South-East Regional Authority
Údarás Réigiúnach an Oir-Dheiscirt

SOCIO-ECONOMIC AND BUSINESS CASE FOR THE MAINTENANCE OF THE ROSSLARE–WATERFORD–LIMERICK RAIL CORRIDOR

Submission to the National Transport Authority

30th July 2010

This report and submission to the National Transport Authority has been prepared by KSA, Imrecon and Fisher Associates for and on behalf of the following:

South-East Regional Authority
Carlow County Council
Kilkenny County Council
South Tipperary County Council
Waterford County Council
Waterford City Council
Wexford County Council

Mid-West Regional Authority
Clare County Council
Limerick County Council
Limerick City Council
North Tipperary County Council

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EXECUTIVE SUMMARY

The Context

The Rosslare–Limerick Junction Railway line is approximately 192 kilometres of railway infrastructure linking population centres across the south of the country. But it is currently severely under-used. The whole line has been identified as under-performing and earmarked by a national report for possible closure. The nation's financial resources are under considerable pressure at this time and there is a consequent need to reduce losses on the rail network. An under-performing rail line is a natural candidate for closure.

Iarnród Éireann has announced its intention to terminate passenger services on the Rosslare-Waterford section of the line and they have set out their business case for doing so. The decision to terminate is subject to approval by the National Transport Authority (NTA).

The Rosslare-Waterford section currently only operates one daily passenger service each way. A return journey within the day is possible only in one direction, with one service into Waterford early in the morning and a return journey late afternoon. Few people, around 25, use the service daily. Many respondents to the consultation phase of this study have identified service level issues that would keep demand levels low. These include a low frequency of service, inconvenient timings and the lack of good interconnection with ferry or other rail services.

This Study

The NTA has invited a submission from the affected regional and local authorities to inform its decision. This report has been commissioned by the South-East Regional Authority, the Mid-West Regional Authority and their constituent local authorities to form part of that submission.

The project team, namely KSA, Imrecon and Fisher Associates, has carried out a comprehensive analysis of the complete Rosslare-Waterford-Limerick rail corridor, an in-depth review of all of the relevant policy context, considered the socio-economic and business case for an alternative strategy to address the performance issues and reviewed the business case submitted by Iarnród Éireann to the NTA.

The Rail Corridor

The South-East region comprising of Carlow, Kilkenny, South Tipperary, Waterford and Wexford had a population of 460,838 persons in 2006.The population for the South-East Region is projected to increase from 487,800 persons in 2008 to 580,500-596,500 persons in 2022. The Mid-West region comprising of Clare, Limerick and North Tipperary had a population of 361,028 persons in 2006. The population of the Mid-West region is projected to increase from 371,900 persons in 2008 to 462,300-475,000 in 2022.

A 20km buffer either side of the overall Rosslare-Waterford-Limerick rail line was established to represent the potential 'catchment' of those that could use or be impacted by the rail service along the rail line. There was a population of 464,210 persons recorded in 2006 within a 20km buffer along the corridor with a population of 316,130 persons recorded in 2006 within a 10km buffer along the corridor. A more focussed 20km and 10km buffer was also established for the Rosslare-Waterford section of the rail line. A population of 247,710 was recorded within a 20km buffer along this section of the corridor with a population of 117,920 within a 10km buffer.

Policy Framework

The EU, national, regional and local framework of planning policies and strategic plans is considered to be integral to the country's economic vitality, which in turn underpins the rating of Government debt.

At the EU and national levels, there is recognition of the need for integrated transport strategies to support polycentric development. In the South-East Region, the National Spatial Strategy (NSS) identifies Waterford City as a Gateway, supported by Wexford Town and Kilkenny City as Hubs, forming a nationally strategic 'growth triangle' with a critical mass of population to drive development in the South-East region.

The NSS identifies that the objective of balanced regional development will be supported by an improved network of roads and public transport, and specifically that '*Ireland's transport networks must build on Ireland's radial transport system of main roads and rail lines connecting Dublin to other regions, by developing an improved mesh or network of roads and public transport services*'. Another objective is to enhance international access to all parts of the country '*by facilitating effective interchange possibilities between the national transport network and international airports and sea ports*'.

At the same time, the Smarter Travel policy for sustainable transport highlights the need for a modal shift to public transport and other sustainable forms of travel.

The NSS and the South-East Region's growth and settlement strategies seek to ensure population growth enhances the critical mass in the Gateways, Hubs and County Towns. Consistent with national and regional policy, the Wexford County Development Plan identifies the key settlements on the Rosslare-Waterford rail line as strategic growth centres, in a county that has seen and projects relatively high rates of growth in population. The presence of infrastructure, specifically transport infrastructure, integrated transport systems and the scope to enhance transport services, plays an important role in supporting these strategies.

The conclusion is that a viable rail service on the Rosslare-Limerick line, and specifically on the Rosslare-Waterford section, would contribute materially to the objectives behind the national and regional policy framework. A decision to close passenger services on a rail line linking population centres identified as a Gateway and a supporting Hub, would seriously be in conflict with the thrust of national and regional policy.

The key question is therefore whether the line is capable of generating enough passenger traffic to make a material contribution to these policy objectives.

The Business Case

The project team has identified a number of critical shortcomings in the Iarnród Éireann business case for terminating passenger services on the Rosslare-Waterford line. It is considered that these shortcomings render the business case an unsafe basis for the NTA decision or, indeed, the decision that CIÉ would be required to make under the Transport Act, 1958. This report considers the business case for an alternative option.

Low frequency services, especially with poor interconnections with other services, cannot be expected to attract large numbers of travellers. Iarnród Éireann's survey of passengers on the Rosslare-Waterford service shows that passengers on the existing service substantially represent one segment of the market: people living in rural Wexford County and studying at educational establishments in Waterford City. Experience elsewhere, in particular in the UK, suggests that services can be successful when they appeal to diverse needs of the travelling public, where no one market segment would be big enough to justify a rail service but where together they achieve a critical mass.

The project team has developed a quantitative estimate of the potential of the line to attract passenger traffic between the key population and employment centres. This submission's conclusive analysis identifies that the critical mass and the natural economic linkages between the two centres of Waterford and Wexford provide the natural foundation for a rail transport market. In the 2006 census, these two centres alone represented employment in excess of 30,000, with a total population within 10km of the Wexford/Rosslare-Waterford rail corridors of 125,000. The pattern of commuting revealed in the Central Statistics Office (CSO) POWCAR data (2006) showed that rather more workers commuted east into Wexford than commuted west into Waterford. The role of Wexford as a supporting Hub to the Gateway city of Waterford, together with their traditional relationship as neighbouring county capitals, indicate that economic and social linkages between the two centres should be relatively strong.

It is evident that the natural rail market for the Rosslare-Waterford incorporates Wexford Town. This submission has developed an illustrative timetable of substantially more frequent rail services that would more appropriately meet that market's needs.

To identify the potential of those rail services, the submission has carried out comparative analysis with four rural rail lines in England and Wales which are considered reasonably successful. Based on levels of patronage on the comparator lines in relation to the population and service statistics on those lines, it has been identified a range of estimates of future passenger numbers travelling by rail between Wexford/Rosslare and Waterford, depending on how the service is enhanced and developed. This report's analysis indicates that the more frequent services, properly promoted, should become dramatically more attractive for the travelling public. These levels of traffic would be consistent with the line being economically sustainable, while achieving benefits in terms of reduced congestion, better access for disadvantaged people and closer economic ties between the population and employment centres of the South-East.

Importantly, the necessary improvements in service frequency do not depend on any substantial improvements to the infrastructure and require only rolling stock that would be justified by the potential levels of traffic. Rail is characterised by fixed costs which means that the optimum strategy for a rail line is generally to maximise the use of existing infrastructure. That strategy has not been tried in a sustained way on this line and our analysis suggests that it would generate proportionately positive economic benefits for the region, benefits that could not realistically be generated by alternative bus services.

At the same time, this submission's analysis has identified significant potential demand for freight services on the Rosslare-Limerick line, including on the Rosslare-Waterford section.

Community Rail Partnership

However, the analysis of this submission has identified an important condition for successful development of the line. This submission is, accordingly, informed by the experience in the UK that shows that successful development of rural lines requires a local focus. The national train and rail operator is necessarily primarily focused on its core national network and cannot always be expected to deliver the focus, energy and ideas that are so important for successful development of lines that are secondary to the core network. These are community rail lines. Over the last decade in the UK, the strategy for community rail lines has recognised the important role that Community Rail Partnerships (CRPs) can play and there are now abundant examples of thriving partnerships. We believe that successful development of services on the Rosslare-Waterford line, and by extension the Rosslare-Waterford-Limerick Junction line, will depend on a similar kind of CRP being established.

CRPs are not-for-profit organisations comprising local authorities, community groups, rail user groups and train operators, and may also include local businesses, other public bodies and other transport service providers.

The role of the CRP is to promote and develop the railway for the benefit of the local community whilst recognising that, to be successful, it has to deliver more passengers and other benefits for the railway itself. The CRP is able to mobilise the resources of the partner organisations to these ends, which can include financial sponsorship, management time, influence and ideas.

The activities of a CRP will create a sense of local involvement, increase awareness of rail services, identify local needs and help the train operator tailor rail services to meet those needs.

For a CRP to be successful would require the committed involvement of the train operator, Iarnród Éireann, and local organisations, namely regional authorities, local authorities, community stakeholders, etc. The potential upsides for Iarnród Éireann and for the region are significant, but it will require collaboration and commitment on all sides. Importantly, the trains and the infrastructure would continue to be run by Iarnród Éireann.

Conclusion

Overall, the Rosslare-Waterford-Limerick rail corridor represents an important component of national, regional and local transport infrastructure that provides a critical sustainable linkage to key Gateways and Hubs within the south-east, mid-west and south-west regions of Ireland. The presence of the rail line will also influence the delivery of sustainable settlement strategies as set out in the Regional Planning Guidelines and County Development Plans allowing for future sustainable growth and development. The complete rail corridor's economic, social and tourism potential has not been maximised and it is considered in particular the Rosslare-Waterford segment has a significant contribution to make in this regard.

It is clear that all relevant policy supports and strengthens the continued operation and future development of the rail corridor to ensure sustainable transport infrastructure and accessibility to the regions. It is evident from the comparative analysis that demand from the travelling public for a modern, frequent rail service between the key centres of Wexford and Waterford should be substantial, and substantially greater than contemplated by Iarnród Éireann. We believe that, with a Community Rail Partnership approach, the prospects for the Rosslare-Waterford-Limerick rail line and specifically the Rosslare-Waterford segment are highly positive, for the South-East and Mid-West regions, for the nation and for the rail network.

The conclusive analysis leads this submission to conclude that the evidence base does not support the proposal to terminate passenger services on the Rosslare-Waterford line but instead supports the alternative of providing a sustainable, substantially more frequent passenger service that is capable of attracting passenger traffic from the key markets for public transport in the region.

Accordingly, the central recommendation is that the NTA does not approve the proposal to close passenger services on the Rosslare-Waterford rail line. We identify a number of more detailed recommendations, including on the development of a CRP approach, that would enable economically sustainable passenger rail services on the Rosslare-Waterford-Limerick rail line.

SECTION ONE

PURPOSE AND APPROACH

1.0 PURPOSE AND APPROACH

1.1. The Need for this Study

The South-East Regional Authority (SERA), together with the Mid-West Regional Authority (MWRA), are two of the eight regional authorities established in Ireland with effect from 1st January, 1994 under the provisions of the Local Government Act 1991, (Regional Authorities) (Establishment) Order, 1993. The SERA covers the six local authority areas of Carlow, Kilkenny, South Tipperary, Waterford City, Waterford County, and Wexford. The MWRA covers the four local authority areas of Clare, Limerick and North Tipperary and Limerick City.

Iarnród Éireann has submitted a proposal to the National Transport Authority (NTA) seeking authorisation to cease the Rosslare to Waterford City passenger rail service. This proposal, which we consider contains a number of critical aspects which are flawed, is strenuously opposed by the SERA, MWRA, their respective constituent local authorities (authorities charged with the proper planning and sustainable development of their administrative areas), and by a range of public and private organisations and stakeholders.

One of the principal functions of the Regional Authorities is the review of the overall development needs of the regions and the making of statements on them as appropriate, and keeping under review the provision of public services in the region. In this respect, both the SERA and MWRA, together with their respective constituent local authorities, wish to strenuously oppose any proposals by Iarnród Éireann to cease passenger rail services on the Rosslare to Waterford rail lines and to downgrade any part of the South-East and Mid-West Region's rail network particularly on the Rosslare-Waterford-Limerick rail corridor.

The Rosslare-Waterford-Limerick line is a key element of the regions' well-developed rail network that provides an important public transport service link with principal urban settlements in the South-East, with Limerick in the Mid-West and onwards to the West via the Western Rail Corridor and also links with the major ports and airports both regionally and nationally. The line also connects with the Rosslare-Wexford-Dublin line, the Waterford-Kilkenny-Carlow-Dublin line and the Cork-Dublin line. Put simply, the regional rail network is a vital strategic transport asset. In addition to providing rail access to the regions generally, it also serves the South-East Regions two national ports at Rosslare Harbour/Europort and Waterford Port at Belview. The SERA has consistently called for the regional rail network to be upgraded and improved, not least through the *Regional Planning Guidelines for the South-East Region* with a similar promotion of rail use incorporated in the *Regional Planning Guidelines for the Mid-West Region*. Regional development is fundamental to national economic recovery and growth and the provision of railway transportation as part of an integrated transportation network is a key consideration in this regard.

The SERA, in association with the MWRA, commissioned KSA, Imrecon and Fisher Associates to examine the Rosslare-Waterford-Limerick rail corridor and in particular the Rosslare-Waterford element and to assess the potential of the line. A robust socio-economic and business case is set out within this report in order to demonstrate how the rail line is of strategic and fundamental importance on a local and regional level and also as part of a broader national rail network. The SERA will continue to actively refute Iarnród Éireann's proposal and to campaign in support of the optimisation of the rail line's potential. The SERA thus respectfully requests that the NTA give due regard and favourable consideration to the context and content of this socio-economic and business case in assessing Iarnród Éireann's proposal to cease passenger rail services on the Rosslare to Waterford City rail line.

1.2. Scope and Structure of Study

This Study has been formulated with an overarching objective of equitably and transparently assessing and quantifying the strategic economic, environmental and social importance and impact of the Rosslare-Waterford-Limerick rail corridor to/on the micro and macro economies (local and regional) of the South-East and Mid-West Regions.

'*Future-proofing*' has been carried out within the Study through the socio-economic and business case formulation, with an assessment of future regional economic and social needs (from both a passenger and freight perspective) for the Rosslare-Waterford-Limerick rail corridor, and a viable, deliverable vision for the operation of an efficient and sustainable passenger and rail freight service for the South-East and Mid-West regions is set-out.

A host of factors are identified, in conjunction with a range of recommendations, which make the socio-economic and business case for the rail corridor's maintenance, upgrading and improvement in line with the demonstrated vision.

The Study is set out in a number of sections, which represent the sequential stages and components of the project, and the following provides an overview to these sections:

- The following section, Section 2, sets out a characterisation of the Rosslare-Waterford-Limerick rail corridor particularly in terms of the overall regional context, the defining the study catchment area and assessing the corridor's demographic and socio-economic status.
- Section 3 explores and demonstrates the extent of European, national, regional and local planning, transportation and environmental policies, objectives and guidelines that are directly relevant to the Study. This library of information will guide the overall policy analysis of the Study and ensure a robust and consistent assessment.
- Section 4 details the socio-economic and business case pertaining to the rail corridor and its future maintenance, configuration and upgrade in respect of both passenger and freight services. The socio-economic and business case has been informed greatly by a range of stakeholders, each with valid and important opinions on the rail line and its continued operation into the future. The various strands which combine to represent the business case model centred on the UK Community Rail Partnership approach have been formulated by the authors through the interpretation and advancement of stakeholder input and initial ideas, and interweaving these with an appropriate level of social, economic and environmental consideration.
- The socio-economic and business case is followed by a comprehensive and vigorous rebuttal of Iarnród Éireann's 'rationale' for the proposed cessation of passenger rail services on the Rosslare-Waterford rail line, in Section 5. It is submitted that the cessation of passenger services on a region's rail line, during a time of unprecedented national and global economic threat (and having regard to the continued re-opening of previously ceased rail lines in other parts of the country) is neither warranted nor acceptable merely as a result of a reduced subvention to the rail line operator (Iarnród Éireann). The importance of regional development should not be underestimated or neglected as part of a balanced and sustainable approach to national development.
- A summary of the key Study findings together with realistic and achievable recommendations are provided in Section 5 which brings together the detailed evidence-based approach adopted in the preparation and formulation of this report.

The overall Study report structure has been formulated to represent a constructive, comprehensive input to the NTA's deliberations, and the Study reflects a robust evidence-based case for the continuation of the passenger rail services on the Rosslare-Waterford rail line and the future promotion and enhancement of the entire Rosslare-Waterford-Limerick rail corridor, with demonstrable short, medium and long term benefits.

1.3. Study Methodology

The overall study methodology for this submission is centred on an evidence-based approach that incorporates quantitative and qualitative baseline and projected analysis. The rail corridor catchment area determination is based on robust analysis techniques. Spatial and transportation planning assessment has been undertaken including analysis of European, national, regional and local planning policy and guidance, and an assessment of the future development of the regions (with adequate rail line services and facilities). Key data sets have been used throughout the report with particular application of the Census Statistics Office (CSO) Census 2006, CSO Place of Work Census of Anonymised Records (POWCAR) 2006 and Department of the Environment, Heritage and Local Government National Population Projections and Regional Population Targets 2010 to 2022. Both strategic spatial planning and economic forecasting techniques including SCOT (Strength, Constraints, Opportunities and Threats) Analysis and Cost/Benefit Analysis (CBA), respectively, have been applied in the preparation of this study particularly in terms of viability determination and future-proofing assessment. The application of Geographical Information System (GIS) analysis has been central to the data analysis and visualisation outputs.

An integral element of the study methodology has been the engagement and consultation with key stakeholders with important community engagement which focused on not only the social dimension but also economic, environmental and other important considerations. Effectively, the proposed cessation of the passenger rail services between Rosslare and Waterford would result in the removal of what is essentially a regional community service; therefore, it is reasonable to expect that community input should be carefully considered. The 'social licence' for the operation of Iarnród Éireann services, given their obvious and core role within communities and linking multiple regions, should have triggered a requirement for the rail operator to seek the views of the corridor population. An acknowledgement that the rail service relies on the

community, in tandem with the fact that the community often relies on the rail service (as a mode of transport) would infer the appropriateness that the regional community is consulted and has a say in the future operation of the railway line.

Therefore, this study has actively encouraged the in-depth exchange of views and information, giving rise to joint analysis and permitting a more considered decision-making/recommendation approach. When a stakeholder is, or could potentially be, materially affected by a project, it is imperative that these persons are kept fully informed and are encouraged to participate in a balanced and transparent consultation process. Over the Study period, the project team has sought the views of a wide range of key stakeholders to establish their attitudes to the development of the entire rail corridor from Rosslare to Limerick. The methods of consultation included face-to-face meetings, telephones conversations and email correspondence.

Consultation has been extensively conducted with the project steeping group for this project, namely, the SERA, the MWRA and the local authorities within the SERA and MWRA areas.

In addition, consultation was engaged in with the following (in no particular order):

- Minister of State Ciaran Cuffe with special responsibility for Sustainable Transport, Horticulture, Planning and Heritage, in order to present an overview of the structure of the study and to set out the socio-economic and business case for the continued operation of the rail line;
- The NTA, in order to establish the essence of the NTA's initial perspective on the matter and to facilitate a transparent and balanced debate on the matter at hand;
- Iarnród Éireann, such that the we could derive the perceived justification for the proposed cessation of the passenger rail services during a time when previously closed rail lines and services throughout Ireland are being reopened and upgraded and reintroduced, respectively;
- Southern and Eastern Regional Assembly and South-East Chambers (the representative body for all Chambers in the South-East Region) to gain a full understanding of the regional importance and implications for rail transportation;
- Fáilte Ireland and the Health Service Executive, to establish considerations from tourism and health related perspectives;
- Industrial Development Authority (IDA) South-East Region, Shannon Development and Enterprise Ireland, such that the we could assess the rail line from a freight and logistics industrial perspective;
- Association of Community Rail Partnerships (ACoRP, UK) and Network Rail UK, to discuss the merits, justification and rationale for a similar such approach along the subject rail line;
- Relevant community groups, including Save the Rosslare to Waterford Rail Line Committee and Rail Users Ireland organisation, in order to garner more complete understanding of the current position from an end-user perspective;
- Major industries, port companies and business interests within and adjacent to the Rosslare-Waterford rail corridor to gain a detailed understanding of the rail freight potential;
- Third-Level Education Institutes served by the Rosslare–Waterford–Limerick rail corridor, namely Waterford Institute of Technology, Limerick Institute of Technology, Tipperary Institute (Clonmel Campus), Institute of Technology Carlow (Wexford Campus) and the University of Limerick, to determine student usage potential;
- South-East Regional Airport, Shannon Airport, Port of Waterford and Shannon Foynes Port Company to assess the integrated transport connectivity potential of the complete rail corridor

The findings of the stakeholder consultation have been carefully considered and incorporated into the overall study analysis and preparation.

In undertaking this study, careful attention has been given to both the NTA's Social Impact Estimation Methodology and the Department of Transport's Guidelines on a Common Appraisal Framework for Transport Projects and Programmes. The following provides a brief summary of both:

Social Impact Estimation Methodology (National Transport Authority, May 2010)

The National Transport Authority (NTA) has established a framework for the evaluation of social benefits pertaining to the discharge of public service obligations (PSO), to facilitate a practical and timely assessment of where resources need to be prioritised. The maximum social benefit can therefore be sought from the funding provided to the CIE Group of Companies. Socially necessary services can be maintained or changed based on decision making that is informed by the application of this framework.

The purpose of the methodology is to engage in comparative analysis between existing services. It is not suitable for assessing the viability of or to support any case for any new or enhanced services. While the Social Impact Estimation Methodology is this not suited to direct application in this Study, it nonetheless represents a guiding principle in the assessment of social impact.

The Department of Transport's Common Appraisal Framework (CAF, 2009) is another methodological guidance for the appraisal of services.

Guidelines on a Common Appraisal Framework for Transport Projects and Programmes (Department of Transport, June 2009)

The Common Appraisal Framework (CAF) is an objectives led framework that employs a combination of multi-criteria and cost-benefit approaches. It looks at the impact of projects in terms of Economy, Safety, Environment, Accessibility and Social Inclusion and Integration. The various benefits and costs of a project may be brought together through the framework's Project Appraisal Balance Sheet, which also facilitates those benefits and cost without a monetary value.

The guidelines recommend a range of sensitivity analyses that test the sensitivity of the appraisal to a set of risk factors. While it is unnecessary to explicitly follow the CAF given the nature of the Study, it does however represent a logical approach and has thus been considered over the course of the project team's endeavours.

In preparing this study we are mindful of the findings and recommendations of the Report of the Special Group on Public Service Numbers and Expenditure Programmes prepared on behalf of the Government 2009. The following provides a brief synopsis of the objectives of this report:

Report of the Special Group on Public Service Numbers and Expenditure Programmes 2009

The Government announced, in its Statement on *Transforming Public Services* on 27 November 2008, that the Minister for Finance, Brian Lenihan T.D., was establishing a *Special Group on Public Service Numbers and Expenditure Programmes* to examine the then current expenditure programmes in each Government Department and to make recommendations for reducing public service numbers so as to ensure a return to sustainable public finances.

