



# **NATIONAL POPULATION PROJECTIONS AND REGIONAL POPULATION TARGETS 2006 – 2020**

**February 2007**

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## **1. BACKGROUND**

Since the publication of the 2006 Census preliminary results, it has become necessary to review the population projections which have been used in the National Spatial Strategy (NSS) and which formed the basis for the Regional Planning Guidelines (RPGs) adopted in mid-2004. This review is also necessitated by the fact that the Central Statistics Office's (CSO) regional population projections up to 2021 which were produced in 2005 will only be reviewed in late 2007 or early 2008.

This document sets out national population projections and regional population targets for 2020 which have implications for RPGs and Development Plans (see below). They also provide a basis for how Government bodies may allocate infrastructure investments.

A two-stage procedure was adopted to arrive at these regional population targets. Firstly, national projections up to 2020 were made. Secondly, the national projections were used as a basis for making estimates of regional population numbers. The sum of the regional totals would of necessity match the national projection.

The methodology used to arrive at the projections set out in this document differs from the usual trends-based projection methodology. The trends methodology is based on projecting past trends into the future with modifications to take account of how such trends may vary in the future. In the case of the projections set out in this document, the impact of implementation of Government policy in the form of the NSS was specifically factored into the forecasting process. By contrast, the CSO regional projections specifically excluded consideration of such policy implementation. A central question when factoring a policy into forecasts is the likely extent of changes which policy implementation will have. The underlying assumption in these projections is that the policy will be vigorously implemented through Government actions and such actions will have significant effects on regional population distribution. The key means through which the NSS will be implemented are the National Development Plan 2007-2013 (NDP), alignment of RPGs, Development Plans etc. and the alignment of policies and actions by Government Departments and State agencies.

## **2. IMPLICATIONS FOR REGIONAL AND PLANNING AUTHORITIES**

Section 26(1) of the Planning and Development Act 2000 provides that RPGs be reviewed not later than six years after the making of the guidelines i.e. by 2010. The Act does not provide for a partial review. Nonetheless, guidance issued by the Department to Regional Authorities in 2005 recommended that the RPG Implementation Groups should publish annual "Review and Update" reports. While such reports have no statutory basis, they should be taken into account by Planning Authorities in reviewing their development plans.

The Department is of the view that all Regional Authorities should prepare such "Review and Update" reports of their RPGs on the basis of the revised population estimates set out in this document. These revised population targets may have implications for housing, enterprise, infrastructure and many other aspects of Guidelines and thus it would be appropriate for the Authorities to consider the implications for all components of their RPGs.

Once Regional Authorities have completed their 'Review and Update' reports, it is strongly recommended that Planning Authorities give consideration to the findings for their Development Plans, Housing and Retail Strategies and possibly other plans and programmes.

### 3. EXISTING PROJECTIONS

Three sets of national and regional projections have been made which are of planning relevance, namely, the NSS projections made in 2002, those adopted into the RPGs in 2004 and the projections made by the CSO in 2004 and 2005.

In the case of the NSS, high and low population projections were made for 2020. The low projection indicated a national population in 2020 of about 4.4m and was based on past and then current demographic trends. The high projection was based on the assumption that there would be strong economic growth into the future and indicated that the 2020 population would be just over 5.0m. At the time, the former projection was considered to be more likely (given the global economic slow-down following 9/11) and thus the lower estimate formed the basis for the population projections used in the NSS.

In the case of the RPGs, the Department and the CSO produced three regional growth scenarios all of which involved a national population of about 4.5m in 2020. All three scenarios<sup>1</sup> were based largely on recent and current trends at a regional level. The most likely scenario based on trends was then adjusted to take account of an 'NSS effect'. This effect resulted in a national population estimate of 4.7m and regional estimates for 2020 which were higher in all cases than the estimates without the 'NSS effect'. The DoEHLG issued these adjusted regional estimates as guidelines for Regional Authorities to use when making their RPGs. The projections finally adopted into RPGs were the same or very similar to the Departmental guideline populations.

