m-€100m
Navan Mid Meath Programme	Irish Water	Eastern and Midland	Water Infrastructure	€100m-€250m
Roscommon Sewerage Scheme	Irish Water	Northern and Western	Water Infrastructure	€20m-€50m
Waterford City Wastewater Treatment Plant	Irish Water	Southern	Water Infrastructure	€20m-€50m
National Laboratory (Limerick)	Irish Water	Southern	Water Infrastructure	€20m-€50m
Limerick Flood Relief Scheme	Limerick City & County Council	Southern	Climate Action	€20m-€50m
Carlingford Flood Relief Scheme	Louth County Council	Eastern and Midland	Climate Action	€20m-€50m
Dundalk Flood Relief Scheme	Louth County Council	Eastern and Midland	Climate Action	€20m-€50m
Financial Management Shared Services Project: 85 - 93 Lower Mount Street, Dublin 2.	National Shared Services Office	Eastern and Midland	Other Sectors	€20m-€50m
Bandon Flood Relief scheme	Office of Public Works	Southern	Climate Action	€20m-€50m
Blackpool Flood Relief Scheme	Office of Public Works	Southern	Climate Action	€20m-€50m
Clonakilty Flood Relief Scheme	Office of Public Works	Southern	Climate Action	€20m-€50m
Enniscorthy Flood Relief Scheme	Office of Public Works	Southern	Climate Action	€20m-€50m
Miesian Plaza	Office of Public Works	Eastern and Midland	Other Sectors	€20m-€50m
Leeson Lane redevelopment	Office of Public Works	Eastern and Midland	Other Sectors	€20m-€50m
Merrion Square/Fenian Street	Office of Public Works	Eastern and Midland	Other Sectors	€20m-€50m
Tom Johnson House	Office of Public Works	Eastern and Midland	Other Sectors	€20m-€50m
Children's Science Centre, North Wing, National Concert Hall Campus	Office of Public Works	Eastern and Midland	Other Sectors	€20m-€50m
Distillers Building, Smithfield	Office of Public Works	Eastern and Midland	Other Sectors	€20m-€50m

Lower Lee (Cork City) Flood Relief Scheme	Office of Public Works	Southern	Climate Action	€100m-€250m
Ringaskiddy Redevelopment	Port of Cork Company	Southern	Airports and Ports	€50m-€100m
Capacity Extension Works	Shannon Foynes Port Company	Southern	Airports and Ports	€20m-€50m
Ardee bypass	Transport, Tourism and Sport	Eastern and Midland	Rural Development	€20m-€50m
Athy Southern Distributor Road	Transport, Tourism and Sport	Eastern and Midland	Housing and Sustainable Urban Development	€20m-€50m
Coonagh to Knockalisheen Road	Transport, Tourism and Sport	Southern	Housing and Sustainable Urban Development	€50m-€100m
Eastem Garavogue Bridge and Approach Road (Department of Transport Tourism and Sport element)	Transport, Tourism and Sport	Northern and Western	Rural Development	€20m-€50m
Galway City Ring Road	Transport, Tourism and Sport	Northern and Western	National Road Network	€500m-€1billion
Listowel Bypass	Transport, Tourism and Sport	Southern	National Road Network	€20m-€50m
Luas Cross City	Transport, Tourism and Sport	Eastern and Midland	Environmentally Sustainable Public Transport	€250m-€500m
Luas Green Line Capacity Enhancement	Transport, Tourism and Sport	Eastern and Midland	Environmentally Sustainable Public Transport	€50m-€100m
M50 Enhancing Motorway Operation Services (EMOS) - M50 Traffic Flow Optimisation	Transport, Tourism and Sport	Eastern and Midland	National Road Network	€50m-€100m
M7 Naas to Newbridge Bypass Widening	Transport, Tourism and Sport	Eastern and Midland	National Road Network	€50m-€100m
M8/N25 Dunkettle interchange	Transport, Tourism and Sport	Southern	National Road Network	€100m-€250m
MetroLink	Transport, Tourism and Sport	Eastern and Midland	Environmentally Sustainable Public Transport	€1 billion+
N2 Slane Bypass	Transport, Tourism and Sport	Eastern and Midland	National Road Network	€50m-€100m
N20 Cork to Limerick	Transport, Tourism and Sport	Southern	National Road Network	€500m-€1billion
N21/N69 Limerick to Adare to Foynes	Transport, Tourism and Sport	Southern	National Road Network	€250m-€500m
N22 Ballyvoumev to Macroom	Transport, Tourism and Sport	Southern	National Road Network	€100m-€250m
N28 Cork to Ringaskiddy Road	Transport, Tourism and Sport	Southern	National Road Network	€100m-€250m
N4 Collooney to Castlebaldwin	Transport, Tourism and Sport	Northern and Western	National Road Network	€100m-€250m
N5 Ballaghaderreen to Scramoge	Transport, Tourism and Sport	Northern and Western	National Road Network	€100m-€250m
N5 Westport to Turlough	Transport, Tourism and Sport	Northern and Western	National Road Network	€100m-€250m
N56 Dungloe to Glenties	Transport, Tourism and Sport	Northern and Western	Rural Development	€100m-€250m
N56 Mountcharles to Inver Road	Transport, Tourism and Sport	Northern and Western	Rural Development	€50m-€100m
N59 Moycullen Bypass	Transport, Tourism and Sport	Northern and Western	Rural Development	€50m-€100m