The key objective of the Special Group was to identify specific options for reducing current spending and the numbers employed in the public service, incremental to the expenditure reductions and efficiencies introduced over the past year, and consistent with the budgetary consolidation requirements.

In assessing the scope for savings in each area of expenditure, the Group considered each programme from first principles insofar as possible. This involved raising basic questions such as the necessity for provision of the service, and the reasons why public service provision might be warranted, rather than allowing the private sector to provide the service.

The Group also examined the means of providing services, and whether these could be delivered more efficiently through streamlined structures and processes or through outsourcing to the private sector. The continued provision of universal services or payments and the scope for charging users were assessed in determining the scope to reduce the overall net cost of programmes and ensure better use of scarce resources while still delivering services to those that need them.

In arriving at its recommendations for savings, the Group assessed what it considers to be the relative priority of individual programmes and the affordability of these programmes in light of the budgetary crisis facing the country at present.

SECTION TWO

CHARACTERISING THE CORRIDOR

2.0 CHARACTERISING THE CORRIDOR

2.1. Regional Context

South-East Region

The South-East region comprises the five counties of Carlow, Kilkenny, South Tipperary, Waterford and Wexford. The region encompasses c. 13.5% of the area of the State, with c. 10.9% of the national population, at 460,838 (2006 Census). It is estimated that the population of the region will increase to 507,900 in 2010. The region benefits from a well balanced urban structure, with the main urban centres (Waterford City, Kilkenny City and the towns of Carlow, Wexford and Clonmel) each having populations in excess of 17,000 persons. These main urban centres are augmented by a range of 'second' and 'third' tier towns evenly distributed throughout the region, with a strong rural settlement pattern also evident.

The existing infrastructure (road, rail and port etc.) form an essential element in making the region attractive for investment, combined with the three Third Level Education institutes, a young and educated labour force, together with a network of Industry and Technology Parks across the region. Agriculture, manufacturing and services, tourism, fishing and aquaculture form the basis of the regional economy. The region attracts in excess of 2 million visitors annually.

Mid-West Region

The Mid-West Region consists of counties Clare, Limerick and North Tipperary. It encompasses approximately 10% of the national land area and approximately 8.6% of the population of the country, at 361,028 (2006 Census). It is estimated that the population of the region will increase to 383,800 in 2010. The region benefits from areas of strong urban growth, not least the Limerick/Ennis/Shannon triangle, which includes Limerick City (regional capital), Shannon Airport, Ennis Information Age Town and the Third-Level Education Institutes in Limerick and Thurles.

The region also contains a number of rural areas challenged with persistent population decline which constrains an optimal level of regional consciousness. Industry in the region is centred on the urban centre of Limerick, Ennis and Shannon Town with industry dominated by light industry (e.g. electronics, engineering etc.). North Tipperary holds a strong Food Processing base, coupled with pharmaceutical and healthcare sectors. The Rosslare-Waterford-Limerick rail line also represents an important component of this region's physical infrastructure.

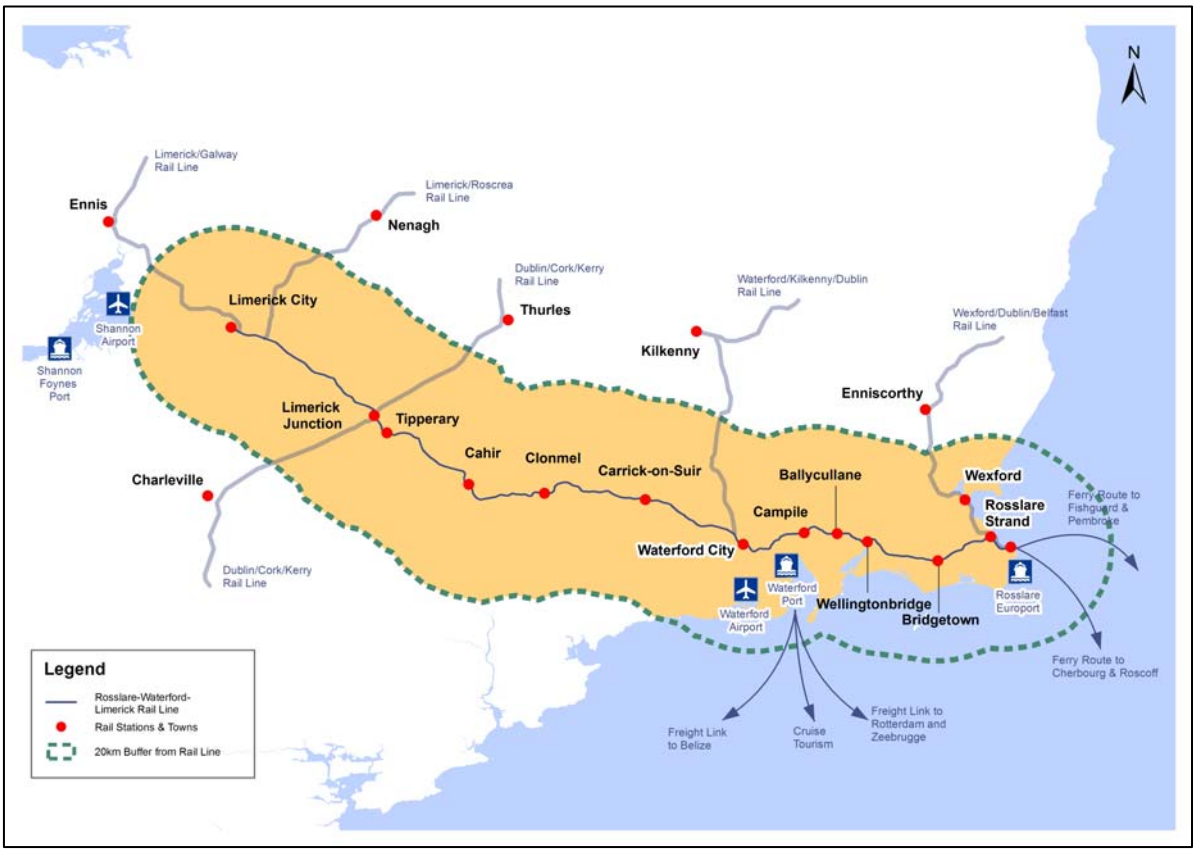
2.2 Defining the Study Catchment Area

The project team initiated the study using a 20 kilometre (km) catchment, i.e. assessing the rail line using a notional buffer of 20km either side of the overall rail line (Rosslare-Waterford-Limerick) to represent the potential 'catchment' of those that could use/be impacted by the service along the Rosslare-Waterford-Limerick rail line (or proposed lack of a complete service). The 20km buffer also has due regard to the fact that the rail line is part of a wider national railway network with a continuously improving physical infrastructure base and rolling stock. The rail corridor must therefore be reflective of the fact that the overall line is connected, and connects, national and regional gateways and hubs, as designated under the National Spatial Strategy 2002-2020 (2002). As such, the wider rail line has been initially studied using a 20km catchment buffer, in conjunction with a similar catchment consideration for the specific segment subject to the Iarnród Éireann proposal for closure (i.e. between Rosslare and Waterford).

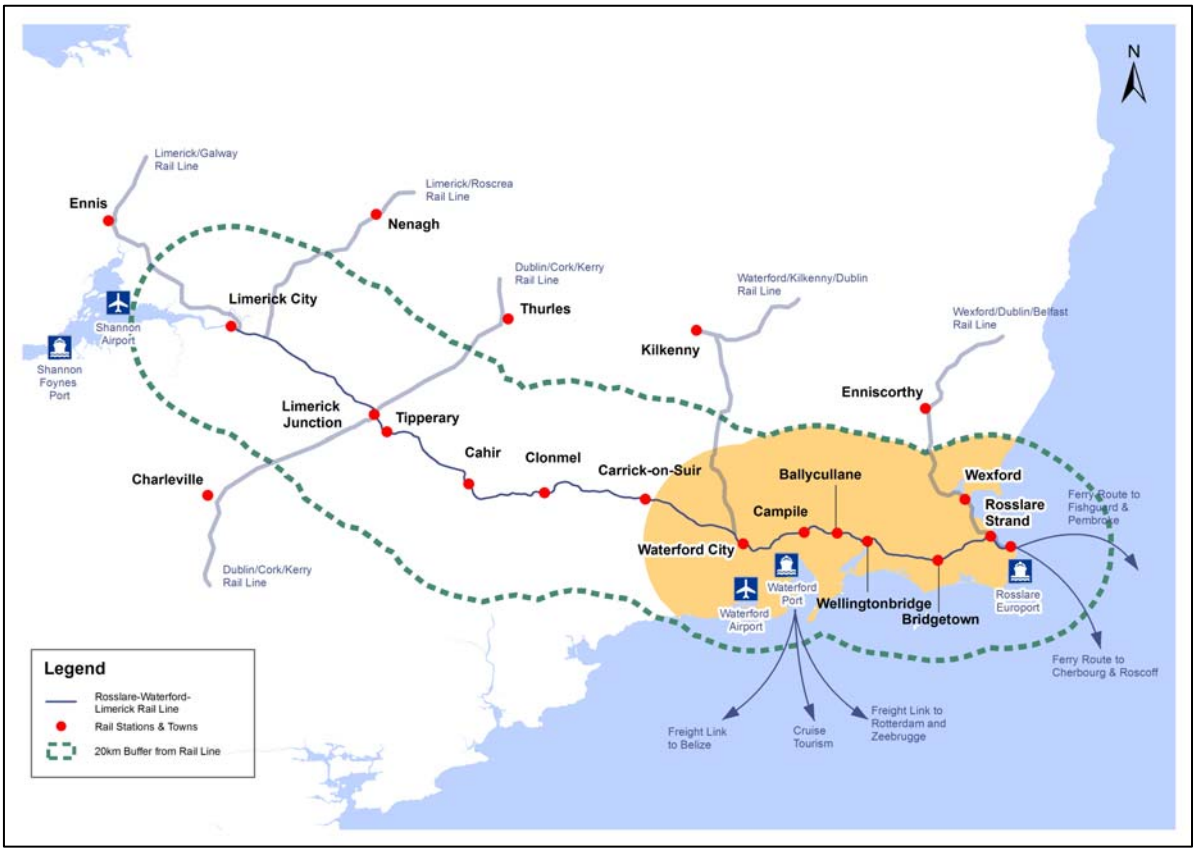
For the more detailed analysis, we have focussed on a 10km catchment buffer around both the overall rail line and the specific segment of rail line that it is proposed to cease the passenger rail services, i.e. Rosslare-Waterford. This more sensitive and restricted catchment buffer has been used for the following

strands within this study: socio-economic and business case data analysis; Place of Work - Census of Anonymised Records (POWCAR) data analysis; detailed population and density analysis; potential rail passenger user analysis.

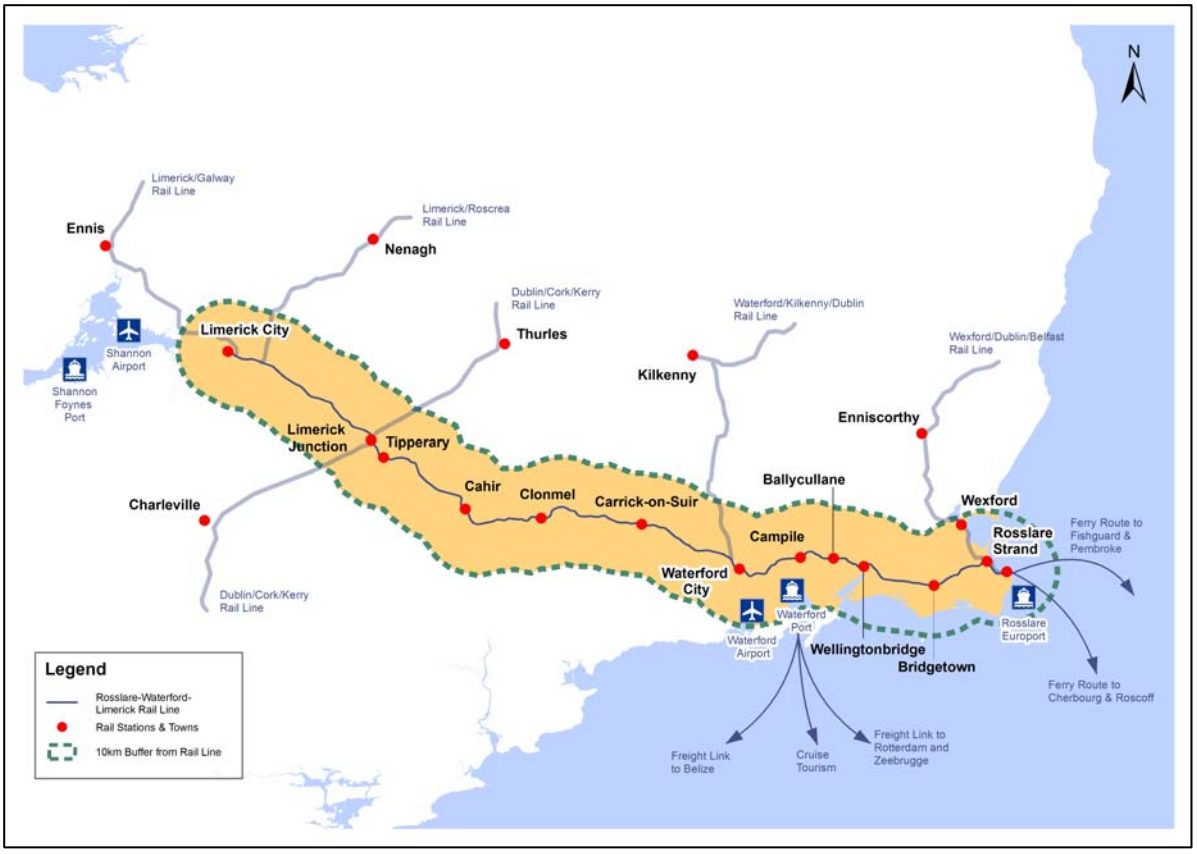
Both the 20km and 10km catchment buffer for the complete Rosslare-Waterford-Limerick corridor and the related Rosslare-Waterford segment are illustrated in Maps' 2.1, 2.2, 2.3 and 2.4. The reason for a more refined 10km catchment analysis is to facilitate a robust and equitable study and having regard to the fact that it permits a more focussed approach that also integrates with the Community Rail Partnership (CRP; a concept discussed later in this study – see Section 4) and best practice therein. The importance of a catchment analysis that is both reflective of an area wherein the rail corridor and the related cessation of the passenger rail services between Rosslare and Waterford should not be underestimated. It also could have an integrated relationship and an impact on the wider externalities beyond the core catchment.



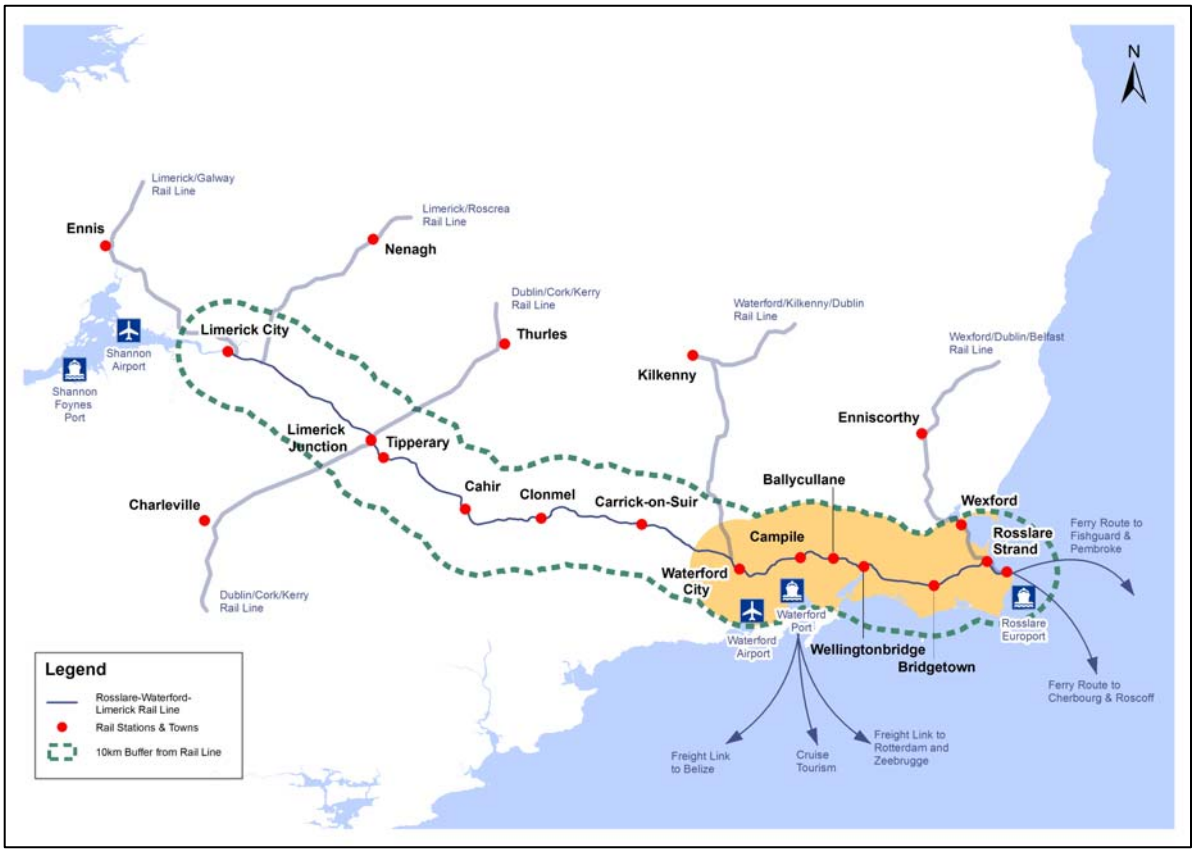
Map 2.1 Rosslare-Waterford-Limerick Rail Line 20km Catchment Buffer



Map 2.2 Rosslare-Waterford Rail Line 20km Catchment Buffer



Map 2.3 Rosslare-Waterford-Limerick Rail Line 10km Catchment Buffer



Map 2.4 Rosslare-Waterford Rail Line 10km Catchment Buffer

2.3 Demographic and Socio-Economic Status

2.3.1 Population Analysis and Projections

Population Analysis 1996-2006

As part of the study analysis, and in order to provide a level of description for the railway corridor, a detailed assessment of the population of the South-East Region, the Mid-West Region and the study catchment area was carried out. The populations of both the South-East and Mid-West Regions have increased substantially from 1996 and 2006. Tables' 2.1 and 2.2 clearly illustrate the population growth within the South-East and Mid-West Regions from 1996 to 2006.

The population of the South-East Region increased from 391,517 persons in 1996 to 460,838 persons in 2006 representing a 17.71% increase in population over this time period. Wexford County experienced the largest increase in population over this time period with a 26.23% increase in population. Waterford City experienced the lowest growth in population in the region with a 7.54% increase in population over the 10 years.

The Mid-West Region also experienced a substantial increase in population from 1996-2006. The population of the Mid-West Region increased from 317,069 persons in 1996 to 361,028 persons in 2006 representing a 13.86% increase in population over this time period. Clare County experienced the fastest growth in population within the 10 years with an 18.02% increase in population. Limerick City experienced the lowest growth in population over this time period with a 0.96% increase in population.

Area/Region		Population 1996	Population 2002	Population 2006	% Change - 1996-2002	% Change - 2002-2006	% Change - 1996-2006	% of Total Region Population - 1996	% of Total Region Population - 2002	% of Total Region Population - 2006
South-East Region	Waterford City	42,540	44,594	45,748	4.83	2.59	7.54	10.87%	10.53%	9.93%
	Kilkenny	75,336	80,339	87,558	6.64	8.99	16.22	19.24%	18.97%	19.00%
	Wexford	104,371	116,596	131,749	11.71	13.00	26.23	26.66%	27.52%	28.59%
	Carlow	41,616	46,014	50,349	10.57	9.42	20.98	10.63%	10.86%	10.93%
	South Tipperary	75,514	79,121	83,221	4.78	5.18	10.21	19.29%	18.68%	18.06%
	Waterford County	52,140	56,952	62,213	9.23	9.24	19.32	13.32%	13.44%	13.50%
	South-East Region Total	**391,517**	**423,616**	**460,838**	**8.20**	**8.79**	**17.71**	**100.00%**	**100.00%**	**100.00%**

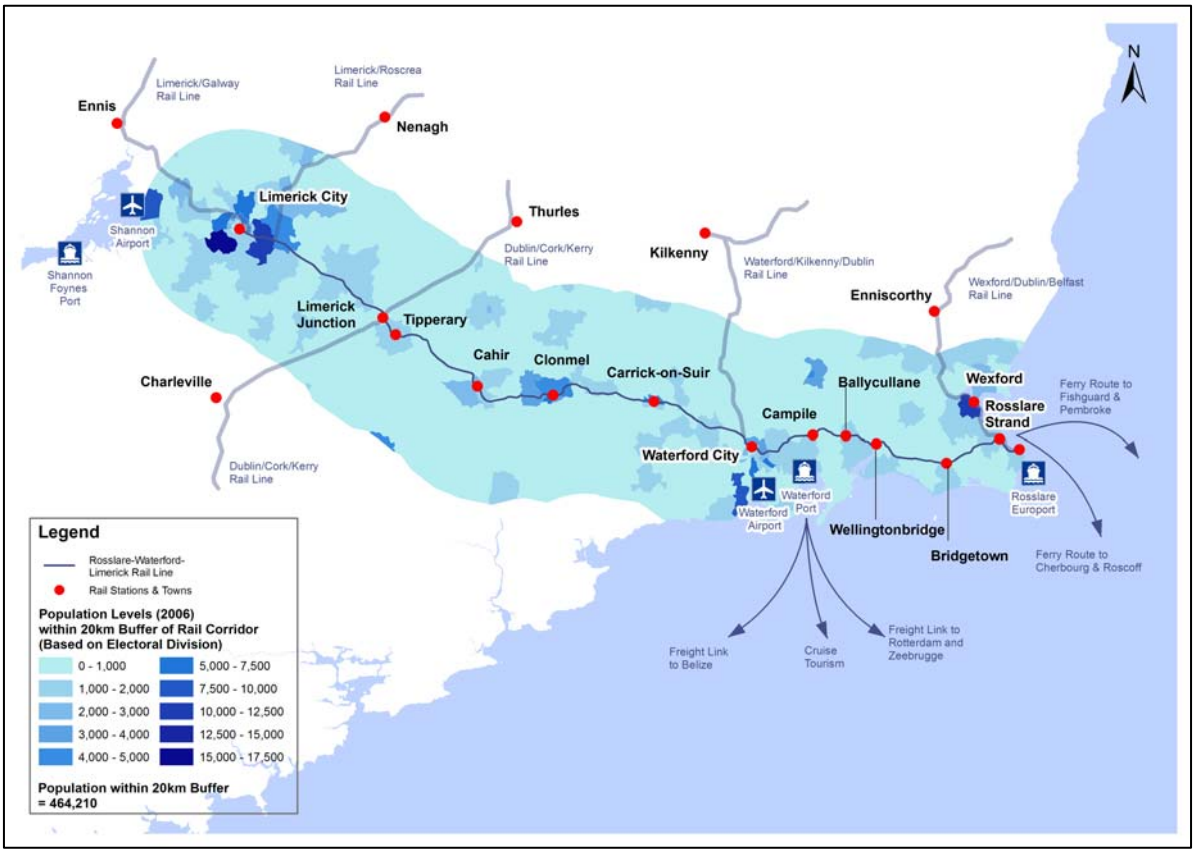
Table 2.1 South-East Region Population Growth 1996-2006