In December 2004, the CSO published national population projections up to 2036 based on six different scenarios for mortality, fertility and migration. The most likely projection (M1F2) indicates a population at 2021 of 5.07m. In May 2005, the CSO published regional projections based on two national growth patterns (M1F2 and M2F2) and three different regional growth scenarios ('recent trends', 'medium' and 'traditional')<sup>2</sup>. The most likely scenario (M1F2 'medium') was identified, with some of the main features being that all regions would experience population growth, the Mid-East and West would be the fastest growing areas, Dublin would lose out to other regions due to more people leaving the region than entering into it and the Mid-West also losing out to other regions due to greater out-migration flows. In the case of the GDA, the CSO suggested that the percent of the national population would grow from 39.2% in 2002 to 40.7% by 2021.

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<sup>1</sup> 'Recent demographic trends'; 'Medium'; and 'Traditional'

<sup>2</sup> 'Recent' involves the movement pattern indicated between 2001 and 2002 continuing into the medium term and then moderating by 2021. 'Traditional' involves the 2001/02 pattern reverting to the traditional 1995/96 pattern in the medium term. 'Medium' involves the 2001/02 pattern moderating in the short term.

**Table 1 : Comparison between Projections for 2020**

Region	NSS low estimates	DoEHLG guideline estimates	Estimates adopted into RPGs	CSO M1F2 <sup>3</sup> (Medium)
Border	390,000	550,000	550,000	540,490
GDA	1,900,000	1,800,000	1,832,000	2,039,000
Midland	210,000	300,000	325,000	292,728
Mid-West	370,000	400,000	400,000	406,955
South-East	440,000	500,000	500,000	531,904
South-West	590,000	670,000	670,000	699,722
West	445,000	480,000	460,000	506,223
<b>TOTAL</b>	<b>4,345,000</b>	<b>4,700,000</b>	<b>4,737,000</b>	<b>5,017,022</b>

Clearly, based on the data in the above table, there are significant differences between the various national and regional population estimates to 2020, all of which were made prior to the publication of the preliminary Census 2006 data.

#### **4. RECENT GROWTH PATTERNS**

In order to have a context in which to review projections, it is appropriate to identify broad patterns of growth in the recent past.

**Table 2 : Rates of Growth 1991 to 2006 (% compound per annum)**

Region	1991-96	1996-02	2002-06
Border	0.21	1.01	1.95
Dublin	0.63	0.99	1.38
Mid-East	1.32	2.91	3.58
<b>GDA</b>	<b>0.80</b>	<b>1.48</b>	<b>1.99</b>
Midlands	0.25	1.55	2.77
Mid-West	0.40	1.15	1.52
South-East	0.43	1.32	2.11
South-West	0.53	1.00	1.69
West	0.54	1.28	2.11
<b>State</b>	<b>0.56</b>	<b>1.30</b>	<b>1.97</b>

Some of the more noticeable features of the patterns indicated above are set out below.

- ◆ **All Regions.** Growth occurred in all regions in all periods, with the rates of growth increasing in each of the three census periods from 1991 to 2006. There has been, however, been considerable differences between the rates of growth between regions.
- ◆ **The Dublin Region.** In the 1991-96 period, the Dublin region grew faster than the State but since then its growth has been significantly below the State level. In fact, in the 2002-06 period, this region has the slowest regional growth rate in the country. The relative slowdown in this region's growth rate is highlighted by the fact that,

<sup>3</sup> The CSO's regional projections were made for 2006, 2011, 2016 and 2021. The 2020 estimates indicated in the table were derived by applying the compound annual rate of growth for the period 2016 to 2021 to the 2016 population and projecting ahead to arrive at the 2020 estimate.

between 1991 and 1996, it accommodated 32.8% of the national population growth but in the 2002-06 period, this figure had declined to 19.9%.

- ♦ **The Spread of Dublin.** At the broadest level, the impact of Dublin has spread, most strongly, into the Mid-East region but also into surrounding regions, notably the Midlands and to a lesser extent, the South-East. The Midlands growth has been substantially above the State rate for the 1996 to 2006 period, although its rate of increase has been declining in relation to the State rate. The South-East grew considerably more slowly than the State in the 1991-96 period but its growth rate has been moderately higher than State rates since 1996.

A county-level analysis of the population growth data between 1991 and 2006 indicates that the eight counties adjacent to the GDA<sup>4</sup> have grown particularly strongly. Between 1991 and 1996, these eight counties accounted for 7.3% of the overall national population growth. However, in the 2002 to 2006 period, the counties accommodated 19.5% of the national increase, a proportion only slightly behind the 19.9% accounted for by the Dublin region. Clearly, a commuter belt focused on Dublin has emerged which extends beyond the GDA.