N72/N73 Mallow Relief Road	Transport, Tourism and Sport	Southern	National Road Network	€50m-€100m
National Indoor Arena Phase 2	Transport, Tourism and Sport	Eastern and Midland	Culture, Heritage and Sport	€20m-€50m
National Train Control Centre	Transport, Tourism and Sport	Eastern and Midland	Environmentally Sustainable Public Transport	€100m-€250m
PPP: M11 Gorey-Enniscorthy Motorway	Transport, Tourism and Sport	Southern	National Road Network	€500m-€1 billion
PPP: N17/N18 Gort-Tuam	Transport, Tourism and Sport	Northern and Western	National Road Network	€1 billion+
PPP: N25 New Ross Bypass	Transport, Tourism and Sport	Southern	National Road Network	€250m-€500m
R407 Sallins Bypass	Transport, Tourism and Sport	Eastern and Midland	Housing and Sustainable Urban Development	€50m-€100m
Shannon Crossing/Killaloe Bypass/R494 Upgrade	Transport, Tourism and Sport	Southern	Housing and Sustainable Urban Development	€50m-€100m
Bunratty Road (Phase 1c)	Housing, Planning and Local Government	Eastern and Midland	Housing and Sustainable Urban Development	€20m-€50m
Springvale, Chapelizod	Housing, Planning and Local Government	Eastern and Midland	Housing and Sustainable Urban Development	€20m-€50m
Nangor Road, Clondalkin	Housing, Planning and Local Government	Eastern and Midland	Housing and Sustainable Urban Development	€20m-€50m
Comamona, Ballyfemot	Housing, Planning and Local Government	Eastern and Midland	Housing and Sustainable Urban Development	€20m-€50m
Bonham Street, Dublin 8	Housing, Planning and Local Government	Eastern and Midland	Housing and Sustainable Urban Development	€20m-€50m
Cork St / Chamber St, Dublin 8	Housing, Planning and Local Government	Eastern and Midland	Housing and Sustainable Urban Development	€20m-€50m
St. Teresa's Gardens	Housing, Planning and Local Government	Eastern and Midland	Housing and Sustainable Urban Development	€20m-€50m
Dominick Street (East Side)	Housing, Planning and Local Government	Eastern and Midland	Housing and Sustainable Urban Development	€20m-€50m

NDP projects



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