Area/Region		Population 1996	Population 2002	Population 2006	% Change - 1996-2002	% Change - 2002-2006	% Change - 1996-2006	% of Total Region Population - 1996	% of Total Region Population - 2002	% of Total Region Population - 2006
Mid-West Region	Clare	94,006	103,277	110,950	9.86	7.43	18.02	29.65%	30.41%	30.73%
	Limerick County	113,003	121,281	131,516	7.33	8.44	16.38	35.64%	35.71%	36.43%
	Limerick City	52,039	54,023	52,539	3.81	-2.75	0.96	16.41%	15.91%	14.55%
	North Tipperary	58,021	61,010	66,023	5.15	8.22	13.79	18.30%	17.97%	18.29%
	Mid-West Region Total	**317,069**	**339,591**	**361,028**	**7.10**	**6.31**	**13.86**	**100.00%**	**100.00%**	**100.00%**

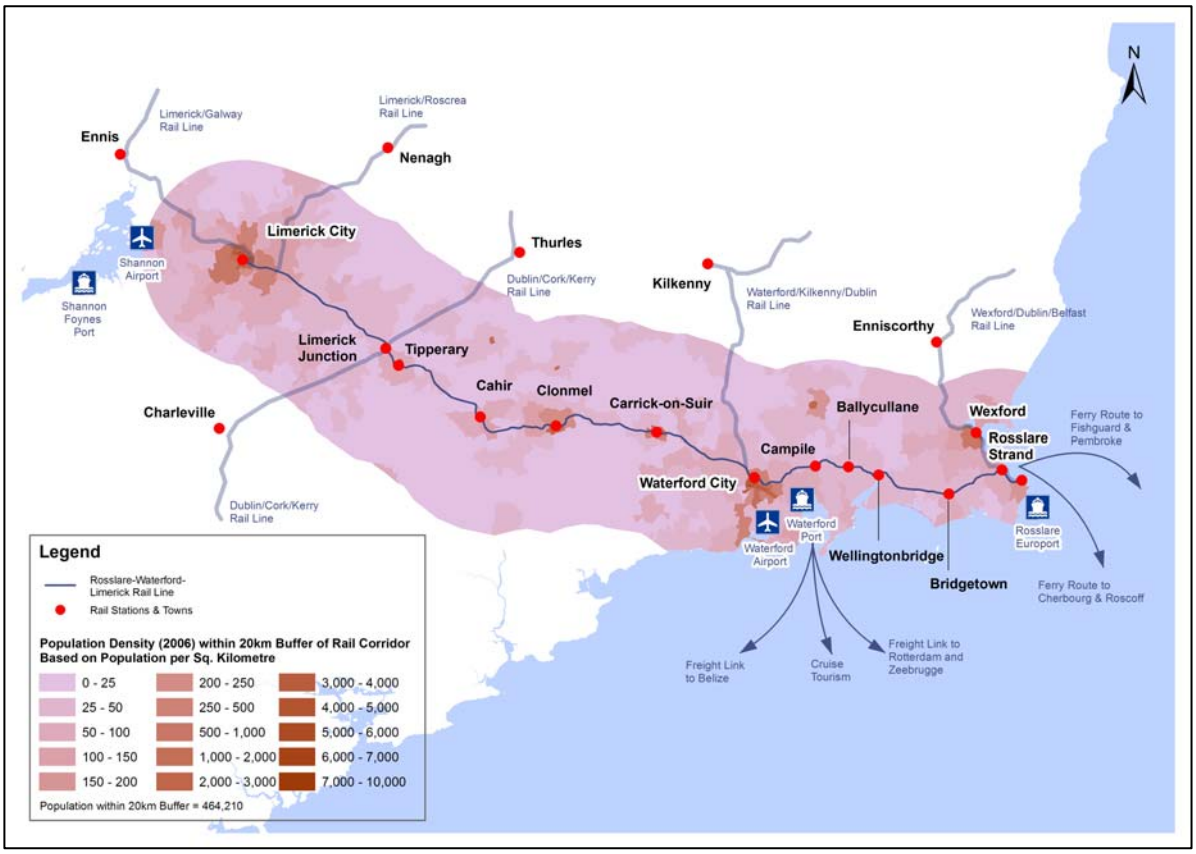
Table 2.2 Mid-West Region Population Growth 1996-2006

Maps 2.5 to 2.8 illustrate the population levels and population density, based on Electoral Division, of the defined catchment corridor, i.e. the Rosslare-Waterford-Limerick rail corridor within a 20km and 10km buffer of the rail line, respectively. There was a population of 464,210 recorded in 2006 within a 20km buffer along the corridor with a population of 316,120 recorded in 2006 within a 10km buffer along the defined catchment corridor.

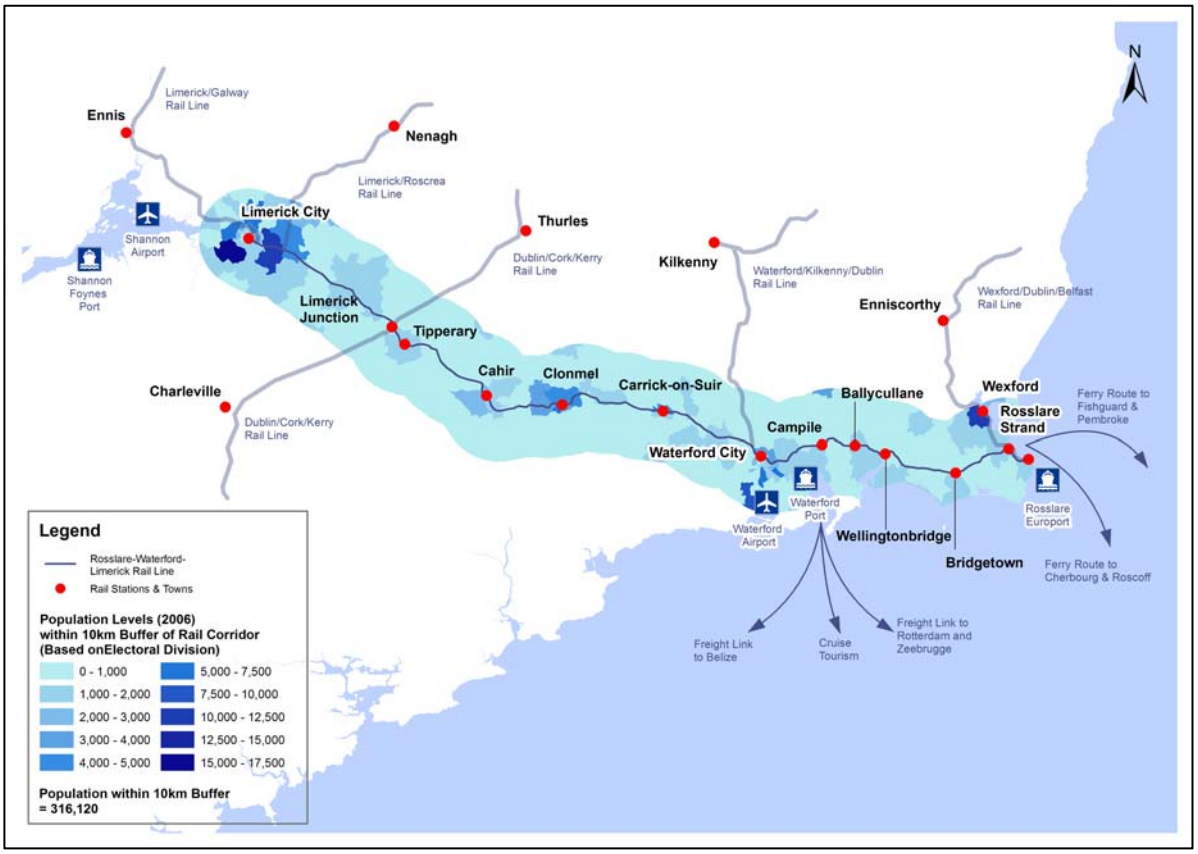
Maps' 2.9 to 2.12 illustrate the population levels and population density of the defined catchment corridor of the Rosslare-Waterford section of the Rosslare-Waterford-Limerick rail corridor within a 20km and 10km buffer of the rail line, respectively. There was a population of 247,710 recorded in 2006 within a 20km buffer along this section of the corridor with a population of 117,920 within a 10km buffer.



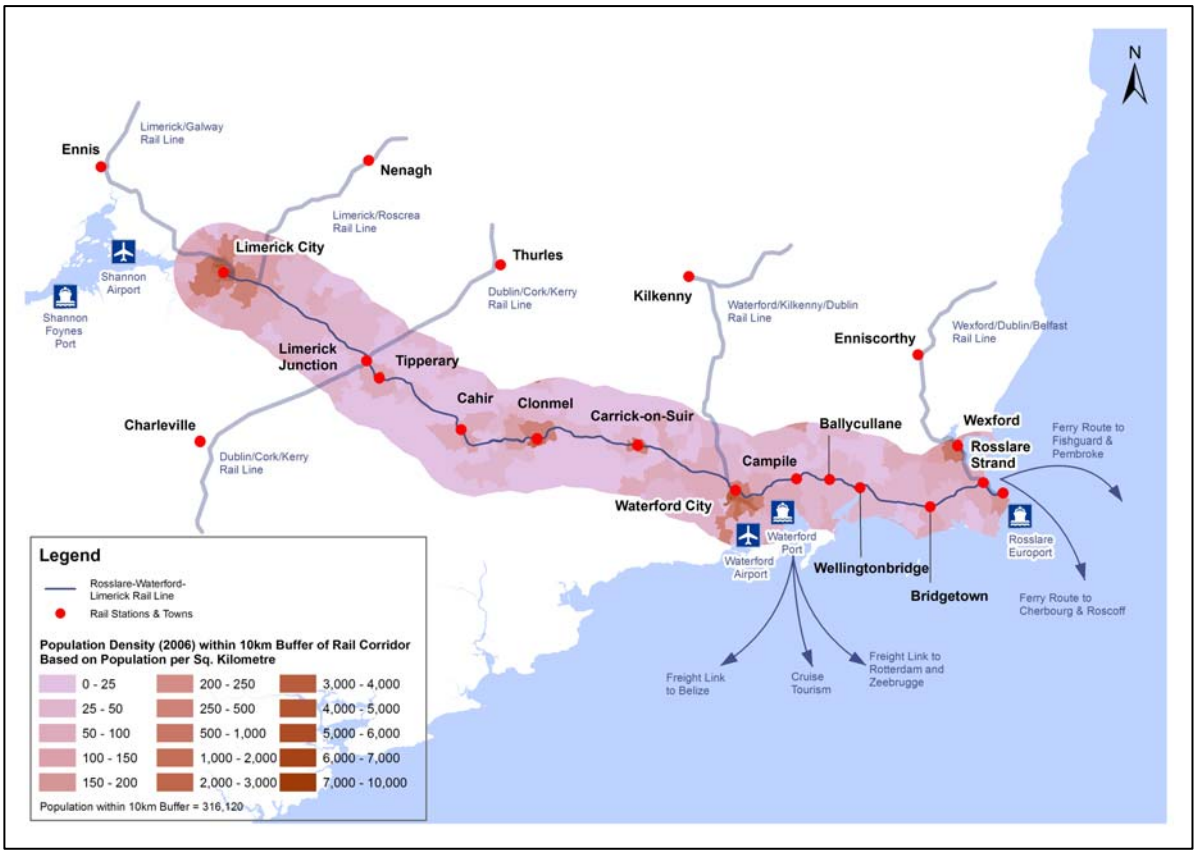
Map 2.5 Rosslare-Waterford-Limerick Population Levels (2006) within 20km Catchment Buffer



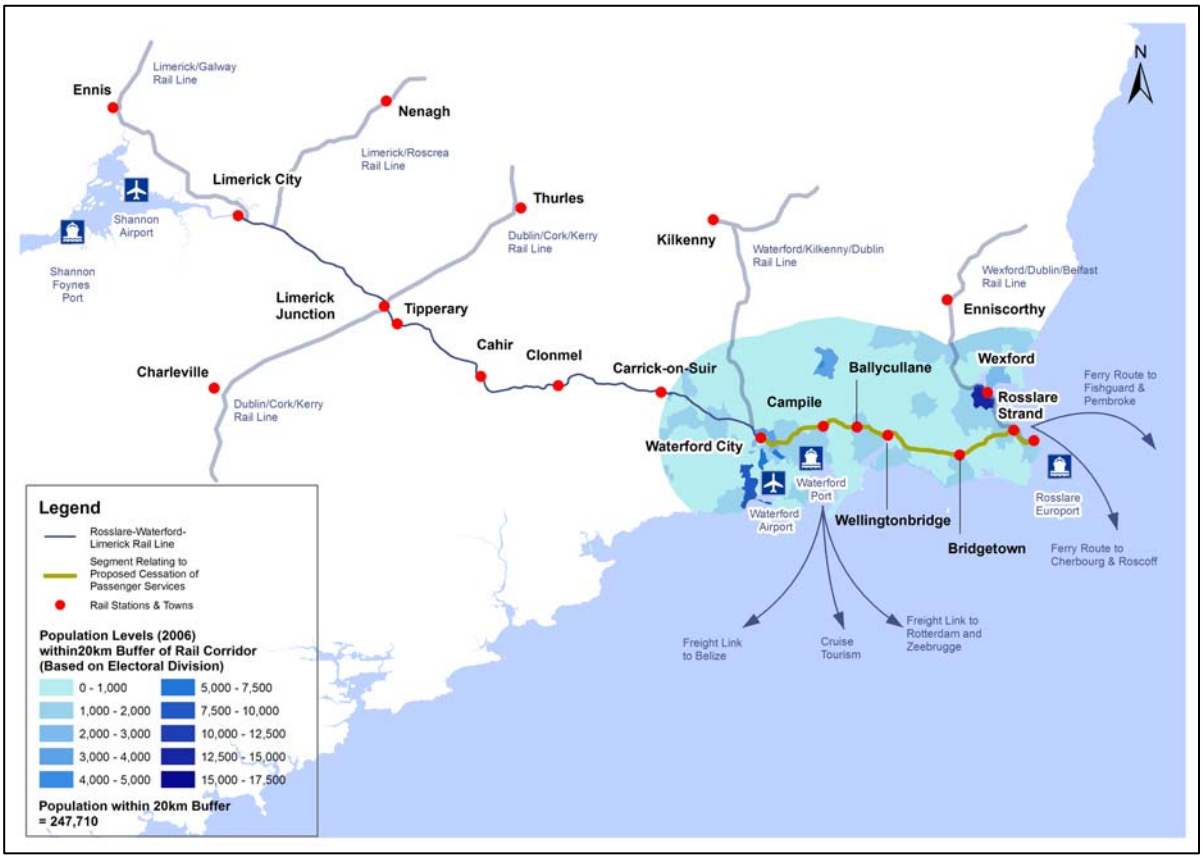
Map 2.6 Rosslare-Waterford-Limerick Population Densities (2006) within 20km Catchment Buffer



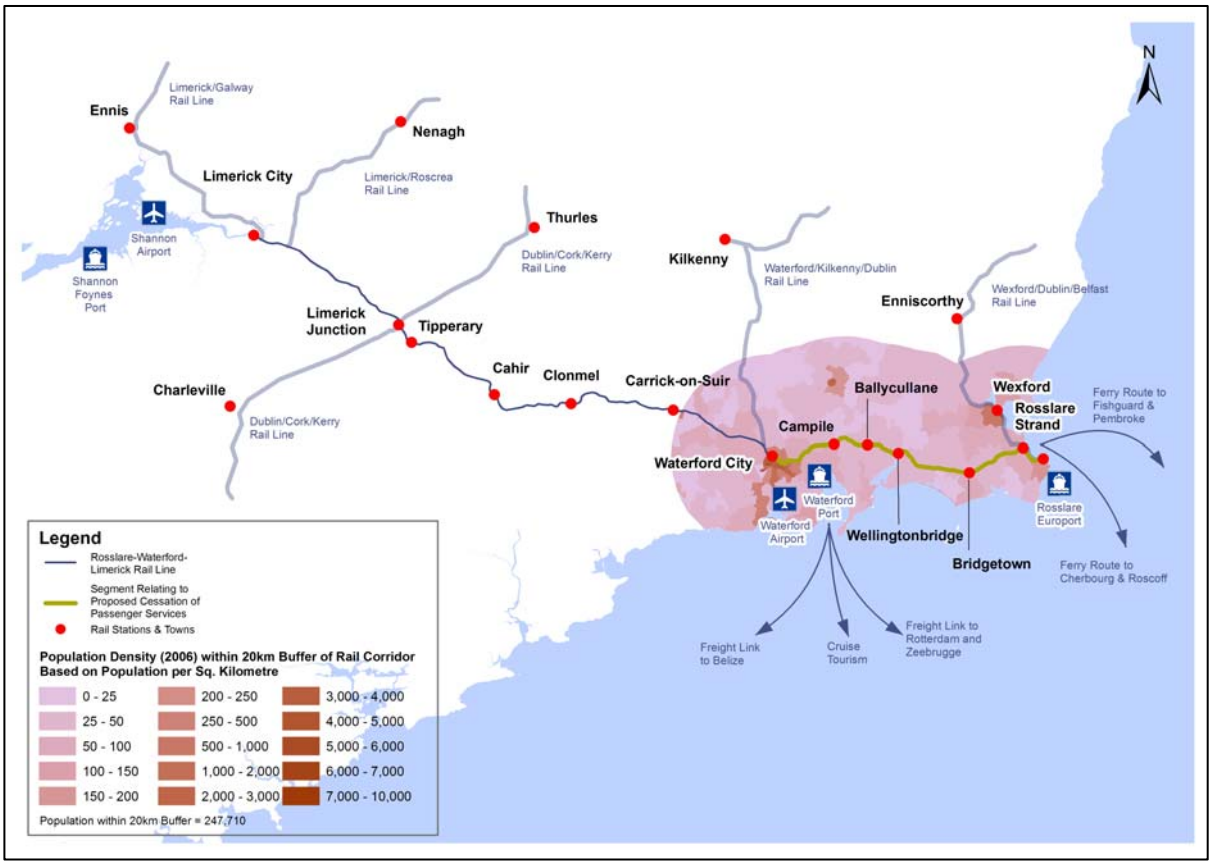
Map 2.7 Rosslare-Waterford-Limerick Population Levels (2006) within 10km Catchment Buffer



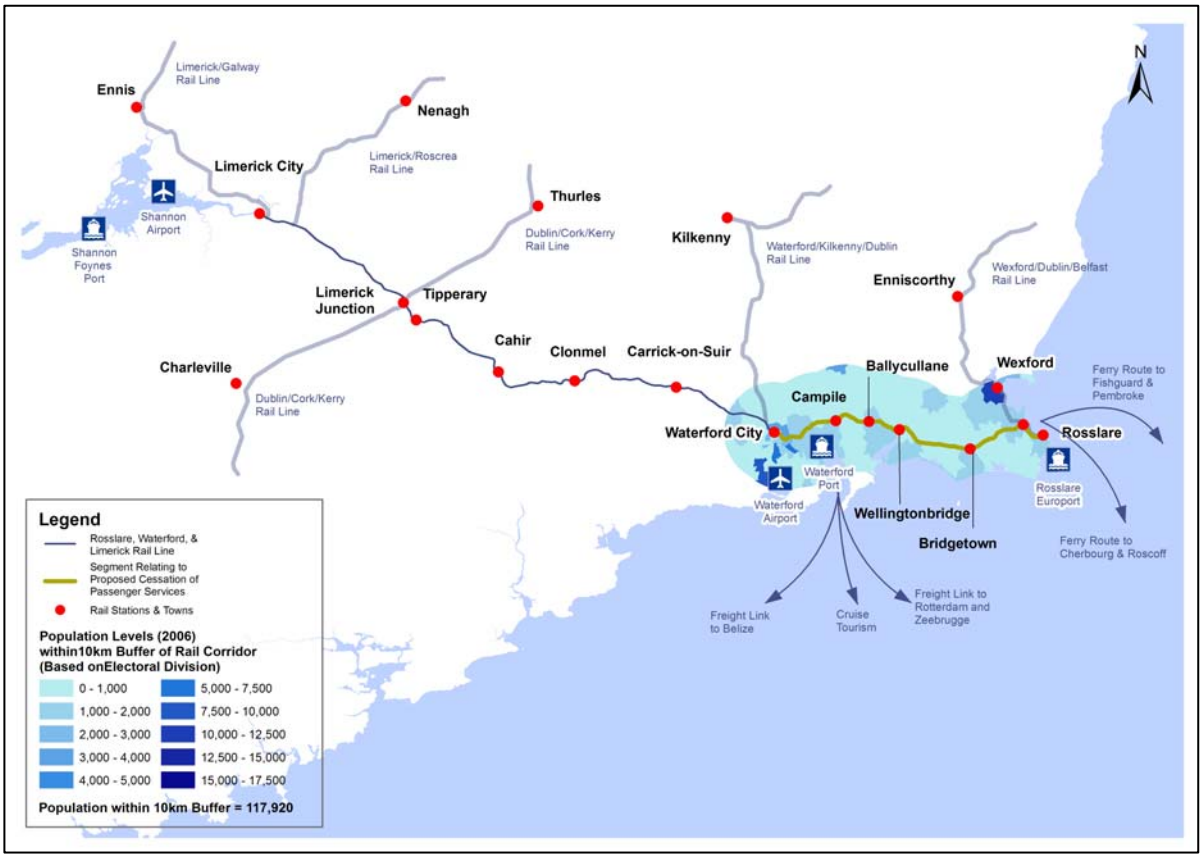
Map 2.8 Rosslare-Waterford-Limerick Population Densities (2006) within 10km Catchment Buffer



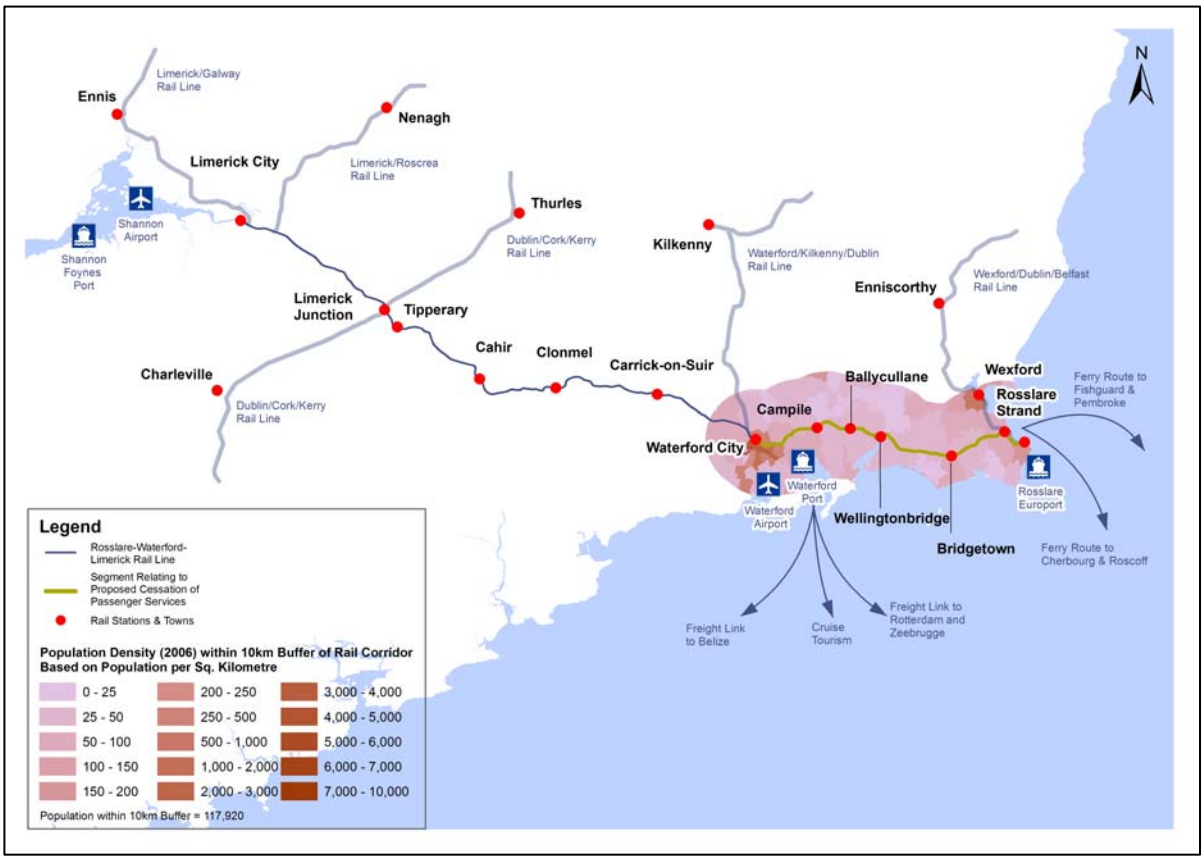
Map 2.9 Rosslare-Waterford Population Levels (2006) within 20km Catchment Buffer



Map 2.10 Rosslare-Waterford Population Densities (2006) within 20km Catchment Buffer



Map 2.11 Rosslare-Waterford Population Levels (2006) within 10km Catchment Buffer



Map 2.12 Rosslare-Waterford Population Densities (2006) within 10km Catchment Buffer

Forecast Population 2008-2022

Based on the Department of the Environment, Heritage and Local Government publication *'National Population and Regional Population Targets 2010-2022'* (January, 2009) it is possible to develop annual population projections for the South-East and Mid-West Regions. These population projections are based on the application of the DoEHLG's target projections at regional level for the years 2008, 2010, 2016 and 2022. These population projections will inform the settlement strategies as set out in the South-East and Mid-West Regional Planning Strategies for 2010-2022. The Regional Planning Guidelines will thus inform the settlement strategies as set out in the various County Development Plans with the regions.