- ♦ **Other Regions.** Outside the GDA, two distinct growth patterns have occurred. Firstly, there are the regions which display favourable growth patterns. The West and the Border regions have displayed a consistently upward trend in their rates of growth relative to the State as a whole. In the case of the West, the growth has been from marginally below the State rate in the 1991-96 period to marginally above in the 2002-06 period.

While the Border region has grown more slowly than the State over the whole period, the gap with the State rate has, however, narrowed considerably. The Midlands has shown the most significant change in its growth pattern, from being second to slowest in the 1991-96 period to being the fastest growing region over the 2002-06 period. Part of this growth may be attributed to the spread of the Dublin-based commuter belt beyond the GDA.

Secondly, the Mid-West and the South-West have grown relatively more slowly than the State over the whole period. The growth rate in the Mid-West region in particular has been particularly slow (second slowest after Dublin).

The above patterns of growth have been reflected in the percentage shares of the State population which have occurred in each of the regions (see Table 3 following).

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<sup>4</sup> Louth, Monaghan, Cavan, Westmeath, Offaly, Laois, Carlow and Wexford

**Table 3 : Regional Shares (%) of State Population - 1991 to 2006**

Region	1991	1996	2002	2006
Border	11.42	11.23	11.04	11.04
Dublin	29.08	29.18	28.66	28.01
Mid-East	9.23	9.58	10.54	11.22
<b>GDA</b>	<b>38.31</b>	<b>38.77</b>	<b>39.20</b>	<b>39.23</b>
Midlands	5.76	5.67	5.75	5.94
Mid-West	8.81	8.74	8.67	8.51
South-East	10.87	10.80	10.81	10.87
South-West	15.10	15.08	14.82	14.65
West	9.73	9.72	9.71	9.76
<b>State</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>

A notable feature of the data in Table 3 is that the GDA's share of the State population increased up to 2002 but has effectively remained constant over the period up to 2006. However as noted above, the impact of Dublin has extended beyond the GDA and thus the GDA data understate the consolidation of population growth which is focussed on Dublin. While the population increased in all of the regional authority areas between 2002 and 2006, the influence of net migration (in-migration less out-migration) on overall regional growth varied, being greatest in the West, Midlands and the Border and least in Dublin.

**Table 4: Population Increases 2002-2006 by Regional Authority**

Region	2006 population	Increase since 2002	% of increase due to net in-migration
Border	467,327	34,793	69%
Dublin	1,186,159	63,338	34%
Mid East	475,026	62,401	65%
<b>GDA</b>	<b>1,661,185</b>	<b>125,739</b>	<b>50%</b>
Midland	251,380	26,017	70%
Mid West	360,651	21,060	52%
South East	460,474	36,858	63%
South West	620,525	40,169	60%
West	413,383	33,086	72%

## 5. NATIONAL PROJECTIONS

Broadly speaking, two factors shape the final national population numbers, namely natural increase (births minus deaths) and net migration. The key assumptions regarding each of these underlying drivers of population change are set out below.

- ✦ **Natural Increase**. In these calculations, the F2 pattern of increase which the CSO used when making its national projections was applied. In the case of fertility, the total fertility rate was assumed to decline from 2002 to 2011 and then remain stable for the period up to and beyond 2020. In the case of mortality, the rates were assumed to decrease for both males and females (i.e. people live longer) over the whole of the period from 2002 to 2020 and beyond.

Between 2002/3 and 2005/6, natural increase contributed between about 32,000 and 34,000 people *per annum*. The pattern of natural increase which is assumed in these projections is as indicated below.

2006-11 : 34,000 per annum  
 2011-16 : 35,000 per annum  
 2016-20 : 32,000 per annum.

- ◆ **Migration.** The levels at which in- and out-migration take place into the future will have a significant effect on the overall national population. Net migration levels are the product of many factors, some of the most notable ones being the rate of growth of the overall economy, the sectoral patterns of economic growth, policies regarding European Union expansion and national policies regarding entry for people from new Member States. In the period from 2002 to 2005, Ireland experienced a very substantial increase in net migration. The rate in 2002-03 was approximately 30,000 but this rose to about 70,000 in 2005-06. The levels of net migration which is assumed in these projections are set out in the table below.