The population for the South-East Region is projected to increase from 487,800 persons in 2008 to 596,500 in 2022 (high growth scenario) as illustrated in Table 2.3 below representing a 22.2% increase in population over this time period. The population of the Mid-West Region is projected to increase from 371,900 persons in 2008 to 475,000 in 2022 (high growth scenario) representing a 27.7% increase in population over the 10-year period.

Region	County	DoEHLG Population Projection (2009)				
		2008	2010	2016	2022 (Low)	2022 (High)
South-East Region	Waterford City	47,495	48,500	51,000	55,000	56,516
	Kilkenny	92,861	96,872	105,598	111,903	114,987
	Wexford	139,909	146,139	156,065	166,083	170,661
	Carlow	53,614	56,155	59,451	63,536	65,287
	South Tipperary	87,891	91,302	96,863	104,483	107,363
	Waterford County	66,030	68,932	73,223	79,495	81,686
	South-East Region Total	**487,800**	**507,900**	**542,200**	**580,500**	**596,500**
Mid-West Region	Clare	114,138	117,608	130,136	139,718	143,556
	Limerick County	134,150	137,059	147,843	154,733	158,984
	Limerick City	55,935	59,648	73,157	87,058	89,450
	North Tipperary	67,677	69,485	76,064	80,791	83,010
	Mid-West Region Total	**371,900**	**383,800**	**427,200**	**462,300**	**475,000**
Overall Total for both Regions		**859,700**	**891,700**	**969,400**	**1,042,800**	**1,071,500**

Table 2.3 DoEHLG Population Projections for the South-East and Mid-West Regions 2008-2022

Based on the projected population levels of both the low and high growth strategies set out above a proposed future settlement strategy for the settlement centres within the 10km catchment buffer of the Rosslare-Waterford-Limerick rail line has been formulated, as illustrated in Map 2.13. A five-tier settlement hierarchy is suggested that incorporates primary, secondary, moderate, local and settlement growth centres, with population designations being established for each. This proposed settlement strategy has been informed by the Regional Planning Guidelines for both Regions and the various City and County Development Plans. The essential realisation within the strategy is the importance of the Rosslare-Waterford-Limerick rail line in linking numerous settlement centres and also establishing a critical sustainable transportation link between two national gateways (i.e. Waterford and Limerick) and one national hub (i.e. Wexford). Overall, this proposed settlement strategy will ensure the establishment of sustainable critical mass and the promotion of sustainable transport utilisation.

Map 2.13 Proposed Settlement Strategy Designations for Settlement Centres within 10km Catchment Buffer of Rosslare-Waterford-Limerick Rail Line

2.3.2 Persons by Principal Economic Status

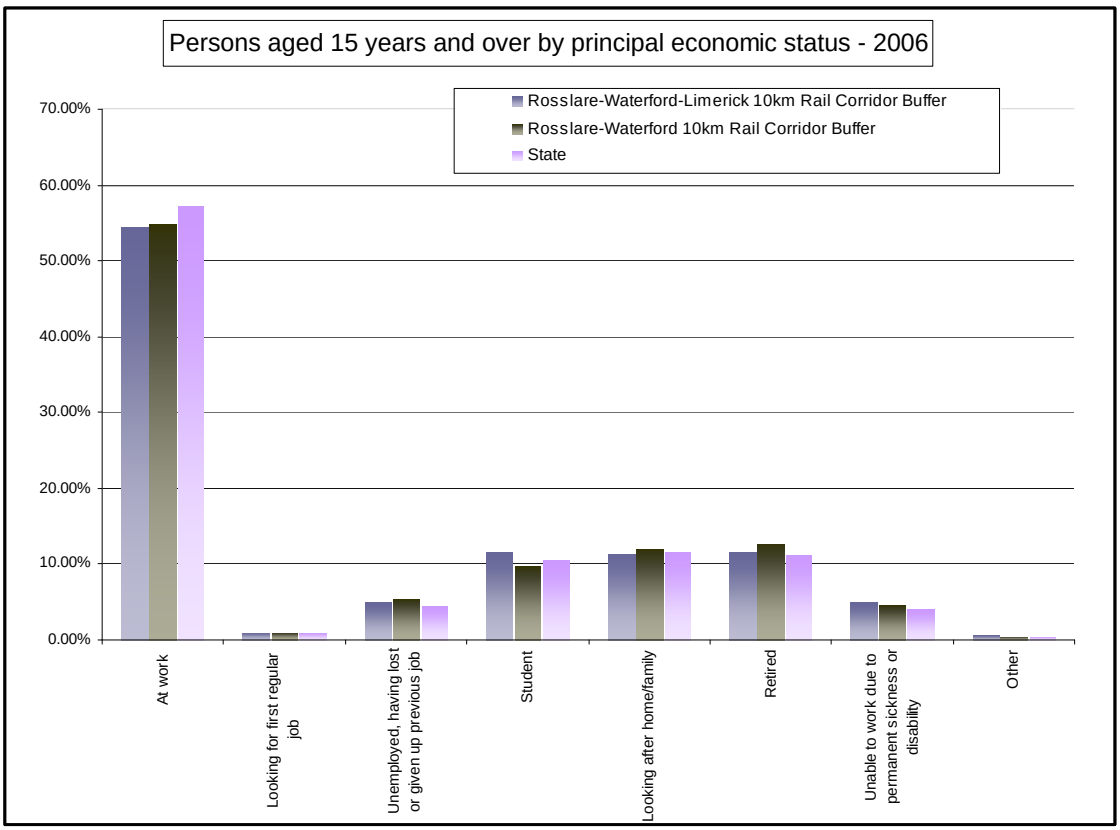
As part of the study analysis, and in order to provide a level of description for the railway corridor, a cursory assessment of the Principal Economic Status of the corridor's population has been compiled and compared with the national average.

Within the identified Rosslare-Waterford rail corridor (i.e. that area specifically related to the segment of rail line proposed for the cessation of passenger rail services), a total of 54.75% of the population (aged 15 years and over) were at work in 2006 (the latest CSO Census year). This is comparable with a percentage of 54.36% in respect of the identified Rosslare-Waterford-Limerick 10 kilometre rail corridor buffer and the national average of 57.18% over the same period. Thus, the level of persons aged 15 years and over and at work within the Rosslare-Waterford segment is effectively consistent with the related percentages for the wider Rosslare-Waterford-Limerick rail corridor buffer and that for the State.

Interestingly, 9.63% of the persons aged 15 years and over within the Rosslare-Waterford segment are classified as 'student', which is comparable with the equivalent percentage, at 11.51%, for the overall rail corridor and the national average, the latter comprising a quantum of 10.36%.The full breakdown if this analysis for the Rosslare-Waterford-Limerick rail corridor, the Rosslare-Waterford rail corridor segment and the State is comprehensively tabled and illustrated in Table 2.4 and Graph 2.1.

	Total	At work	Looking for first regular job	Unemployed, having lost or given up previous job	Student	Looking after home/family	Retired	Unable to work due to permanent sickness or disability	Other
Rosslare-Waterford-Limerick 10km Rail Corridor Buffer	100.00%	54.36%	0.92%	4.91%	11.51%	11.40%	11.53%	4.87%	0.51%
Rosslare-Waterford 10km Rail Corridor Buffer	100.00%	54.75%	0.91%	5.24%	9.63%	11.87%	12.72%	4.53%	0.37%
State	100.00%	57.18%	0.87%	4.45%	10.36%	11.47%	11.20%	4.10%	0.38%

Table 2.4 Persons Aged 15 Years and Over within (within 10km Catchment Buffer of Rosslare-Waterford-Limerick Rail Line, Rosslare-Waterford Rail Line and State) by Principal Economic Status - 2006



Graph 2.1 Persons Aged 15 Years and Over (within 10km Catchment Buffer of Rosslare-Waterford-Limerick Rail Line, Rosslare-Waterford Rail Line and State) by Principal Economic Status - 2006

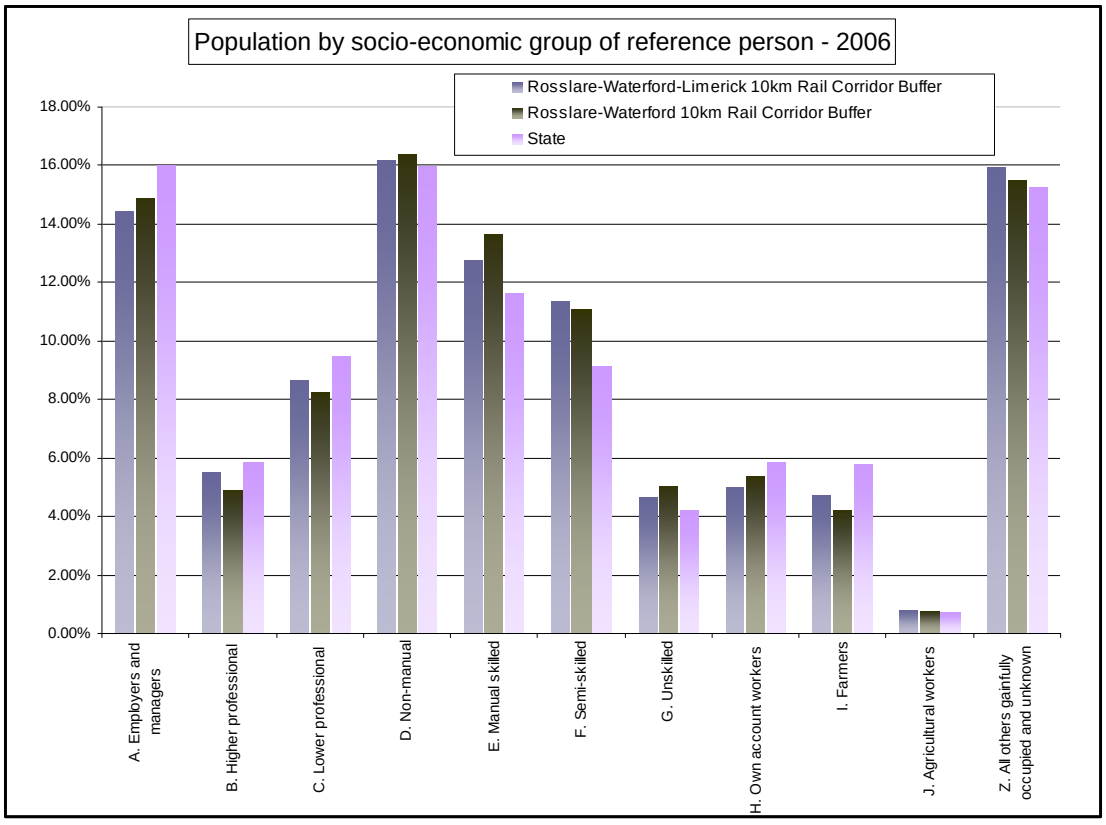
2.3.3 Population by Socio-Economic Group of Reference Person

In order to establish a clear picture of the socio-economic breakdown of the Rosslare-Waterford segment, the CSO data of population by socio-economic group of reference person has been extrapolated for the corridor, coupled with the percentages for the full rail corridor and the national average, for comparison purposes. The percentages derived are broadly comparable, indicating that the area represents a relatively

consistent 'extract' from the wider Rosslare-Waterford-Limerick corridor and the national average. For example, the Rosslare-Waterford segment of the rail corridor identifies 14.89% and 16.39% of persons are classified within the Employers/Managers and Non-Manual groupings respectively. This compares with 14.40% and 16.17% respectively in the same groupings for the entire Rosslare-Waterford-Limerick corridor and 16.02% and 15.99% respectively within these groupings for the national average. The percentage distributions for the Rosslare-Waterford-Limerick rail corridor, the Rosslare-Waterford rail corridor segment and the State are set out in Table 2.5 and Graph 2.2.

	Total	A. Employers and managers	B. Higher professional	C. Lower professional	D. Non-manual	E. Manual skilled	F. Semi-skilled	G. Unskilled	H. Own account workers	I. Farmers	J. Agricultural workers	Z. All others gainfully occupied and unknown
Rosslare-Waterford-Limerick 10km Rail Corridor Buffer	100.00%	14.40%	5.51%	8.68%	16.17%	12.79%	11.35%	4.66%	5.01%	4.70%	0.80%	15.92%
Rosslare-Waterford 10km Rail Corridor Buffer	100.00%	14.89%	4.90%	8.24%	16.39%	13.65%	11.07%	5.06%	5.39%	4.18%	0.75%	15.48%
State	100.00%	16.02%	5.87%	9.47%	15.99%	11.65%	9.16%	4.19%	5.84%	5.82%	0.72%	15.28%

Table 2.5 Population (within 10km Catchment Buffer of Rosslare-Waterford-Limerick Rail Line, Rosslare-Waterford Rail Line and State) by Socio-Economic Group of Reference Person - 2006



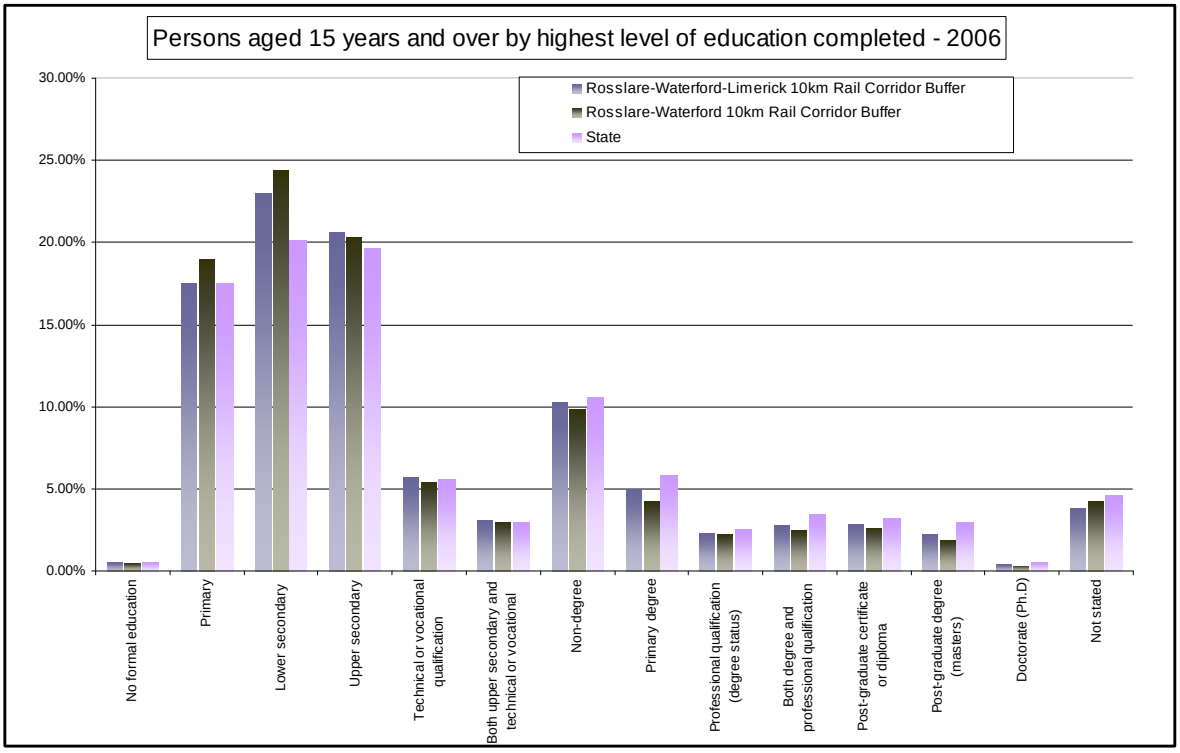
Graph 2.2 Population (within 10km Catchment Buffer of Rosslare-Waterford-Limerick Rail Line, Rosslare-Waterford Rail Line and State) by Socio-Economic Group of Reference Person – 2006

2.3.4 Persons Aged 15 years and Over by Highest Level of Education Completed

The Rosslare-Waterford segment of the rail corridor (a 10km buffer) has a good standard of education in comparison with the overall Rosslare-Waterford-Limerick rail corridor and the national average. For example, 2.25% of persons aged 15 years and over have a professional qualification (degree equivalent) within this segment of the corridor, while 2.27% and 2.56% respectively have professional qualifications (degree equivalent) within the overall Rosslare-Waterford-Limerick corridor and the national average. Table 2.6 and Graph 2.3 provide a full breakdown for the Rosslare-Waterford-Limerick rail corridor, the Rosslare-Waterford rail corridor segment and the State.

	Total	No formal education	Primary	Lower secondary	Upper secondary	Technical or vocational qualification	Both upper secondary and technical or vocational	Non-degree	Primary degree	Professional qualification (degree status)	Both degree and professional qualification	Post-graduate certificate or diploma	Post-graduate degree (masters)	Doctorate (Ph.D)	Not stated
Rosslare-Waterford-Limerick 10km Rail Corridor Buffer	100.00%	0.51%	17.47%	23.01%	20.67%	5.66%	3.04%	10.29%	4.99%	2.27%	2.76%	2.84%	2.22%	0.41%	3.85%
Rosslare-Waterford 10km Rail Corridor Buffer	100.00%	0.48%	18.93%	24.38%	20.32%	5.35%	2.97%	9.79%	4.19%	2.25%	2.46%	2.58%	1.81%	0.29%	4.21%
State	100.00%	0.57%	17.47%	20.12%	19.64%	5.59%	2.96%	10.57%	5.84%	2.56%	3.45%	3.19%	2.97%	0.51%	4.57%

Table 2.6 Persons Ages 15 Years and Over (within 10km Catchment Buffer of Rosslare-Waterford-Limerick Rail Line, Rosslare-Waterford Rail Line and State) by Highest Level of Education Completed - 2006



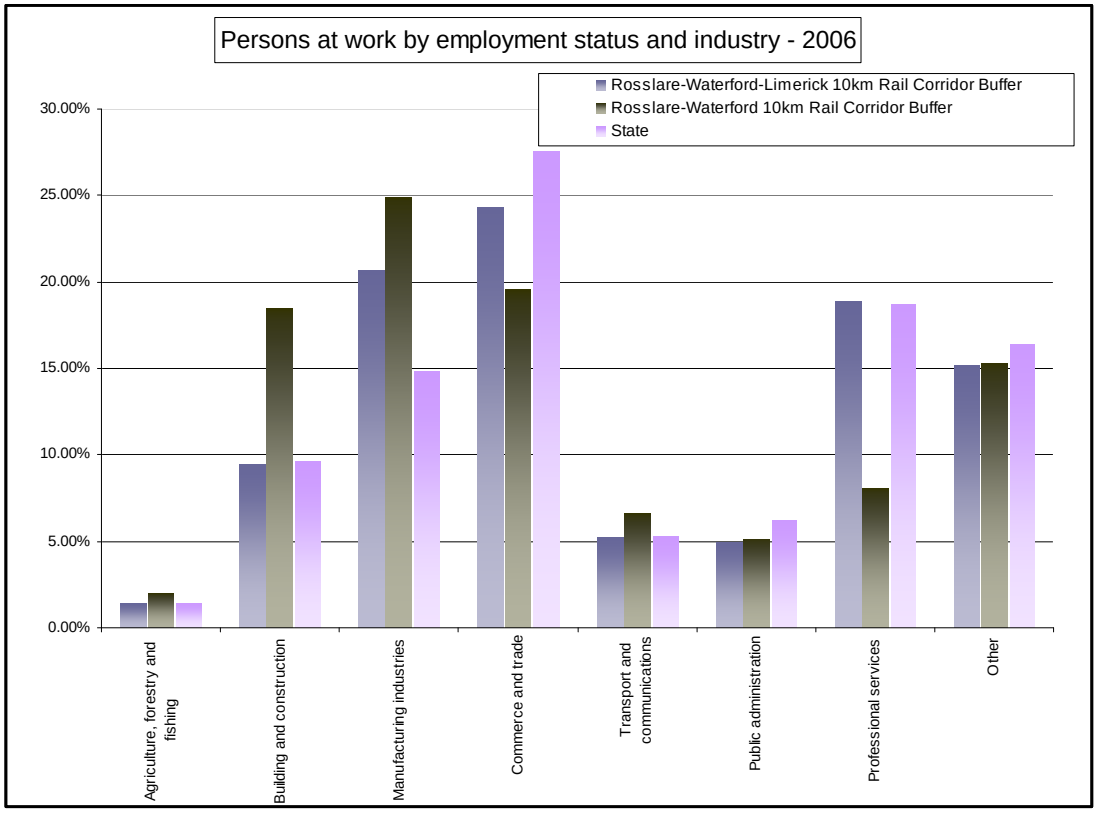
Graph 2.3 Persons Ages 15 Years and Over (within 10km Catchment Buffer of Rosslare-Waterford-Limerick Rail Line, Rosslare-Waterford Rail Line and State) by Highest Level of Education Completed - 2006

2.3.5 Persons at Work by Employment Status and Industry

The largest percentage of persons within the Rosslare-Waterford segment of the rail corridor work within the manufacturing and commerce/trade sectors, at 24.83% and 19.59% respectively. The overall Rosslare-Waterford-Limerick rail corridor encompasses percentages of 20.65% and 24.34% respectively for the manufacturing and commerce/trade sectors, while the national average for these sectors equates to 14.81% and 27.52%. Details relating to the Rosslare-Waterford-Limerick rail corridor, the Rosslare-Waterford rail corridor segment and the State are set out in Table 2.7 and Graph 2.4.