2006-11 : 50,000 per annum  
 2011-16 : 45,000 per annum  
 2016-20 : 37,500 per annum.

The combination of the above natural and migration increases gives rise to national population estimates as set out the table below.

**Table 5 : National Population Projections to 2020**

Year	2006	2011	2016	2020
<b>Population</b>	4,234,925	4,655,000	5,055,000	5,333,000

Alternative national projections were made, based on different migration assumptions. These alternatives resulted in national population projections in 2020 ranging from about 5.1m to around 5.5m. However the projections indicated in Table 5 above were selected as the basis for making regional estimates as they represented a more likely situation than the higher possibly unsustainable projections and the lower possibly unduly 'pessimistic' projections.

In order to place the 2020 estimate of 5.33m in context, it is appropriate to note that if the population were to grow from 2006 to 2020 at the same rate as it grew between 2002 and 2006, then the 2020 population would be 5.64m. Alternatively, growth into the future at the 1996 to 2006 rate would result in a 2020 population of 5.26m. The growth indicated in the above table is thus more closely aligned to the past 10-year growth pattern than the more rapid growth experienced in Ireland over the last four years.

## 6. REGIONAL PROJECTIONS

The NSS is a policy framework intended to shape future spatial patterns of development across Ireland so as to achieve a more appropriate balance between regions and areas. More specifically, the intention is to achieve a higher proportion of growth occurring away from the Dublin area without in any way damaging or constraining the growth of Dublin. A key element of the policy is the view that regions and local areas away from Dublin have development potential which if 'unlocked' would result in higher levels of growth than would otherwise be the case. Realising this potential would in time see a higher proportion of national population growth, economic development and physical development (houses, shops, recreation facilities etc.) occurring in areas away from the Dublin area. As this non-Dublin area growth would not be at the expense of the Dublin area, the overall result would be an expansion in the overall national levels of growth. Growth in the areas away from the Dublin area would over the longer term be achieved through appropriate infrastructure and other investments, adoption of suitable planning frameworks, establishment and enhancement of development-focussed organisational arrangements, collaboration between authorities, marketing initiatives, co-ordinated government policies and strategies and other means.

The patterns of growth highlighted in section 3 above contain trends which are in line with NSS objectives (e.g. West, Border and the Midlands to the extent that it is not only Dublin-commuter driven). However, there are also trends which are less favourable and which pose significant challenges. Into this latter category fall the spread of the impact of Dublin beyond the GDA boundary, the relatively slow growth of the Dublin region relative to the surrounding areas and the relatively slower growth of the South-West and Mid-West regions.

The assumptions which have been adopted and which underpin the regional population projections set out in Table 7 below are:

- ◆ The regions adjacent to the GDA (South-East and Midlands) will grow but at relatively slower rates, which over time are more commensurate with higher levels of locally generated growth and less reliance on Dublin-orientated commuting;
- ◆ Within the GDA, a re-balancing of future growth will take place such that the decline in the Dublin region's relative share of GDA growth is slowed and the rapid relative growth in the Mid-East region is moderated;
- ◆ Strongly focussed measures within the implementation framework mentioned in section 7 below will be implemented to support growth in the South-West and Mid-West. These actions would slow the relative decline in their national share of population growth; and
- ◆ Government support will continue for those regions which have been performing appropriately in NSS terms, namely the West and Border.

The above broad assumptions have been translated into patterns of growth by region as indicated below.

**Table 6 : Broad Patterns of Regional Change**

Region	Change Patterns
Border	Stable share in 2006-10; increases in share to 2020
Dublin	Slowing in the decline in share over the period 2006-20
Mid-East	Slight slowing in the rate of increase in share over the period 2006-10; increase in share takes place at a slowing rate in the 2010-20 period
Midlands	Slowing increases in share over the whole period 2006-20
Mid-West	Slowing rate of decrease 2006-10; slight increases 2011-20
South-East	Static share over period 2006-20
South-West	Decrease in share 2006-10; increases in period 2011-20
West	Stable share 2006-10; increases in period 2011-20

The above patterns are reflected in regional population targets in the tables below.