	Total	Agriculture, forestry and fishing	Building and construction	Manufacturing industries	Commerce and trade	Transport and communications	Public administration	Professional services	Other
Rosslare-Waterford-Limerick 10km Rail Corridor Buffer	100.00%	1.44%	9.45%	20.65%	24.34%	5.19%	4.94%	18.85%	15.14%
Rosslare-Waterford 10km Rail Corridor Buffer	100.00%	1.94%	18.51%	24.83%	19.59%	6.67%	5.12%	8.06%	15.28%
State	100.00%	1.39%	9.64%	14.81%	27.52%	5.28%	6.21%	18.71%	16.44%

Table 2.7 Persons (within 10km Catchment Buffer of Rosslare-Waterford-Limerick Rail Line, Rosslare-Waterford Rail Line and State) at Work by Employment Status and Industry - 2006



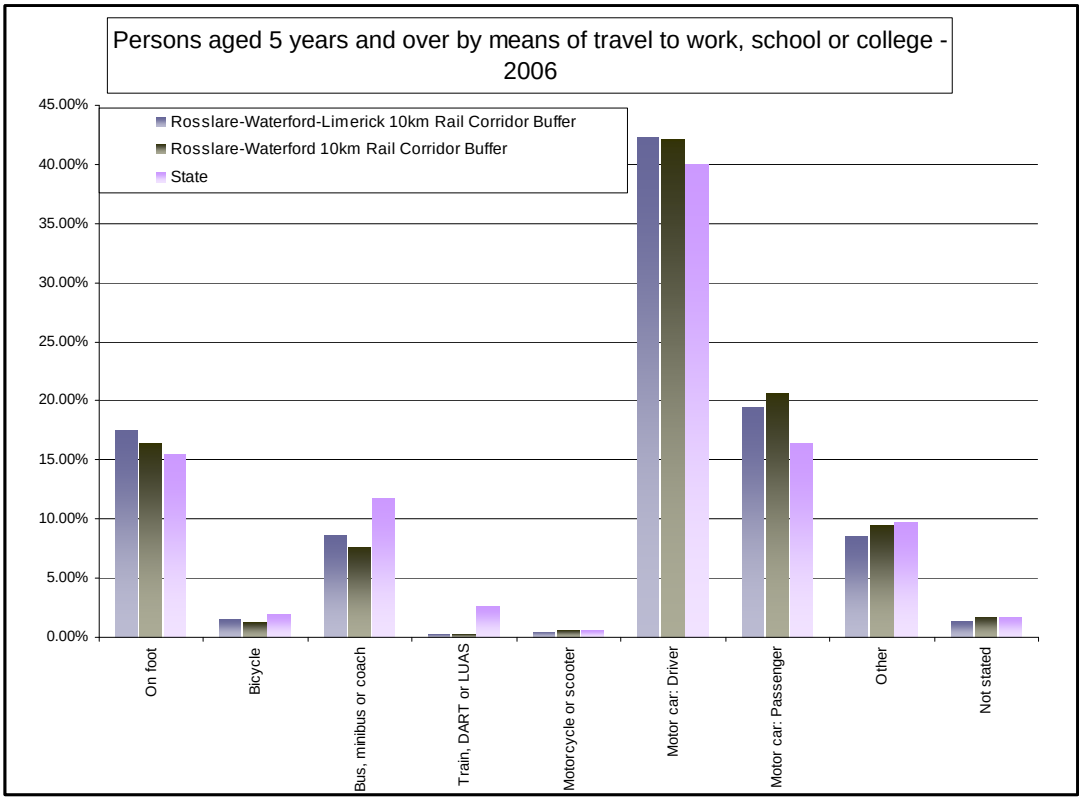
Graph 2.4 Persons (within 10km Catchment Buffer of Rosslare-Waterford-Limerick Rail Line, Rosslare-Waterford Rail Line and State) at Work by Employment Status and Industry - 2006

2.3.6 Persons Aged 5 Years and Over by Means of Travel to Work, School or College

It is interesting to note, in the context of this Study, the percentage of the relevant population that travel to work, school or college by each mode of transport. For example, 0.21% of the Rosslare-Waterford rail corridor travel by train, compared with 0.18% of the population along the overall Rosslare-Waterford-Limerick rail corridor, and a national average of 2.56%. With regard to motor vehicle usage within the Rosslare-Waterford segment of the overall rail corridor, 42.19% drive and 20.63% travel as a passenger by this means. This is comparable with percentages of 42.21% and 19.47% respectively along the overall Rosslare-Waterford-Limerick rail corridor. The State average in this respect is calculated as 40.02% and 16.44%. Table 2.8 and Graph 2.5 illustrate the specific details for the Rosslare-Waterford-Limerick rail corridor, the Rosslare-Waterford rail corridor segment and the State.

	Total	On foot	Bicycle	Bus, minibus or coach	Train, DART or LUAS	Motorcycle or scooter	Motor car: Driver	Motor car: Passenger	Other	Not stated
Rosslare-Waterford-Limerick 10km Rail Corridor Buffer	100.00%	17.56%	1.51%	8.68%	0.18%	0.49%	42.21%	19.47%	8.50%	1.38%
Rosslare-Waterford 10km Rail Corridor Buffer	100.00%	16.36%	1.23%	7.67%	0.21%	0.60%	42.19%	20.63%	9.41%	1.71%
State	100.00%	15.50%	1.93%	11.70%	2.56%	0.51%	40.02%	16.44%	9.66%	1.67%

Table 2.8 Persons Aged 5 Years and Over (within 10km Catchment Buffer of Rosslare-Waterford-Limerick Rail Line, Rosslare-Waterford Rail Line and State) by Means of Travel to Work, School or College - 2006



Graph 2.5 Persons Aged 5 Years and Over (within 10km Catchment Buffer of Rosslare-Waterford-Limerick Rail Line, Rosslare-Waterford Rail Line and State) by Means of Travel to Work, School or College - 2006

2.4 Summary of Key Findings

The South-East region comprising of Carlow, Kilkenny, South Tipperary, Waterford and Wexford had a population of 460,838 persons in 2006. This represented a 17.71% increase in population over the ten year period from 1996-2006. The population for the South-East Region is projected to increase from 487,800 persons in 2008 to 596,500 persons in 2022 (using a high growth scenario as illustrated in table 2.3). This represents a 22.2% increase in population over this time period.

The Mid-West region comprising of Clare, Limerick and North Tipperary had a population of 361,028 persons in 2006 representing a 13.86% increase in population over the ten year period from 1996-2006. The population of the Mid-West region is projected to increase from 371,900 persons in 2008 to 475,000 in 2022 (high growth scenario) representing a 27.7% increase in population over the ten year period.

A five tier settlement strategy is proposed as part of this study that incorporates primary, secondary, moderate, local and settlement growth centres, with population designations being established for each. The essential realisation within the strategy is the importance of the Rosslare-Waterford-Limerick rail line in linking numerous settlement centres and also establishing a critical sustainable transportation link between the two national gateways of Waterford and Limerick and the national hub of Wexford.

A 20km buffer either side of the overall Rosslare-Waterford-Limerick rail line was established to represent the potential ‘catchment’ of those that could use or be impacted by the rail service along the rail line. There was a population of 464,210 persons recorded in 2006 within a 20km buffer along the corridor with a population of 316,130 persons recorded in 2006 within a 10km buffer along the corridor. A more focussed 20km and 10km buffer was also established for the Rosslare-Waterford section of the rail line. A population of 247,710 was recorded within a 20km buffer along this section of the corridor with a population of 117,920 within a 10km buffer.

Within the identified Rosslare-Waterford section of the rail line a total of 54.75% of the population were at work in 2006. This is comparable with a percentage of 54.36% in respect of the identified Rosslare-Waterford-Limerick 10km rail corridor buffer and the national average of 57.18% over the same period. 9.63% of the persons aged 15years and over with the Rosslare-Waterford segment are classified as student. Analysis of persons aged 5 years and over and their means of travel to work, school or college found that 0.21% of the population of the Rosslare-Waterford rail corridor travel by train, compared with 0.18% of the population along the overall Rosslare-Waterford-Limerick rail corridor and a national average of 2.56%.

SECTION THREE

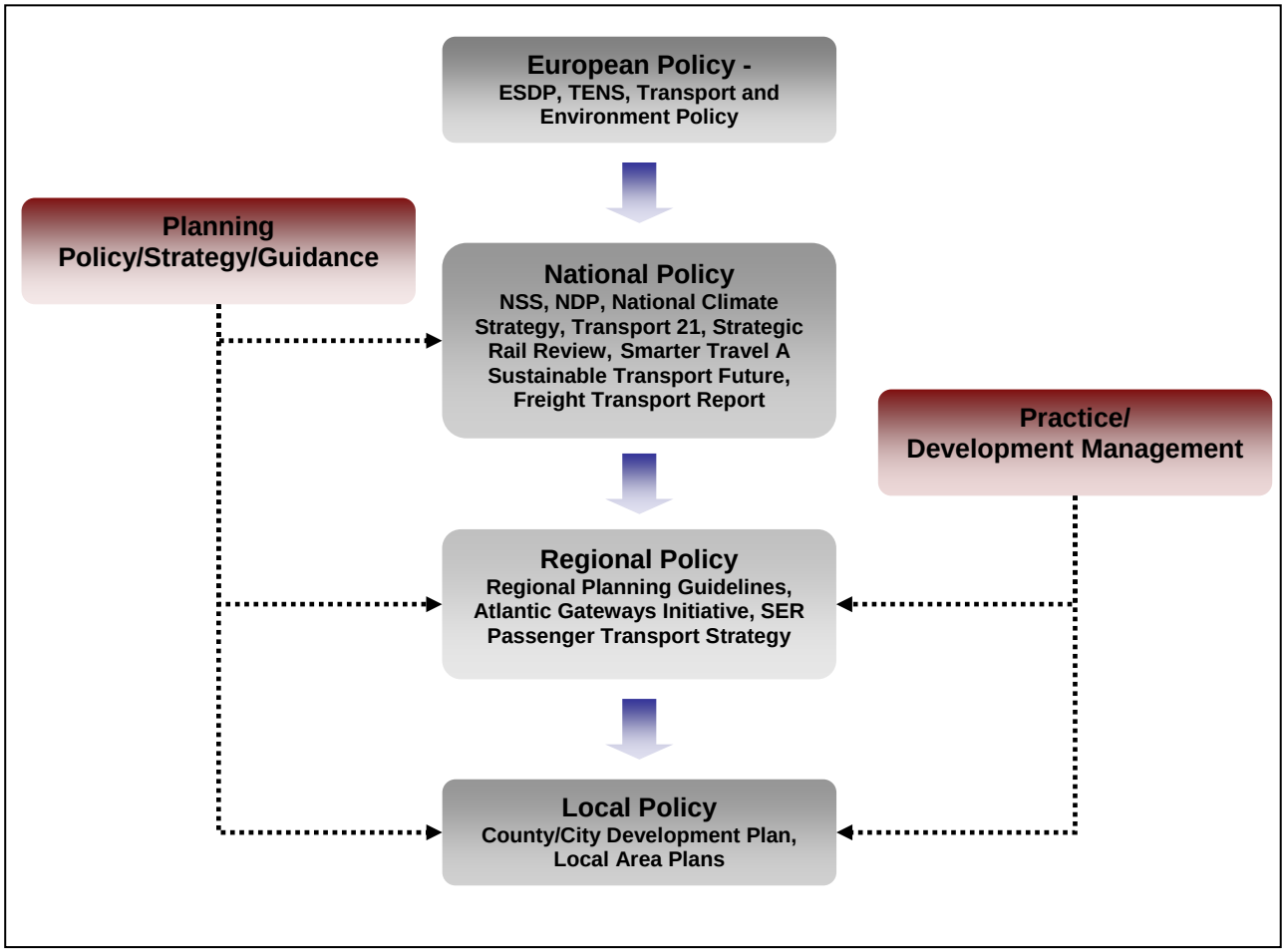
POLICY FRAMEWORK

3.0 POLICY FRAMEWORK

3.1. Overview

There are a range of planning policies and strategic plans which must be considered in order to establish a more detailed and rounded sense of the issues facing the South-East region and the direction in which the region is planned to develop into the future. Through the examination and assessment of the relevant documentation a definitive framework from which to develop, grow and promote the region's *'sustainable modes of transport'* can be established.

Policy considerations will inevitably filter down from the European and national levels to a regional and county/local level. A particular focus of this policy review will be on settlement strategies, sustainable modes of transport, climate change and the requirements to ensure success for the region as a whole. The European and national policy guidance provides a general and strategic framework for the region with the regional and county policy documents and strategic plans giving clear direction and focus areas for the region to achieve increased sustainable growth and development, particularly in terms of the achievement of greater economic potential, sustainable transport, climate change etc. Through the implementation of the relevant and appropriate elements of the strategies and plans set out below, the South-East region with the future development of the Rosslare-Waterford-Limerick rail line will significantly increase capacity development as a self-sufficient and economically viable region in accordance with the overreaching policy of the National Spatial Strategy.



3.2. European Policy Context

European Spatial Development Perspective

The main policy aims of the European Spatial Development Perspective (European Commission 1999) are directed primarily towards facilitating more polycentric and balanced regions, clusters and networks promoted through heightened cooperation and integrated policy frameworks. The fundamental objectives of community policy, namely economic and social cohesion, knowledge-based economic competitiveness, principles of sustainable development and conservation of important natural and cultural resources underlie the spatial development policy.

Spatial Objectives of the ESDP

The ESDP states that member countries have to implement the ***'promotion of integrated transport and communication concepts, which support the polycentric development of the EU territory'.*** The document also states that member countries have to **improve their accessibility by promoting the use of 'different types of transport which are not only effective but also environmentally friendly'** as this is seen to be of particular importance to the sustainable development of towns and cities. Transport and telecommunication opportunities are important factors in promoting polycentric development. Efficient transport and telecommunication systems and services have a key role in strengthening the economic attractiveness of the different metropolises and regional centres.

Trans-European Networks (TENs)

The EU Treaty obliges the Community to contribute to the organisation and development of Trans European Networks (TENs) in the areas of transport, telecommunications and energy supply infrastructure. **TENs focuses on a well functioning and sustainable transport system**. The concepts for the development of the networks were laid down in European Community guidelines. There is a risk that investments in secondary networks and their integration into the TENs cannot be carried out in time, or cannot be carried out at all, if the completion of higher ranking networks is given greater priority. To avoid a relative deterioration of service quality in those EU areas which are not directly integrated into the Trans-European Networks, the extension of secondary networks should not be treated as less important. This also includes the modernisation of regional transport services.

Figure 3.1: Priority Projects of the Trans European Transport Network (source: European Spatial Development Perspective, 1999).

In doing this, the utilised means of transport should be adapted to the specific local and regional circumstances (conventional rail network, buses, regional airports, etc.). **The more efficient use of existing infrastructure can be achieved by strengthening environmentally friendly transport systems and promoting intermodal transport chains**. It is an objective of the EU that in order for TENs to be implemented that 'the authorities responsible for ports, airports, rail transport and trunk roads and the operators of the different networks should co-ordinate their policies and activities through integrated intermodal strategies'.

Trans European Networks-Transport (TEN-T)

TEN-T envisages coordinated improvements to primary roads, railways, inland waterways, airports, seaports, inland ports and traffic management systems, so as to provide integrated and intermodal long-distance high-speed routes for the movement of people and freight throughout Europe. It is becoming increasingly clear that increases in traffic can no longer be managed by expansion of road infrastructure alone. Spatial development policy and urban development measures have a role to play in influencing the behaviour of local business and the population in order to improve the possibilities for a shift from road traffic to the environmentally friendly transport modes, local public transport, cycling and walking. A multitude of different initiatives are also required in long-distance traffic, in particular by increasing the shift to rail, inland waterways and coastal and maritime transport. The TEN-T Guidelines issued by the EU state that ***'the conventional rail network shall comprise of lines for the conventional transport by rail of passengers and freight, including the rail segments of the trans-European combined transport network referred to in Article 15, access links to sea and inland ports of common interest and those freight terminals which are open to all operators'.***

The rail network shall include the infrastructures and the facilities which enable rail and road and, where appropriate, maritime services and air transport services to be integrated. In this regard, particular attention shall be paid to the connection of regional airports to the network.

White Paper 2001– 'European Transport Policy for 2010: Time to Decide'

The European Commission has proposed 60 or so measures to develop a transport system capable of shifting the balance between modes of transport, **revitalising the railways**, promoting transport by sea and inland waterway and controlling the growth in air transport. In this way, the White Paper fits in with the sustainable development strategy adopted by the European Council in Gothenburg in June 2001.

It is an objective of the White Paper to ***'revitalise the railways by creating an integrated, efficient, competitive and safe railway area and to set up a network dedicated to freight services.'*** Rail transport is literally the strategic sector, on which the success of the efforts to shift the balance will depend, particularly in the case of goods.

Environment 2010 – Our Future, Our Choice (6th EU Environment Action Programme)

The overall direction of EU environment policy is laid out in the latest action program--"Environment 2010: Our Future, Our Choice." It concentrates on 4 priority areas: climate change; nature and biodiversity; environment and health; and natural resources and waste. Also, an Environment and Health Action Plan for 2004-2010 promotes a close relationship between health, environment and research policy.

The Sixth Environment Action Programme focuses on areas where more action is needed and new European initiatives will make a difference. It sets out objectives for the next 10 years and beyond. The key to the long-term welfare, in Europe and around the world, is 'sustainable development': finding ways of improving our quality of life without causing harm to the environment, future generations or the people of both the rich and developing world.

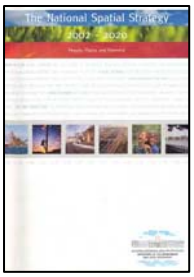
There are four areas where new effort and impetus are needed. The Commission proposes to take strong action with regards to:

- **Tackle climate change**
- **Protect nature and wildlife**
- **Address environment and health issues**
- **Preserve natural resources and manage waste**

Environment 2010: Our Future, Our Choice is not only about protecting the environment for now and the future; it is also about improving the quality of life for all its citizens.

3.3. National Policy Context

National Spatial Strategy (NSS) 2002 – 2020

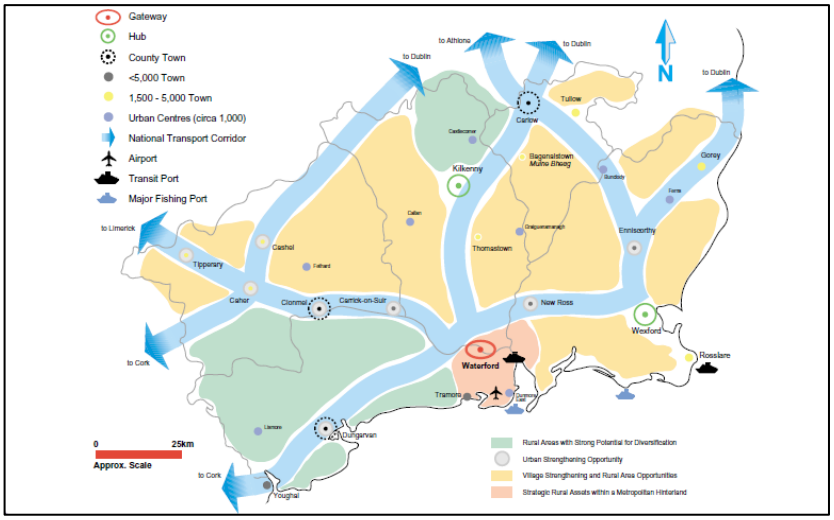


The National Spatial Strategy (NSS) is a twenty-year planning framework designed to deliver more balanced social, economic and physical development between regions in Ireland. It provides a national framework and policy guidance for the implementation of regional, county and city plans. In order to focus development in the eight identified regions in Ireland the NSS proposes that areas of sufficient scale and critical mass will be built up through a network of 'gateways', 'hubs' and 'development centres'. It identifies Dublin as the engine of the national economy but also seeks to strengthen the drawing power of other areas. The central premise is the bringing of people, jobs and services closer together, thus ensuring a better quality of life. The NSS is the pre-eminent policy public policy that provides the overall planning framework within which all current and future planning policies are set.

The NSS proposes that areas of sufficient scale and critical mass will be built up through a network of gateways. Figure 3.2 illustrates the spatial strategy in the context of the South-East and Mid-West regions as applicable to the Rosslare-Waterford-Limerick rail corridor. The national spatial framework is important to the region because it enables policies for the future development of this region to be formulated and set. Key to the successful implementation of the NSS in the South-East Region is the enhancement of Waterford as a Gateway, supported by Wexford and Kilkenny as Hubs. **These three together will form a nationally strategic 'growth triangle'.** A critical mass of population will help support greater economic activity and quality of life. In turn the development of Wexford Town as a hub will energise smaller towns and rural areas within its influence.

The NSS states that the characteristics, location, concentration and distribution of future economic activity will have a crucial bearing on the achievement of a more balanced spatial development. The growth of a Waterford/Wexford/Kilkenny triangle of strength needs to be supported by a co-ordinated and integrated approach that builds on their complementary strengths.

The NSS recognises that the existing gateways of Cork, Galway, Limerick and Waterford are strategically located in different parts of the country, with considerable potential for further development and expansion.



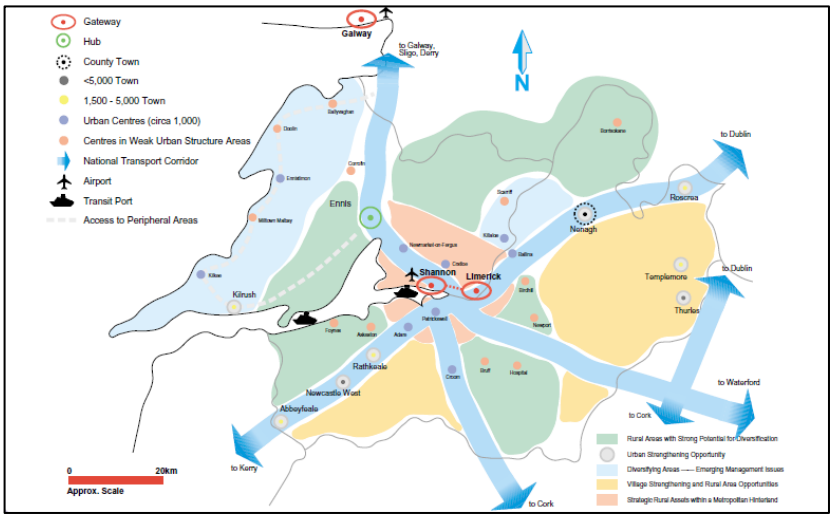


Figure 3.2 South-East and Mid-West Regions as set out in the National Spatial Strategy

The NSS suggested future possibilities for combining the complementary strengths of the cities and expanding such interaction to achieve a critical mass strong enough to balance the type of critical mass that has been achieved by Dublin. The NSS proposes that '***the national spatial structure be supported by a national transport framework, providing an improved network of roads and public transport services, enhancing access and connections throughout the country'.*** This framework will be internationally connected through key points such as airports and ports with links to Northern Ireland, the UK, EU and the broader global economy. The spatial considerations for planning other key areas of infrastructure such as energy and communications are also covered.

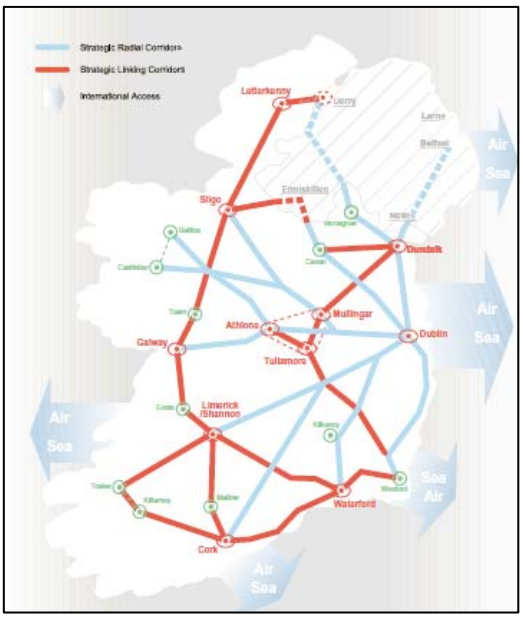


Figure 3.3 National Transport Framework as illustrated in the National Spatial Strategy

The NSS states that **'to support balanced regional development, Ireland's transport networks must build on Ireland's radial transport system of main roads and rail lines** connecting Dublin to other regions, by developing an improved mesh or network of roads and public transport services ensure, through building up the capacity and effectiveness of Ireland's public transport networks, that increases in energy demand and emissions of CO2 arising from the demand for movement are minimized'. It is an objective of the NSS to 'allow internal transport networks to enhance international access to all parts of the country, by facilitating effective interchange possibilities between the national transport network and international airports and sea ports'. In relation to the delivery of the public transport network it will be important to ensure that rail continues to offer realistic alternatives to road travel on the key inter-city routes—Dublin-Belfast and Dublin-Cork/Galway/Limerick/Waterford and that services to other gateways and hubs should be enhanced.

The NSS makes reference to the transport of goods in stating ***that 'a new approach to freight transport and goods distribution based on planning that takes into account the way in which the various links, such as road, rail and ports in the goods supply chain are interdependent'*** should be adopted.

National Spatial Strategy Development Issues and Challenges 2007

The National Spatial Strategy (NSS) identified a network of cities and larger urban areas and designated them as Gateways whose development was to be promoted as part of the government's overall framework for achieving more balanced regional development. Nine medium to large towns or pairs of towns were identified in the NSS as Hubs to ensure that the positive effects of the Gateways in the regions would be extended to areas between the Gateways, and provide a link to the rural parts of the region.

The area of **transport connectivity was seen as a key issue** with 'road and rail connections between Hubs and Gateways and between Hubs and their wider rural areas are seen as particularly important issues which need to be adequately addressed, particularly through the national and non-national road networks'.

All Gateways and Hubs are very concerned about promoting economic development and creating the type of local economic conditions that will enable the Hubs to act as a key driver for regional and local development, both within the Hub towns themselves and in the wider rural areas of which they are a part. Waterford,

Kilkenny and Wexford can drive regional growth by providing a large and skilled population base, substantial capacity for additional residential and employment related functions and an improving transport network.

National Development Plan (NDP) 2007-2013

The National Development Plan (NDP) 2007-2013 termed 'Transforming Ireland - A Better Quality of Life for All' sets out the roadmap to Ireland's future. The NDP integrates strategic development frameworks for regional development, rural communities, all-island co-operation, and protection of the environment with common economic and social goals. While the NDP 2000-20006 was about expanding the economy and employment (and the provision of the physical and social mechanisms necessary to support such goals), the current NDP places a greater emphasis on the implementation of the National Spatial Strategy and balanced regional development. It seeks to address extent and envisaged challenges facing the country by improving the infrastructure needed to support the planned growth of the urban environment and its surrounding hinterland.

The NDP has an objective to harness the potential for future growth and development provided by the expansion of the population. As such, the NDP 2007-2013 integrates social objectives within economic, social and environment concerns. The high level objectives of the NDP 2007-2013 are:

- Maintenance of a framework of macroeconomic and budgetary stability;
- Addressing economic and social infrastructure deficits;
- Supporting enterprise, innovation and productivity;
- Promotion of social inclusion;
- Balanced regional development;
- All-island economic and sectoral co-operation;
- Environmental sustainability and;
- Value for money on delivery of programmes.

It is an objective of the NDP to 'integrate regional development within the National Spatial Strategy framework of Gateway cities and Hub towns to achieve the goals of economic growth in the regions and provide for major investment in the rural economy'. The Plan sets out a strong framework for the **promotion of regional development** with a particular focus on investment in the National Spatial Strategy (NSS) Gateway centres. An overriding strategic policy of the plan is the linking and extending of the capabilities and performance of the Gateways to more outlying and rural areas by supporting the development of key towns at strategic locations along the transport corridors between the Gateways.

The NDP sets out measures such as promoting the switch from car to public transport, especially in major urban centres, which will have a substantial impact on environmental sustainability over the longer term and on our potential to meet international commitments relating to climate change**. Rail investment priorities include the renewal of national and local rail services.**

Strategic Rail Review, 2003

A Strategic Rail Review (SRR) prepared by Booz Allen Hamilton with Ernst and Young (Government Publications, 2002) on behalf of the Department of Transport, found that the national railway system has inherited a legacy of significant operational limitations and constraints. Historical under-investment has meant that the railway's ability to respond to need and to deliver quality services has been severely limited.

Some parts of the network are served at extremely low levels in terms of passenger volumes. This results in levels of services that are both unattractive to potential users and inefficient to operate. Significantly, the SRR highlighted the non-radial routes, such as those linking the Atlantic Gateways, as particularly weak in this regard. The SRR examined the rail lines in operation in the country and made priority investment recommendations.

The Limerick Junction to Rosslare Harbour line is classified as a lightly served line in the report. It is stated that the potential passenger volumes are such that even by adopting an enhanced service with new technologies which would cut operational labour costs; it is questionable whether additional investments

should take place, particularly where competing investments of higher societal returns are available. Investment using new generation rail technology would represent a very significant enhancement to existing rail service in terms of service quality, train frequency and journey time reductions. A detailed feasibility analysis would be required to determine the ultimate position of this proposal (p163 Section 6.8).

The SRR also examined the rail network in terms of the recommendation of the National Spatial Strategy (NSS), which clearly indicates that better interconnection between Galway and Cork, via Limerick, would facilitate ease of interaction and enhancement of critical mass. It was stated that enhanced connections between Waterford and Limerick would enhance critical mass in the regions; however, this line performs poorly taking into account the scale of investment required and likely patronage levels. It is stated that '***the main challenge in advancing lightly serviced lines such as the Limerick Junction to Rosslare line exist at regional and local levels'.*** (p 247 Section 10.2). It is recommended that further feasibility and technical assessments should be carried out to advance the Limerick Junction to Rosslare Harbour Scheme.

It is, however acknowledged that ***'the quality/customer focus of the timetabling and performance on this line is certainly questionable'*** (p167, Section 6.9.2). Passenger services on the lightly served lines – Limerick to Rosslare and Limerick to Ballybrophy – operate at significant operating deficits. Cessation of all services on these lines (passenger and freight) is marginal as the results of an economic evaluation were inconclusive in terms of whether a net gain or loss would accrue to the community from doing so. However, any investment in these lines would have the potential to 'crowd out' more justifiable investments elsewhere in the network.

It is concluded that subject to the comments made with respect to the NSS, it is recommended that additional investment in the lightly served line of Limerick Junction to Rosslare Harbour should not be undertaken at the expense of the priority investment recommendations and that the economic evaluation undertaken as part of the strategic rail review does not support investment in this rail line(Executive Summary p14).

Rail Freight

The report stated that the freight business is at a watershed: volumes are in decline, the customer base is highly concentrated, the financial deficit is mounting, competitive market pressures are on the increase and the majority of assets involved are aged. The likely solutions will come from a mix of selective pruning, selective (and transparent) Government support and increased involvement of the private sector.

At present Iarnród Éireann operates a multi-modal freight service using rail cars and Lorries (Roadliner network distribution). Rail freight services are as follows: Bulk freight, Intermodal/Unit load, Keg distribution, Express parcels and freight forwarding. The report also discusses the wider-socio economic benefits of rail freight when compared to road freight, it is stated that: ***'rail has the potential to produce less air pollution per tonne-km and be more fuel-efficient than road traffic'***. The disappearance of rail freight would have a detrimental effect on the future environment and would make it harder for Ireland to meet its Kyoto commitments in the future.

A study carried out by the European Commission[1] calculated the external costs of the different transport modes. Factors that influenced the costs were accidents, noise, air pollution, climate change, nature and landscape, urban effects and the upstream process. Congestion costs were not taken into account. Table 3.1 shows the costs per tonne kilometre for each of the modes:

Mode	External Cost (€/1000tkm)
Road freight	88
Rail Freight	19
Aviation	205
Waterborne	17

Table 3.1 Cost per Tonne Kilometre for Transport Modes

[1] Source: European Commission, White Paper, 'European transport policy for 2010: Time to decide', 2001

There are no direct support schemes for rail freight in Ireland similar to those operating in many European countries which explicitly aim to recognise rail's social benefits in the haulage task. It is stated that clearly, without a significant change in circumstances that Iarnród Éireann's freight business will continue to incur annual operating costs.

Transport 21 (2006-2015)

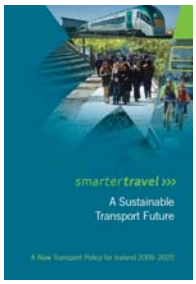
Published in November 2005 by the then Government, Transport 21 sets out a 10 year transport investment framework to 2015 covering both Exchequer and Public Private Partnership (PPP) capital investments in national roads and public transport. Transport 21 seeks to address the twin challenges of past investment backlogs and continuing growth in transport demand.

Transport 21 is made up of two investment programmes – a national programme and a programme for the Greater Dublin area. The main objectives of the national programme are –

- **to create a high quality, efficient national road and rail network consistent with the objectives of the National Spatial Strategy;**
- to provide for a significant increase in public transport use in provincial cities;
- to strengthen national, regional and local public transport services.

Transport 21 is informed by the National Spatial Strategy, the Regional Planning Guidelines and a number of other regional land use and transportation strategies for major urban areas and their hinterlands including – the Dublin Transportation Office's long term strategy, A Platform for Change; the Cork Area Strategic Plan; the Limerick Planning Land Use and Transportation Study; the Galway Transportation and Planning Study and the Waterford Planning Land Use and Transportation Study. Transport 21 provides capital funding only for major infrastructural projects. It is however complementary to other Government initiatives such as the Rural Transport Programme and the Sustainable Travel and Transport Plan.

Smarter Travel: A Sustainable Transport Future – A New Transport Policy for Ireland 2009-2020



Smarter Travel: A New Transport Policy for Ireland 2009-2020 is the government's overarching strategy for transport to the year 2020. Transport and travel trends in Ireland are unsustainable, as outlined in Chapter 1 of this Policy Document in terms of the relationship between land use and transportation planning. Smarter Travel emphasises the importance of full integration and alignment of transport plans with the development plan process. To ensure that a reduction in travel demand and reliance on the car can be achieved, there must be appropriate, reliable and user-friendly alternatives in place.

The document states that ***'existing transport agencies have an important role to play in delivering the targets in the Policy'***. A key objective outlined in the policy document is 'actions aimed at ensuring that alternatives to the car are more widely available, mainly through a radically improved public transport service and through investment in cycling and walking'.

A strong message that the public demands better availability and quality of public transport services, whether provided by State or private companies, both in urban and rural areas, came from the consultation process. The policy document sets out the government's overarching vision which includes a number of targets:

- There will be a considerable shift to public transport and other sustainable forms of travel;
- Ease of access to public transport and other sustainable forms of travel will be improved for all citizens, irrespective of location and mobility needs;
- The transport system will enhance Ireland's economic competitiveness;
- A reduction in greenhouse gas emissions and increased efficiency in the transport sector will contribute to Ireland's international commitments regarding climate change;
- Land use planning and the provision of transport infrastructure and services will be better integrated and;
- Individual and collective quality of life will be enhanced.

A key goal which forms the basis of the policy is ***to 'improve quality of life and accessibility to transport for all and, in particular, for people with reduced mobility and those who may experience isolation due to lack of transport'***. It is an objective of the policy document that the Department of Transport will work closely with local authorities to ensure better integration between sustainable land use and transport planning.

Freight Transport Report for the Island of Ireland, 2008

The purpose of this study is to provide policy makers and industry stakeholders with an increased understanding of the role of the freight industry and therefore influence policies that act to increase the competitiveness of the industries on the island of Ireland, enabling them to compete more effectively in an ever more competitive World market. In particular, it sets out the key issues for freight movements in both jurisdictions over the next 10 – 15 years.

Ports are the nodal points through which the island of Ireland connects with the global economy. In relation to ports there are 2 issues: capacity and connectivity. For ports to function effectively they must link seamlessly to the inland network.

The findings and recommendations of this report are designed to enable government and the freight industry to take action to develop freight transport within the island of Ireland with a consequent contribution to economic growth and industrial development.

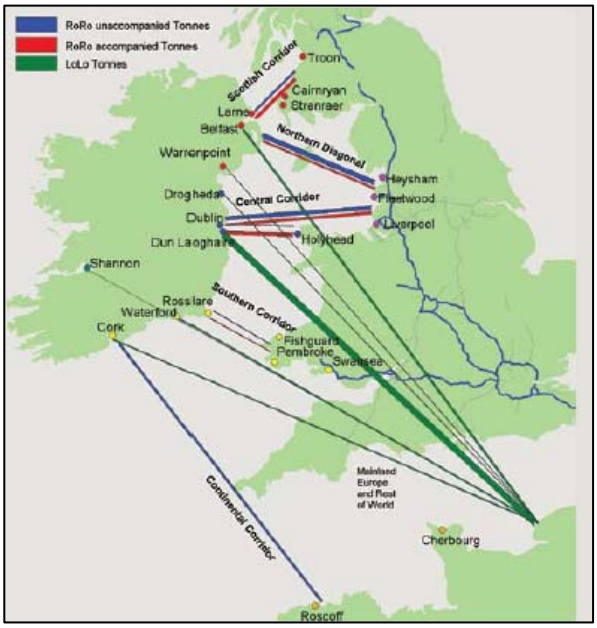


Figure 3.4 Ro-Ro Accompanied / unaccompanied and Lo-Lo freight tonnes shipped to the island of Ireland - Source: Maritime Statistics 2005 (DfT) and Statistics of

National Climate Change Strategy 2007-2012

This National Climate Change Strategy 2007-2012 follows on from the first national strategy, published in 2000 and reviewed in 2002, and takes account of the public consultation process which followed the further review in Ireland's Pathway to Kyoto Compliance (2006).

The purpose of this Strategy is twofold:

- to show clearly the measures by which Ireland will meet its 2008-2012 commitment; and
- to show how these measures position us for the post-2012 period, and to identify the areas in which further measures are being researched and developed to enable us meet our eventual 2020 commitment.

The European Union has committed itself to reducing its greenhouse gas emissions to 20% below 1990 levels by 2020. It has also committed to a reduction to 30% below 1990 levels if there is a global agreement

on comparable reductions elsewhere. A principal measure of the strategy is for a 'modal shift to public transport as a result of Transport 21 investment'.

Ireland is meeting its commitment through a variety of domestic measures to reduce emissions throughout the economy. The provision of infrastructure through the continued implementation of Transport 21, a €34.3 billion capital investment framework for the transport system for 2006 to 2015, will result in a switch from private to public forms of transport. An integral part of planning for future public transport provision will require encouraging commuters to move from private car use to more sustainable modes of travel.

3.4. Regional Policy Context

South-East Regional Planning Guidelines 2004

The Regional Planning Guidelines, developed by the Regional Authority, represent a planning framework for the period 2004-2020 designed to achieve a better spatial balance of social, economic and physical development throughout the region. The Guidelines set out a vision for the future development of the region which is to be achieved in part by ***'progress towards an accessible region with efficient and fully integrated transport systems'***. The RPGs further develop the principle established in the NSS for the development of a nationally strategic **'growth triangle'** with the enhancement of Waterford as a Gateway supported by Wexford and Kilkenny as hubs.

The South-East Regional Planning Guidelines highlight how communications links between Waterford City and other gateways, including rail, road and telecommunications are seen as central to the overall objective of achieving balanced regional development. The level of development in the South-East that is being driven by Dublin and the effects on both the South-East towns and the Greater Dublin Area must be addressed. The Waterford-Dublin economic corridor has a significant role in developing linkages not only between the Greater Dublin Area and the South-East, but also between the Mid East Region and the South-East.

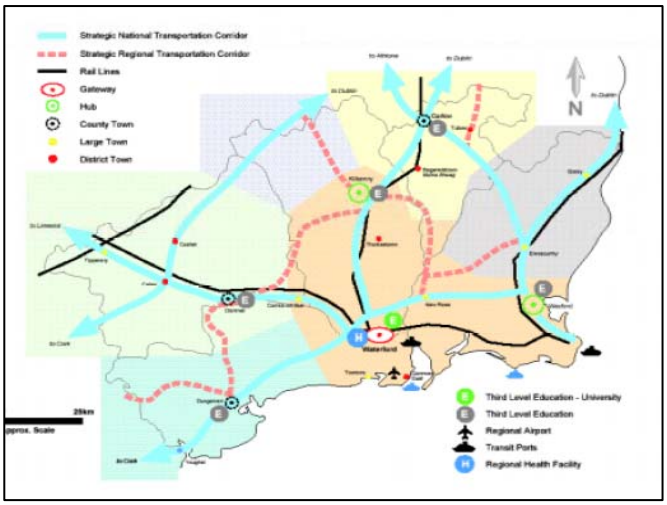


Figure 3.5 Development Strategy for the South-East Region as set out in the South-East Regional Planning Guidelines 2004.

The Guidelines set out the development strategy for the region. In setting out this strategy the Regional Authority recognise **the importance of accessibility** to the region and for the development of public transport networks. A key goal is 'to progress towards an accessible region with efficient and fully integrated transport systems'. This is to be achieved by a number of measures including:

- **'Improved transportation links between Rosslare Europort, Wexford and Dublin resulting from improvements to the N11 and improved rail services'.**
- **'Supporting the upgrading and rescheduling of services on the Rosslare to Limerick Rail Line (via Waterford). Its potential as a means of commuting to Waterford City and as an inter-regional link between the South-East and the Mid- West should be exploited'.**

The Waterford Planning, Land Use and Transportation Study (PLUTS) makes detailed recommendations for a population increase over double the present population by 2020. The Waterford PLUTS identifies the measures necessary for housing and other developments, both north and south of the River Suir. The PLUTS and RPGs also recommend the development of a University of the South-East as a key regional priority. A key element of the PLUTS is the achievement of critical mass to allow Waterford to reinforce and develop its role as the economic driver of the South-East. Achievement of the PLUTS recommendations will be a based on a partnership between Waterford City Council, Waterford County Council, Kilkenny County Council and other bodies.

Draft South-East Regional Planning Guidelines 2010-2022

The Draft South-East Regional Planning Guidelines were placed on public display in February 2010. The Draft Regional Planning Guidelines sit within an overall national policy context of the National Spatial Strategy and the most recent population targets. It is the role of the RPGs to set out a framework for the co-ordination of constituent local authority development plans and the proper planning and sustainable development of the region.

The Draft Guidelines identify a settlement strategy for the region based on the existing pattern of Gateway, Hubs, County Towns and other settlements and rural settlement objectives. This Settlement Strategy is underpinned by Transport and Housing policy. The Guidelines set out a vision which it to be achieved through a number of objectives including the ***'progress towards an accessible region with efficient and fully integrated transport systems'.*** The population targets set out in these Guidelines provide for the South-East Region to grow to a population of 580,500 persons by the year 2022. Good spatial planning at regional and local levels is essential to implement the National Spatial Strategy by ensuring that population growth occurs in a manner that is consistent with the spatial framework in the National Spatial Strategy and particularly aimed at enhancing the critical mass in the Gateways, Hubs and County Towns.

The Regional Strategy sets out a number of strategic goals and objectives which are aimed at ensuring that the South-East will remain competitive in the national and international marketplace and that the economic success will be shared more equally at regional level and throughout society. One of these goals is 'to support the development of the Gateway and combine the strengths of the cities and towns in the region, as envisaged in the National Spatial Strategy, to achieve sufficient critical mass to compete with larger urban centres in other regions by:

- Planning and providing for a regional population of 580,500 by the year 2022;
- Supporting the development and growth of the Waterford City Gateway as the driver for the region;
- Planning and providing for population growth in each of the two hubs of Wexford and Kilkenny and the county towns of Carlow, Clonmel and Dungarvan;
- Developing the main urban settlements as attractive places for people to live in and want to move to, where efficient public transport and quality public services and a high quality environment make them attractive places to live, to work in and do business in. This is the key to building critical mass and achieving population targets.

Another of these goals as set out in the strategy is 'to progress towards an accessible region with efficient and fully integrated transport systems by:

- **Improving public transport and connectivity throughout the region by providing more flexible public transport services and reducing commuting times and distances**;
- Making settlements sustainable through **the integration of land use and transport planning** and creating meaningful jobs locally and facilitating e-working;
- Enhancing access routes (road and rail) to the region's ports, recognising the important contribution of Rosslare Europort, Waterford Port and New Ross Port to the economic infrastructure of the region;
- Supporting the sustainable development of effective communications by road and rail between Waterford City and Dublin, Cork and Limerick, including upgrading the Rosslare – Limerick line;
- Improving transportation links between Rosslare Europort, Wexford and Dublin resulting from improvements to the N11/M11 and improved rail services;
- Establishing a spatial policy framework through which development of the ports in the region can be co-ordinated to deliver a critical mass of services and facilities, boosting the national and international competitiveness of the region;
- Promoting an increased frequency of rail services on the Waterford to Dublin line and a reduction in journey times between all centres of population along the line and **supporting the upgrading and rescheduling of services on the Rosslare to Limerick Rail Line (via Waterford) to provide for high quality and frequent commuter services with onward connections to Limerick and the Western Rail Corridor.**

The infrastructure along the Rosslare Europort-Waterford-Limerick rail line and services all need significant improvement to realise the potential of this line as an inter-regional commuter and inter-urban route.The Regional Authority will support the sustainable development of a Rail and Land-Use Plan for the Rosslare – Limerick Railway line. The following is a list of priority rail improvements required throughout the South-East Region:

- **RP5** Infrastructural investment along the Rosslare Europort-Waterford- Limerick Junction line including; signalling, track improvements and realignment to provide for increased frequency of services and reduced journey times - Medium Term
- **RP7** Development of the full potential of Limerick Junction as a key strategic asset linking the South-East to the Western Rail Corridor - Medium-term.