**Table 7 : Regional Target Projections to 2020**

Region	2006	2011	2016	2020	% Share 2006	% Share 2020	RPG 2020	2020 target over RPG
Border	467,327	513,683	559,087	590,367	11.04	11.07	550,000	40,367
Dublin	1,186,159	1,287,525	1,390,579	1,464,387	28.01	27.46	-	-
Mid-East	475,026	537,041	575,605	601,930	11.22	11.29	-	-
<b>GDA</b>	<b>1,661,185</b>	<b>1,824,566</b>	<b>1,966,184</b>	<b>2,066,317</b>	<b>39.23</b>	<b>38.75</b>	<b>1,832,000</b>	<b>234,317</b>
Midlands	251,380	284,694	314,213	333,093	5.94	6.25	325,000	8,093
Mid-West	360,651	391,770	426,698	451,764	8.51	8.47	400,000	51,764
South-East	460,474	506,150	549,643	579,870	10.87	10.87	500,000	79,870
South-West	620,525	679,749	741,951	784,354	14.65	14.70	670,000	114,354
West	413,383	454,388	497,224	527,235	9.76	9.89	460,000	67,235
<b>State</b>	<b>4,234,925</b>	<b>4,655,000</b>	<b>5,055,000</b>	<b>5,333,000</b>	<b>100.00</b>	<b>100.00</b>	<b>4,737,000</b>	<b>596,000</b>

The table indicates that, in the case of some regions, the population estimates at 2020 differ significantly from the current RPG population estimates. In all cases, the current regional population targets are higher than the RPG estimates.

## 7. IMPLEMENTING THE NSS AND SHAPING SPATIAL GROWTH PATTERNS

In order for the spatial patterns set out in the projections in Table 7 to become a reality by 2020, it is necessary for NSS objectives and measures to strongly infuse Government policy, investment and actions in the years ahead. Recent and current developments are in line with this approach, as set out below.

- ♦ **NDP 2007-2013.** This Plan will have the NSS as the central spatial organising principle, shaping expenditure patterns in key areas which impact on regional growth over the seven-year Plan period and in so doing will have significant effects up to 2020.
- ♦ **Five-Year Rolling Capital Budgets.** All Government Departments are now required in their five-year rolling capital envelopes to indicate how their proposed capital

expenditures promote the NSS. Furthermore, at the end of each year, they are required to indicate how they have advanced NSS objectives before approval for the next five-year period may be given.

- ◆ **Monitoring.** An enhanced monitoring system will be put in place to track NDP expenditures and outcomes. NSS requirements will form a central part of the system. This improved monitoring capacity will enable remedial measures to be taken, if necessary, at an early stage.
- ◆ **Co-ordination Structures.** Such structures will be enhanced at both national Government level as well as between the national and regional levels.
- ◆ **Planning Frameworks.** The RPGs provide an important framework at the regional level for the implementation of the NSS. As required under the Planning and Development Act 2000, Development Plans are required to have regard for such regional guidelines. Local Area Plans (LAPs) are also required to be consistent with the objectives in the applicable Development Plan. In the period up to 2020, RPGs will be reviewed at least twice (e.g. in 2010 and 2016), and these reviews, and any others which may be made, provide opportunities if necessary to refocus and revise regional objectives, policies and programmes.
- ◆ **Joined-up Government.** Achieving greater levels of co-ordination within and between Government Departments and between national and local government are and will remain high Government priorities. Existing and possibly enhanced measures to achieve such co-ordination will play a significant role in ensuring that Departmental objectives, policies, programmes and actions are consistent with the NSS aims and requirements.
- ◆ **Enterprise.** Enterprise support and development policies and programmes will continue to promote NSS aims and objectives.

## 8. CONCLUDING COMMENTS

The NSS is an ambitious cross-cutting policy initiative which holds out the potential for benefits across all sectors of Irish society and in all parts of the country. Realising this potential will require concerted and co-operative action across government at all levels. The regional population estimates for 2020 provide a spatial vision for the future and a set of targets around which this type of action can be organised.

As mentioned in section 2 above, the immediate next step is for the Regional Authorities to undertake reviews of their population estimates, taking into account the data set out in this document, and to determine if appropriate variations to objectives, policies, programmes or projects in their current RPGs are necessary.