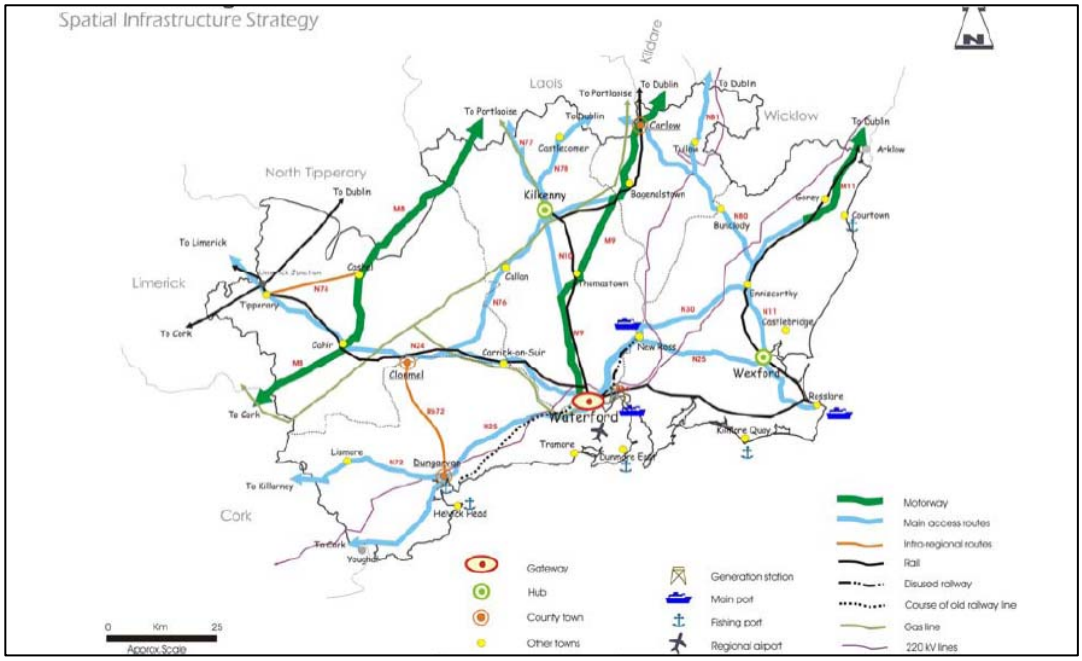


Figure 3.6 Spatial Infrastructure Strategy as set out in the Regional Planning Guidelines

National Transport Authority Submission to the Draft Regional Planning Guidelines for the South-East Region 2010-2022

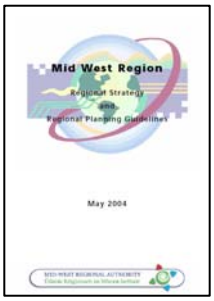
The National Transport Authority (NTA) places a critical emphasis on 'the need for a coherent approach to be taken in the prioritisation of investment in transport infrastructure in relation to the RPGs transport policies and objectives, as well as other policy areas such as settlement and economic development' in its submission to the Draft Regional Planning Guidelines for the South-East Region. The NTA goes on to state that ***'it is critical that the objectives of Smarter Travel are reflected in the RPG transport infrastructure investment proposals, the scale and location of new development and in the number of towns identified for growth in the finalised RPG settlement strategy and economic development strategy'***.

The NTA welcomes the focus the Draft RPGs place on improvements to rail infrastructure for passenger and freight services. The NTA also recommend that the Draft RPGs ***'support provision for rail freight in the construction of new stations/upgrading of existing stations and the installation of freight handling equipment at key rail stations'***. The submission goes on to state that 'the feasibility and operational basis for rail freight operations needs to be at least broadly identified at this stage'. It also needs to be clearly related to other policy areas such as economic development, ports policy, inter modality with the regional road network and access to international Gateways in other regions.

The NTA submission makes reference to the settlement strategy and the sees the Waterford Gateway as the economic driver for the region. Associated with this, **the consolidation of future development into existing urban areas at densities which support public transport services would therefore be regarded by the NTA as being critical in meeting national transport objectives**. The submission also states that 'it is not indicated in the Draft RPGs where population growth would be distributed, outside of the

Gateway, Hub towns and County towns. The NTA would recommend that these be specified to ensure that the lower order urban centres are supported through local growth consolidation'.

Mid-West Regional Planning Guidelines 2004



This document sets out the regional development strategy and regional planning guidelines for the Mid-West Region of Clare, Limerick City and County and North Tipperary, within the framework of the government's National Spatial Strategy and other national, regional and local strategies. A main objective of the strategy is ***to 'create an integrated public transport network that links the major settlements of the region with each other and that links the region with the rest of the country and beyond (rail bus, seaport, Shannon International Airport); achieve modal shifts to public transport'.*** The future growth of the region will be absolutely dependent on how well the region can engage with national and international players, whether through e-trade, air transport, shipping or domestic surface transport.

A specific goal of the strategy is that *'the economic development of the region would be promoted through the development of the social, economic and physical infrastructure demanded by foreign and indigenous industry and that, in particular, the education and research resources of the region would be integrated with the needs of industry'*. The land-use and transportation strategic approach that is adopted in these guidelines is as follows –

- To ensure the continued development of the centres of population in the central urban agglomeration;
- To identify a service centre for development in each of the peripheral development zones, that will act as enterprise, employment and social focal points within their areas;
- To provide high quality transport infrastructure between the Gateway/ Hub area and other Gateways, hubs and the peripheral zone service centres;
- **To provide high-quality public transport services between the various settlements of the region and other regions.**

Draft Mid-West Regional Planning Guidelines 2010-2022

The Draft Guidelines set clear objectives and targets to guide the development plans of the planning authorities that are specific in relation to future population, settlement strategy and development distribution, and infrastructure investment priorities in line with the NDP. The NSS emphasises that the contribution to balanced regional development of the Mid-West will require the enhancement of the performance of the Limerick/Ennis/Shannon area at the national/international level. There is a need to lever additional investment for the overall region, through its critical mass, strategic location, capacity for innovation and development, and connections within the national transport

The region has strong road links with the other regions and has existing and developing rail links with the other regions as well. The role of Limerick/Shannon, in particular, is of pivotal importance lying, as it does, at the intersection of the Cork Galway and Waterford Galway Corridors. The location of Shannon Airport at this intersection is also of great importance.

Atlantic Gateway Initiative – Achieving Critical Mass, 2006

The NSS particularly notes that the rapid growth of the main cities and surrounding regions of Cork, Galway, Limerick and Waterford points to their possible role in driving the development of their hinterlands and their combined potential to provide a strong counterbalance to Dublin capable of acting at the national and international levels, both individually and collectively. The NSS emphasises that a process of strengthening the critical mass of the existing gateways of Cork, Limerick, Galway and Waterford both individually and collectively, to complement Dublin's successful national spatial role, offers the most immediate prospects of establishing more balanced patterns of development over the next few years.

This feasibility study explores how the message of the NSS can be implemented in reality and confirms that the four reasonably proximate regional cities of Cork, Galway, Limerick and Waterford, situated on the western and southern coasts of Ireland, present the most immediate prospects for Ireland to develop the type of critical mass present in the Dublin region, to complement it and lead the drive towards more balanced regional development across the western and southern parts of the island of Ireland, complementing the dynamic east coast corridor between Dublin and Belfast.

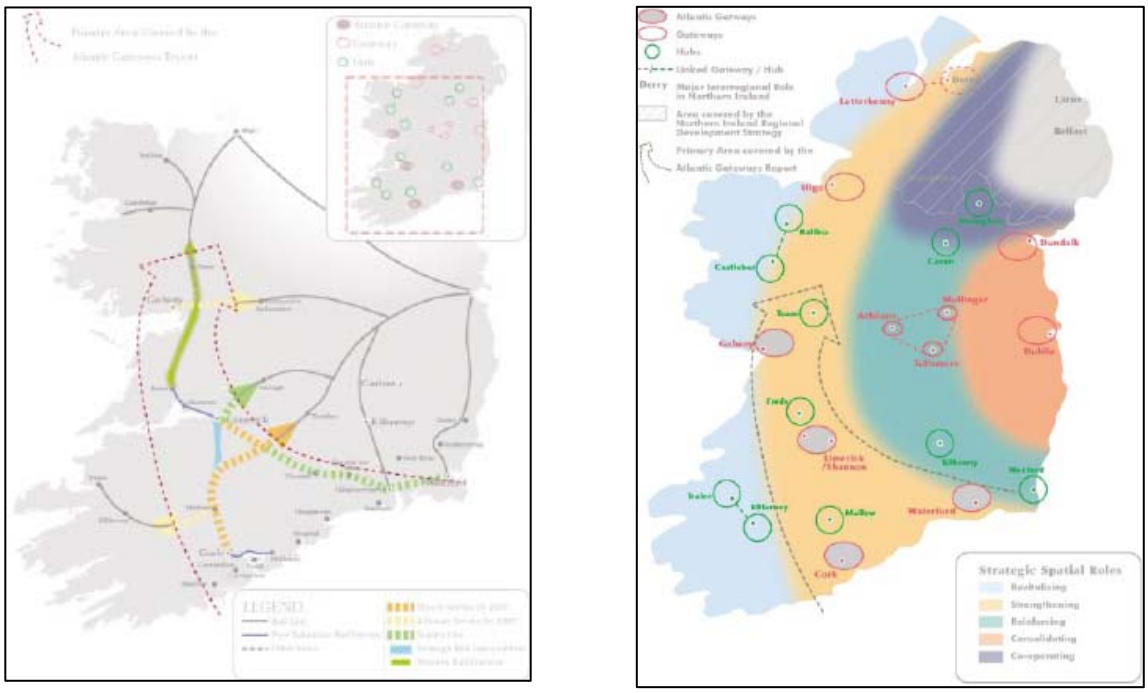


Figure 3.7 Atlantic Gateways approach as illustrated in the Atlantic Gateways Initiative

Connectivity is one of a number of key concepts in the initiative. The links that underpin connectivity are many, including physical, economic, financial, administrative, social or political factors. In practice the links would embrace transport routes, information linkages, formal and informal business alliances, informal or formal governance arrangements, connections between people and sporting links. The links may occur across a variety of dimensions. They may be transient or relatively permanent, involve more or fewer people or businesses, be nested within frameworks of other links, be formalised or informal.

All participants were agreed that, as the Atlantic Gateway concept is fundamentally about **better linkages between the gateways, a new approach to planning for and delivering world class infrastructure links between the gateways is critica**l. Access is central, connecting the gateways to each other will be vital in enabling the market to function effectively, attracting foreign direct investment, sustaining a burgeoning domestic enterprise sector and enabling people and enterprises establish their own links and networks. Through better linkages between the gateways and intervening towns and rural areas there must also be a strong social dimension to the Atlantic Gateways: cross-fertilisation between third level educational institutions, access to services and amenities in both urban and rural areas for people, and a strong cultural and entertainment dimension.

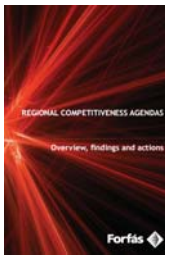
Atlantic Gateways Strategic Development Corridor Framework, 2009

This publication is a joint collaboration of the South-East, South-West, West and Mid-West Regional Authorities and Local Authorities and represents another key element of the process of implementing the Atlantic Gateways Report, namely the preparation of non-statutory strategic development frameworks for the four corridor areas between the Atlantic Gateways.

This document includes the outcome of collaborative work between the planning authorities and regional authorities within the four Gateway corridors. Integrating existing local authority plans and proposals into an

overall regional and local authority perspective on the corridors, the preparation of this document represents a further important step towards the absorption of Atlantic Gateways thinking into local planning policies.

Regional Competiveness Agendas – Overview, Findings and Actions

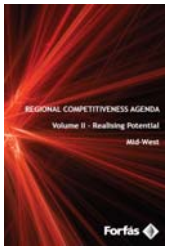


This study assesses how each region could build on its own potential, and continue to develop a competitive environment to support and stimulate enterprise development. The overarching objectives of the study were to:

- Highlight, from an enterprise perspective, how each region can continue to develop its competitive environment, build from its strengths and national and international networks, and address barriers to development;
- Provide the economic context to inform the update of the Regional Planning Guidelines (RPGs); and to
- Influence the refresh of the NSS being undertaken by Department of Environment, Heritage and Local Government and planned for completion early 2010 (DoEHLG).

The study found that 'a more coordinated and efficient approach to the delivery of national infrastructures' is needed and that 'accelerated development of the gateways, in a coordinated, strategic way that enhances their role as key drivers of economic development, and optimises the interaction with hubs and their immediate hinterlands' will help promote development of the regions.

Regional Competiveness Agenda – Volume II - Realising Potential - South-East



The objective of the South-East Regional Competiveness Agenda is to provide an economic overview to inform the updates of the Regional Planning Guidelines and specifically to:

- Highlight opportunities to build on each region's distinctive strengths;
- Identify barriers to achieving objectives and/or issues specific to the region together with actions to address them and to;
- Identify infrastructure priorities relevant to future enterprise needs within the region.

In relation to transportation and specifically rail transport the study found that ***'key enhancements are required in the increased level of service on the Limerick-Waterford rail route and the development of freight services in the region, serving port facilities at Waterford and Rosslare'.*** A priority action arising from the study is **'to achieve optimum utilisation and advantage of the regional rail infrastructure (especially the under-utilised Waterford–Limerick service) a focused review of timetabling and service provision on all routes is required and the necessary improvements made'.**

Regional Competiveness Agenda - Volume II - Realising Potential - Mid-West

The objectives of the Mid-West Regional Competiveness Agenda are the same as those outlined for the South-East region. Transport and broadband infrastructure are highlighted as critical factors in improving competiveness for the reason. The study finds that 'major infrastructure elements remain to be addressed which are fundamental to the region's development and to the realisation of the Atlantic Corridor concept and building critical mass'.

<u>Western Rail Corridor Strategy Document, the West on Track Campaign</u>

In line with the recommendations of Transport 21, this project involves the phased re-opening of sections of the Western Rail Corridor from Ennis to Athenry and onwards to Claremorris and the upgrade, for commuter services, of the Athenry to Galway line. This project when all three phases are completed will provide for a rail link between the cities of Limerick and Galway with an onward connection to Claremorris on the Dublin - Westport line. This new line will also facilitate the provision of inter-regional services within the BMW Region.

The line will be reinstated on a phased basis. Phase 1 will see the reinstatement of the line from Ennis to Athenry (officially opened in March 2010), including Galway to Athenry commuter services. Phase 2 will link Athenry to Tuam and phase 3 will see the reopening of the line from Tuam to Claremorris. The line from Claremorris to Collooney is to be preserved.

Figure 3.8 Map of Western Rail Corridor (source: Transport 21)

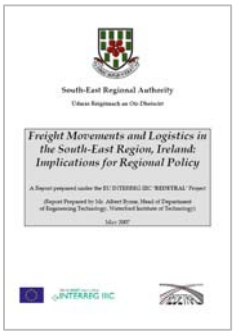
South-East Regional Passenger Transport Strategy, 2002 – 2012

This strategy was prepared by Fitzpatrick Associates, in conjunction with Steer Davies Gleave, on behalf of the South-East Regional Authority. The Strategy sets out broad directions, principles and proposals for using passenger transport in the Region. The purpose of the Strategy was to ensure that the South-East is In line to maximise the benefits and opportunities of an evolving national public transport policy and to make best use of transport to meet the Region's broad socio-economic needs.

The strategy sets out Strategic Transport Objectives and Key Requirements. **High quality transport will be a key enabler in achieving the socio-economic vision for the South-East and in meeting the challenges and opportunities faced by the Region**. Better transport cannot deliver the vision on its own, but neither can the vision be achieved without better transport. Transport objectives should therefore reflect broader socio-economic objectives, promote sustainable economic growth by using transport to capitalise on the South-East's Strategic location; contribute to improved social well-being and by making transport more widely available to those who need it, especially those identified as being socially excluded.

The key rail objective will therefore be to provide fast, reliable, comfortable and sustainable transport links that genuinely encourage modal shift on certain journeys. These will include: better links in the short-term on the mainline routes to Dublin, including the provision of direct or limited-stop services, improvements to timetabling and scheduling and substantially reduced journey times; immediate upgrading of the Rosslare-Limerick route to continuous welded rail (CWR), increased frequencies in the short-term and a significant improvement in the quality of the service.

Freight Movements and Logistics in the South-East Region, Ireland: Implications for Regional Policy 2007



'REDETRAL' is a European Union INTERREG IIIC co-funded project involving partner organisations from six EU member states, which examined the role of sustainable traffic and transport solutions and the development of logistics parks in regional development. Waterford Institute of Technology was commissioned by the South-East Regional Authority to carry out research to determine the benefits that could accrue to the region if more freight was transported by rail using multi-modal hubs (distribution centres) within and from the region. The subsequent report directly identifies how the South-East region has the potential to be at the forefront in terms of the development of an integrated freight transport system, integrating rail, port and road infrastructure.

The report recognises that the development of the ports in the region and their role in stimulating investment will have to be addressed within the political arena. The report outlines the opportunity which the South-East region should exploit:

> "*The development of a freight logistics system on a multi-modal basis, which would respond to the problems in regulations, infrastructure, management and other operations, could be*

developed in the South-East region. A number of key components necessary for such a system already exist"

The application of intermodal transport logistics developed on mainland Europe to the Irish transport model is discussed, particularly their application to the South-East region. The report ultimately recommends pursuing the development of an intermodal hub network for the South-East region, centred at the Port of Waterford, and optimising the assets of the region such as the presence of the three ports (two of which are connected to rail lines that link to all regions in Ireland) and significant opportunities for industrial development around these ports.

The report concludes stating "*It is time for the region to push forward from within and to develop and enhance its economic status and not wait for government intervention*"; the socio-economic and business case contained in the report seeks to facilitate this need through a regional community partnership approach.

3.5. Local Policy Context

Wexford County Development Plan 2007-2013

The settlement strategy set out in the County Development Plan identifies indicative population projections and a settlement hierarchy primarily based on the principles of the National Spatial Strategy. The fundamental component of the plan is to encourage population growth to locate in existing towns and villages that have the necessary social, community and physical infrastructure. This settlement strategy aims to deliver a range of house types, facilities, infrastructure, amenities and an efficient transport system. This in turn will facilitate linkages between settlements, and support their expansion and consolidation, and in so doing, will help create high quality living environments.

The settlement strategy is divided into a number of hierarchical layers that have been chosen to reinforce the policy objectives of the National Spatial Strategy. They are primary growth areas, secondary growth areas, strategic growth areas, district growth areas and local growth areas. Included in the strategic growth areas are those towns and settlements with good quality transport links. Future development in these settlements will utilise and underpin the existing road and rail network.

The settlement strategy as set out in the Development Plan aims to underpin the policy as set out in the RPGs for the promotion of settlement patterns that will utilise the Rosslare Euoport-Waterford-Limerick rail public transport node. In addition to good transport links these settlements also provide good infrastructural facilities and services combined with a good population base to maintain them.

The plan sets out its overarching transportation objective which is ***'the development of an efficient strategic transport system facilitating the movement of people, goods and services is essential to the future economic and social development of Wexford'***. A number of transportation policies and objectives of relevance are set out in the Development Plan including:

Objective T1 - To promote the development of public transport, cycling and walking as an alterative to private car traffic by facilitating and promoting the development of the necessary infrastructure.

Objective T14 - To seek the ongoing upgrading of the Rosslare – Waterford rail service for passengers and freight.

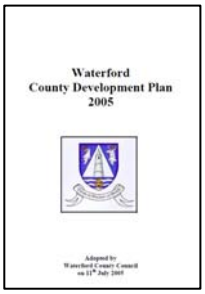
Objective T15 - To support Iarnród Éireann's policy of protecting and where possible, expanding existing rail corridors by restricting development on existing train routes.

Objective T16 - The Council will seek to promote the development of rail lines and commuter services including the development of the New Ross Waterford and Wexford/Waterford Commuter services.

Policy TP11 - The Council shall promote the growth and development of settlements on existing public transport routes.

It is an objective of the Plan to upgrade the Rosslare Europort – Waterford rail route and the settlement strategy aims to underpin this policy by promoting settlement patterns that utilise this transport node.

Waterford County Development Plan 2005-2011



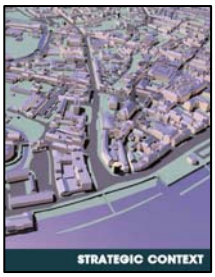
The Waterford County Development Plan sets out a settlement strategy that shall be developed so that no area in the county is peripheral or isolated, and such that the basic settlement unit will be fortified through local community involvement. The fundamental component of the County's Settlement Strategy will be to continue to encourage population growth in settlements throughout the county. The plan states that *'this strategy will help deliver a range of house types; facilities; infrastructure; amenities* ***and an efficient transport system'***. This in turn will facilitate linkages between settlements, and support their expansion and consolidation, and in so doing, will help create high quality living environments

The principle of sustainability dictates that Land Use and Infrastructure share a symbiotic relationship in a manner that reduces the cumulative impact of development on the environment with respect to visual amenity, air quality and water resources, minimises energy usage, and optimises the economic return from expensive infrastructure such as sanitary services and roads. The plan has a number of infrastructure policies and objectives of relevance including:

INF1: To assist in the provision of high quality infrastructure of a sustainable nature so as to support socio-economic development throughout the county and improve the quality of life for its citizens.

INF4: To support the provision of an integrated public transport system as a means of reducing social isolation and as a viable long-term sustainable transport option.

Waterford City Development Plan 2007-2013



The Development Plan sets out Waterford City Council's policies and objectives for the development of the City from 2007 to 2013. The plan seeks to develop and improve in a sustainable manner the social, economic, cultural and environmental assets of the city.

The Development Plan sets out that ***'the integration of land use planning and transport is particularly important and necessary for reasons of economic and social cohesion, energy and resource conservation and future sustainability'***. Designated land uses, by facilitating economic activity, will give rise to demands for travel and transport provision. Equally the provision of transport services will give rise to changes in land uses.

To achieve a balance of travel supply and demand in Waterford, development will be directed towards areas where improved transport service capacity can be provided. The most direct method of tackling congestion is by providing alternative transport choices to **encourage a modal shift to public transport** and non car modes and focusing local transport policy on developing improved public transport services and other sustainable modes.

High quality facilities and transport infrastructure are vital to link Waterford both nationally and internationally. In particular, maximising the potential of the airport and rail links as well as the main inter-urban road network will be critical to the economic future of Waterford.

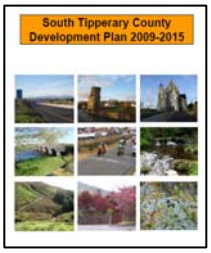
Waterford is served by rail links on two important national corridors – the Dublin to Waterford Corridor and the Limerick to Rosslare Harbour Corridor. The maximisation of the use of these strategic links is important from a national economic and sustainable development perspective. The NSS identifies Waterford as a key node in the development arc that stretches from Derry to Sligo to Limerick and Waterford. In particular, the Limerick to Rosslare line is a strategic link between Rosslare Port and the Port of Waterford and the western seaboard extending their effective hinterland as far as Sligo and Ballina. The route has a strategic role to play in a national sustainable freight transport strategy as well as providing a transport service to meet local, regional and tourist travel demands.

Waterford Planning and Land Use Transportation Study (PLUTS) 2001

Waterford City Council commissioned the Waterford Planning, Land Use and Transportation Strategy (PLUTS) in order to provide a strong planning framework for the development of the City and Environs over the period up to 2020. The PLUTS Strategy is consistent with the policy direction and requirements of the National Spatial Strategy. It supports and fosters balanced spatial development at a national, regional, city and local level. A key element of the Strategy is the achievement of critical mass to allow the City to reinforce

and develop its role as the economic driver of the South-East Region. The PLUTS sets out a strategy that aims to provide guidance as to the general scale and location of growth in Waterford so that the City and its environs can be developed in a balanced, sustainable, transport friendly and attractive way to provide a high quality of life and opportunities for all its citizens over the next 20 years.

South Tipperary County Development Plan 2009-2015



The County Development Plan provides the strategic framework and policy context for guiding development within the administrative area of South Tipperary County Council. The overall objective of the Settlement Strategy as set out in the Development Plan 'is to provide strong service centres at strategic locations throughout the county'. The County Settlement Strategy identifies a range of settlement types with a good spatial distribution throughout South Tipperary. These different settlement types are envisaged to perform differing roles but ultimately to ensure that no area in the county is peripheral or becomes isolated.

The strategy provides for the creation of a settlement hierarchy reflecting the development role of each settlement type. The purpose of the hierarchy is to ensure that future development is guided into existing settlements and contributes in a positive way to the built form and character of each settlement, with good service base, excellent communication network and interconnectivity between settlements.

South Tipperary is traversed by two active rail lines; Dublin-Cork and Limerick-Waterford. The Limerick to Waterford rail line traverses the county from west to east and provides the potential for a realistic alternative to private transport in the county. The Development Plan states that ***'it is important that the Limerick to Waterford rail line is developed to a standard comparable to the Dublin-Cork service*** *and upgraded to a standard that renders both lines to be seen as a viable alternative to road transport. In order to ensure long-term viability of these lines, it is equally important that land-use policy and future development takes advantage of rail as a potential transport option'*.

Policy INF 3 - Public Transport of the Development Plan states that 'the Council will support and promote the continued development of a sustainable and integrated public transport network in order to enhance general accessibility and social inclusion throughout the county. In this regard the Council will work with all transportation and development agencies to upgrade and improve public passenger and freight services serving South Tipperary County. The Council will also protect lands adjacent to rail stations and along rail routes against encroachment by uses that could compromise the long-term development of the rail facility.

Kilkenny County Development Plan 2008-2014

The Development Plan sets out Kilkenny County Council's policies and objectives for the proper planning and sustainable development of the County from 2008 to 2014. The primary objective of the settlement strategy as set out in the Development Plan is to encourage housing, industry and other land uses to locate on suitably zoned land in areas where the appropriate social, community and physical infrastructure either exists or is planned. The settlement structure of the county is classified into five categories; large growth areas, large town, district towns, smaller towns/villages and smaller settlements/nodes.

The Development Plan contains a number of transportation policies and objectives including:

- **IE1** Develop an integrated sustainable system of transport for the county involving road, rail, bus, cycling and walking.
- **IE2** To facilitate the development of alternative transport initiatives particularly in rural areas in order to reduce isolation and promote social inclusion.
- **IE15** Seek to implement the South-East Regional Passenger Transport Strategy 2002-2012
- **IE18** To promote and encourage the intensified use and further development of the Rosslare to Limerick rail link for freight and passenger traffic in the interests of promoting sustainable commuting patterns and assisting in the development of the Atlantic Gateways Initiative.

Limerick County Development Plan 2005-2011

The County Development Plan sets out a clear settlement structure based on size and function for the entire county and the functional relationships between them. The development of settlements will be promoted in a planned and sustainable manner. It is an overarching aim of the plan to 'ensure that the county's transportation, infrastructure, natural and energy resources shall be developed in a sustainable and efficient manner to promote the social and economic well being of the County and its population'.

A key aim of the plan is to ***'promote an integrated transport system throughout the County that is safe, efficient, competitive, accessible and socially and environmentally friendly with an increased emphasis on the use of alternative modes of transport including public transport, cycling and walking'***. The development of settlements will be promoted in a planned and sustainable manner. It is a policy of the Council to concentrate development in locations where it is possible to integrate employment, community services, retailing and public transport.

It is the policy of the Council to 'support and encourage sustainable forms of transport (public transport, walking and cycling) in the county in order to reduce car usage and support the principles of sustainability'.

Limerick City Development Plan 2004-2010

An overall goal of the Limerick City Development Plan is 'to develop an integrated transportation and land use strategy which provides sustainable and balanced development, with access to a wide range of transport modes and communication routes throughout the city'. Policy ED 2 of the plan - Promote Regional Planning Policies – states that 'it is the policy of Limerick City, to identify, promote and develop its Economic and Spatial Development policies within the framework of the Mid-West Regional Planning and Economic Guidelines, and to include such policies in the Development Plan'.

The Limerick City Development Plan sets out policies and objectives to develop and integrated transportation and land use strategy which provides for sustainable and balanced development. It is the policy of the City Council to adopt a comprehensive and coordinated Land Use and Transportation Plan for Limerick city, within the policy framework and remit of the NDP, NSS, PLUTS and approved Local Development Plans.

3.6. Summary

An overarching theme in all of the various policy documents from the European, National, Regional and Local levels is the growing importance of local and regional communities and their role in spatial development. All of the policy documents include objectives and policies for the sustainable development and the promotion of an integrated public transportation system as a key goal or objective for future strategic planning for the regions. The National Spatial Strategy sets out the spatial structure for the growth of the various regions in Ireland by directing future development into a number of Gateways and Hubs. These Gateways and Hubs which are located throughout the regions will provide the critical mass of population to allow for the future economic, social and physical development of the regions.

The South-East and Mid-West Regional Planning Guidelines sit within an overall national policy context of the National Spatial Strategy and the most recent population targets. It is the role of the RPGs to set out a framework for the co-ordination of constituent local authority development plans and the proper planning and sustainable development of the region. The Regional Planning Guidelines identify a settlement strategy for the region based on the existing pattern of Gateway, Hubs, County Towns and other settlements and rural settlement objectives. This Settlement Strategy is underpinned by Transport and Housing policy. The various County and City Development Plans in the South-East and Mid-West regions set out their settlement strategies based on the policies and objectives as set out in the Regional Planning Guidelines and the National Spatial Strategy.

The policy review contains a number of policies and objectives of particular relevance to this study, including:

- The ESDP states that member countries have to implement the *'**promotion of integrated transport** and communication concepts, which support the polycentric development of the EU territory*';
- Key to the successful implementation of the NSS in the South-East Region is the enhancement of Waterford City as a Gateway, supported by Wexford and Kilkenny as Hubs. **These three will form a nationally strategic 'growth triangle'.**

- The NSS proposes that the national spatial structure be supported by a national transport framework, providing an **improved network of roads and public transport services, enhancing access and connections throughout the country';**
- The NSS states that 'to support balanced regional development, Ireland's transport networks must build on Ireland's radial transport system of main roads and rail lines connecting Dublin to other regions, by developing an improved mesh or network of roads and public transport services; ensure through building up the capacity and effectiveness of Ireland's public transport networks, that increases in energy demand and emissions of CO2 arising from the demand for movement are minimized'.
- It is an objective of the NSS to ***'allow internal transport networks to enhance international access to all parts of the country, by facilitating effective interchange possibilities between the national transport network and international airports and sea ports';***
- An overriding strategic policy of the National Development Plan is the linking and extending of the capabilities and performance of the Gateways to more outlying and rural areas by **supporting the development of key towns at strategic locations along the transport corridors between the Gateways**;
- The Strategic Rail Review of 2003 stated that the main challenge in advancing lightly serviced lines such as the Limerick Junction to Rosslare line exist at regional and local levels;
- A key objective of Transport 21 is to create a high quality, efficient national road and rail network consistent with the objectives of the National Spatial Strategy;
- The Smarter Travel – A Sustainable Transport Future transport policy document states **that *'existing transport agencies have an important role to play in delivering the targets in the policy'.*** A key target of this policy document is that there will be a considerable shift to public transport and other sustainable forms of travel. A principal measure of the transport strategy is for a ***'modal shift to public transport as a result of Transport 21 investment'.***
- The population targets set out in the South-East Regional Planning Guidelines provide for the South-East Region to grow to a population of 580,500 persons by the year 2022. Good spatial planning at regional and local levels is essential to implement the National Spatial Strategy by ensuring that population growth occurs in a manner that is consistent with the spatial framework in the National Spatial Strategy and particularly aimed at enhancing the critical mass in the Gateways, Hubs and County Towns.
- A key goal of the South-East Regional Planning Guidelines is ***'to progress towards an accessible region with efficient and fully integrated transport systems'.*** This is to be achieved by a number of measures including: 'supporting the upgrading and rescheduling of services on the Rosslare to Limerick Rail Line (via Waterford). The RPGs point to the potential of the rail line as a means of commuting *'to Waterford City and as an inter-regional link between the South-East and the Mid-West should be exploited';*
- The South-East Regional Authority will support the sustainable development of a Rail and Land-Use Plan for the Rosslare-Limerick Railway line.
- An objective of the Mid-West Regional Planning Guidelines is to ***'to provide high-quality public transport services between the various settlements of the region and other regions'.***
- The concept as set out in the Atlantic Gateway Initiative is fundamentally about better linkages between the gateways, **a new approach to planning for and delivering world class infrastructure links between the gateways is critical.** Access is seen as central, connecting the gateways to each other will be vital in enabling the market to function effectively, attracting foreign direct investment, sustaining a burgeoning domestic enterprise sector and enabling people and enterprises establish their own links and networks;
- The settlement strategy's as set out in the County Development Plans for Wexford, Waterford, South Tipperary and Limerick all identify indicative population projections and a settlement hierarchy primarily based on the principles of the National Spatial Strategy. The fundamental component of the plans is to encourage population growth to locate in existing towns and villages that have the necessary social, community and physical infrastructure. This settlement strategy aims to deliver a range of house types, facilities, infrastructure, amenities and an efficient transport system.

SECTION FOUR

MAKING THE SOCIO-ECONOMIC AND BUSINESS CASE

4.0 MAKING THE SOCIO-ECONOMIC AND BUSINESS CASE

4.1. Introduction

Policy Context for Decision

Section 3 sets out the policy context for the decision on the future of passenger services on the Rosslare-Waterford line. It highlights the role of rail in addressing the central development policy objectives at EU, national, regional and local levels. A decision to terminate passenger services would directly conflict with the thrust of development policy, but on the other hand a poorly-performing service cannot make a material contribution to those policy aims.

It has been recognised, certainly since the 2003 Strategic Rail Review that the service on the Rosslare-Limerick Junction line has been performing poorly in terms of attracting passenger traffic. At present, it is contributing practically nothing to policy objectives and costing significant amounts of money to maintain. The 'do nothing' option is not a sensible option. It should either be closed or something must change to radically improve performance on the line. In the absence of a credible strategy for such a change, the logic behind the closure option, as highlighted in the 2009 'Report of the Special Group on Public Service Numbers and Expenditure Programmes', would be difficult to resist.

The challenge for the line is heightened by the current financial climate and reduced Exchequer resources. However, the imperative to reverse the country's loss of financial strength must be balanced by maintaining the positive characteristics of the economy that support the current ratings of the Government bonds[2]. Those characteristics are the country's demonstrated adjustment capability and economic vitality. These are precisely the objectives of the policy framework outlined in section 3.

The challenge is therefore to consider the potential value of the line, recognising that such value can only be realised through a substantial change in the levels of service on the line. As explained in section 5 below, we do not believe that Iarnród Éireann's business case coherently defines such a service or provides an evidence base for the outcome.

This section sets out our analysis which leads to a service definition and a quantified, evidence-based estimate of the outcome. We consider it to be substantially positive.

4.2. Basis for a Decision to Terminate

Legislative Basis

Section 19(2) of the Transport Act 1958 specifies the basis on which a decision to terminate a rail service can be made: *'The Board shall not terminate a service [of trains for passengers or merchandise] unless it is satisfied that its operation is uneconomic and that there is no prospect of its continued operation being economic within a reasonable period.'*

The Act does not define the term 'economic' so it would imply a conventional interpretation that takes into account all the social and economic costs and benefits that arise from providing train services.

The definitive policy framework set out in section 3 identifies the European, national regional and local strategic context for the decision and highlights that a decision to close would appear to be totally inconsistent with the thrust of the spatial and planning policy framework.

Given this broader national policy context, the decision to close must depend on an assessment that there is no prospect of the number of passengers using the service reaching levels that can be considered consistent with economic operation. The terms of reference for our work do not extend to us carrying out a detailed cost benefit analysis taking all socio economic factors into account. However, we consider that demonstrating a prospect of continuing operation achieving levels of passenger usage, on a per km or per service basis, that is in line with services considered economic elsewhere would be good evidence of a prospect of operation being economic within a reasonable period.

[2] For example, see Moody's press release 19 July 2010 announcing its downgrading of Ireland's Government bond ratings to Aa2 from Aa1.

Scope of the Decision

We have considered the nature of the potential market for rail services on the Rosslare-Waterford line in the context of the line's relationship with other parts of IE's network, and notably the Waterford-Limerick line with which services could be integrated. However, our primary focus is on the Rosslare-Waterford market as this is the scope of the decision to be made by the NTA. We consider our conclusions for that line would broadly extend to the Waterford-Limerick line.

Evidence-Based Decision

We expect that the NTA will have regard to the Government's broader policies on Better Regulation in reaching its decision on the application for closure of Rosslare-Waterford passenger rail services. In particular (and in accordance with paragraph 2.19 of the RIA Guidelines published by the Department of the Taoiseach in June 2009), we would expect the NTA, as a matter of best practice, to use an evidence-based impact assessment methodology such as a Regulatory Impact Assessment (RIA) to inform its decision. Paragraph 2.19 of the Revised RIA Guidelines explains:

'It is important that the regulations produced by [bodies with regulatory powers] have regard to the Government's broader policies on Better Regulation and that they are developed having regard to all relevant impacts. Therefore, while the Government decision in relation to RIA applies only to Government Departments and Offices, these other regulators should, as a matter of best practice, use RIA as a regulatory tool to assist in identifying the costs, benefits and impacts of their regulations since these can have significant impacts. While RIA is something which is frequently associated with economic regulatory decisions and as such is a tool already used by some independent regulators, e.g. ComReg who have published guidelines on their own approach to RIA, it should also be considered by officials working on other policy areas.'

As described in paragraph 3.5 of the Revised RIA Guidelines, the assessment '*should provide decision-makers with a solid factual evidence base about the costs, benefits and other impacts of a range of feasible policy options relating specifically to the identified issue or problem.'*

A critical part of an assessment is defining the alternative options. It is common sense, and best practice as indicated in the RIA Guidelines, that the range of options would need to be reasonably comprehensive to ensure that the decision is evidence-based – if a potentially valuable option is omitted from the analysis, the evidence-basis for the decision would be deficient.

The Economics of Rail Services

An important feature of rail services is that a substantial part of the costs involved are fixed. It appears from the evidence provided by IE that the bulk of the costs of running the rail line between Rosslare and Waterford is in maintaining the infrastructure and employing signalmen and gatekeepers. The cost of rolling stock and of employing drivers is a relatively small part. Once the cost base is structured to support rail services throughout the day, at an annual cost estimated by IE of around €2.3 million[3], the additional costs of providing additional services would be relatively small. Meanwhile, increasing frequency is the principal factor that makes rail services more attractive for passengers. It has been the experience of rail lines in Ireland, the UK and elsewhere that increasing service frequency can increase patronage very significantly[4].

We consider it is both appropriate and necessary to consider the option of increasing service frequency to levels that have been shown to generate sustainable passenger traffic for broadly similar lines in the UK.

We believe that it is also important to consider a reasonably frequent service to ensure that we can draw evidence-based conclusions from traffic levels on broadly similar lines in the UK. The current service frequency on the Rosslare-Waterford line, at one service daily each way, is insufficient to give us any reliable information on what passenger numbers might be were the frequency to be brought up to modern service standards. It is therefore necessary to look to experience on comparator lines to obtain an evidence-basis for the decision. In part, because of the relative richness of available information on UK lines, in part because of the diversity of rail lines in the UK from which we can identify comparators and in part because the Community Rail Partnership initiative in the UK has meant that a number of rural lines have benefitted from effective marketing in recent years, we have looked to the UK for that evidence.

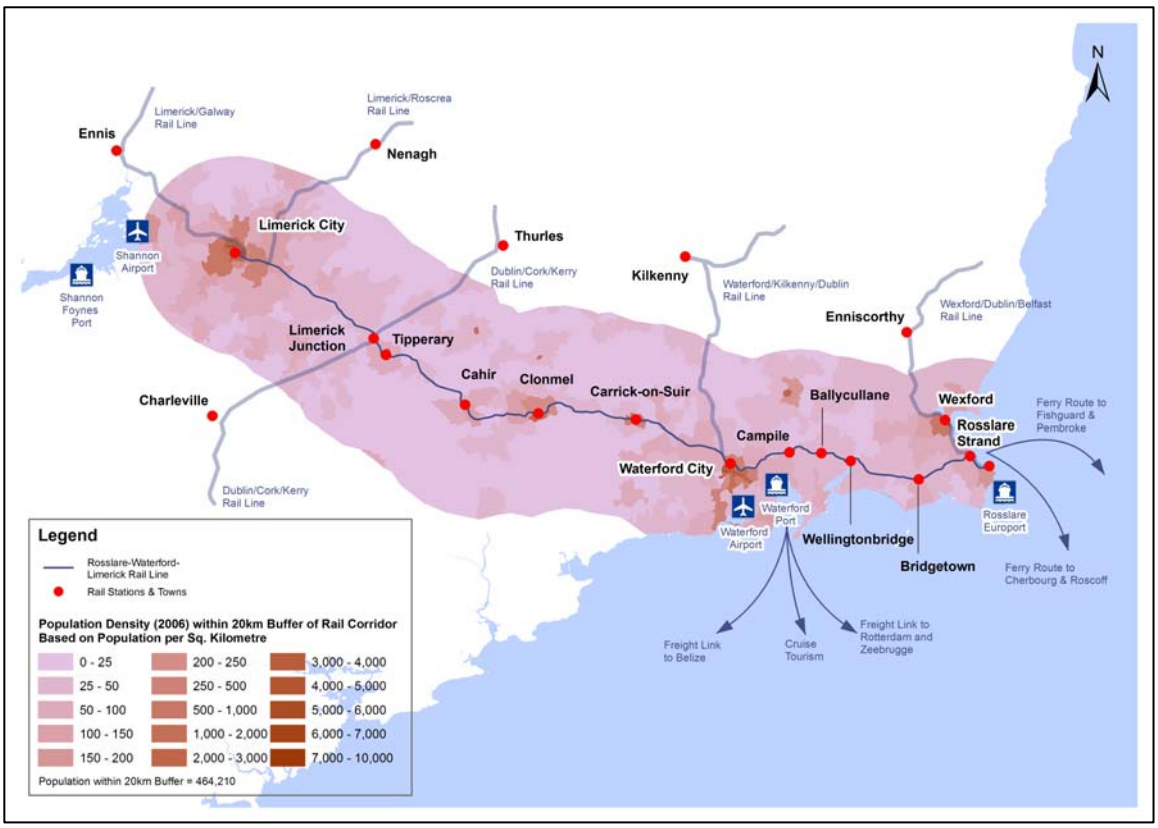
[3] Some of those costs, no doubt, would be reduced with some investment in automatic gates and signals.

[4] Informal indications from people the project team have spoken to are supported by a number of studies which show that the frequency elasticity of demand can be high. A frequency elasticity of 1.0 would mean that passenger numbers could be expected to double with a doubling of frequency. Figures in the region of 0.6 to 0.9 for established services appear to be typical (for example D E S Jones and P R White, 1994, 'Modelling cross-country rail services', Journal of Transport Geography). The level of demand on existing services is unlikely to be a sound basis for projections using frequency elasticities.

4.3. Identifying the Potential Market

Population Analysis for Wexford/Rosslare-Waterford

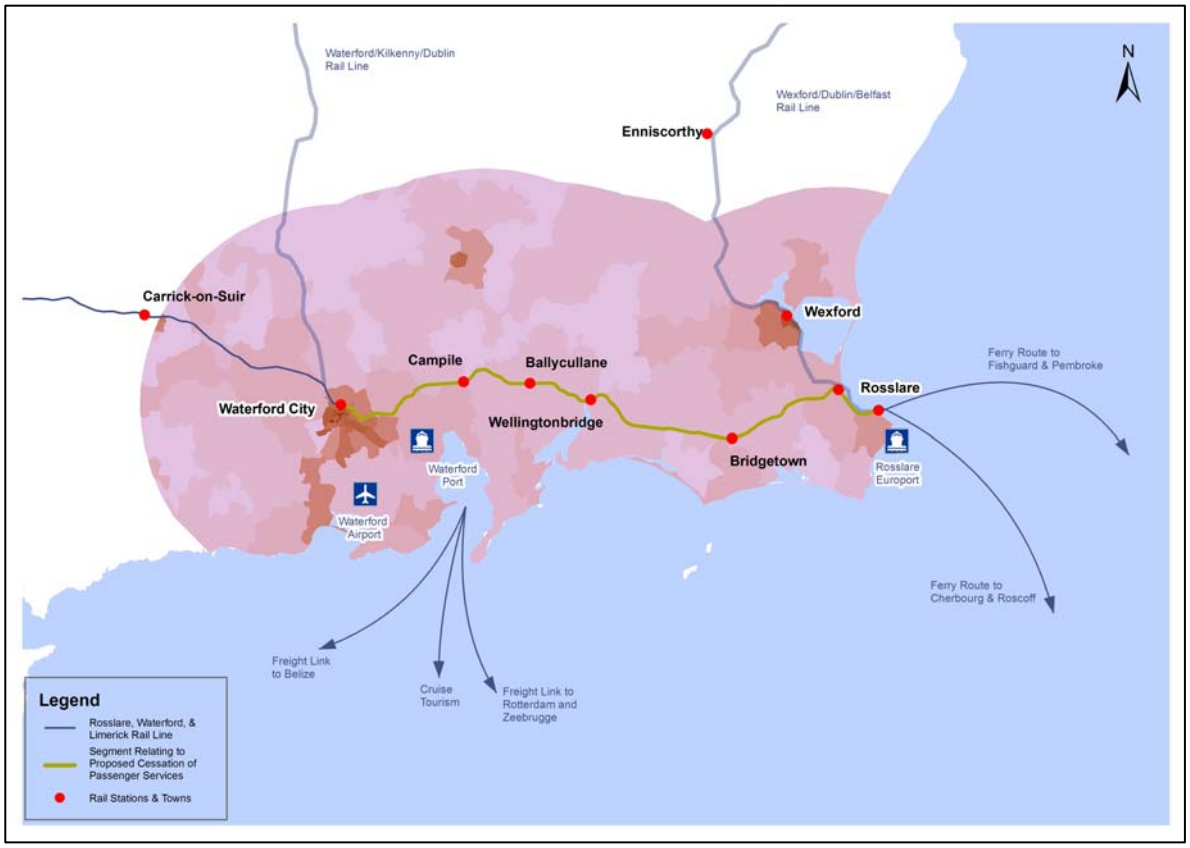
The Rosslare-Waterford line is the eastern-most part of a rail line that crosses southern Ireland linking three radial lines from Dublin (to Wexford/Rosslare, Waterford and Cork/Limerick) and the Western Rail Corridor. The following map shows the population densities within 20km of the line from Rosslare-Limerick.



Map 4.1 Rosslare-Waterford-Limerick Population Densities (2006) within 20km Catchment Buffer

The population density map above shows population centres around Limerick, Clonmel, Waterford and Wexford. The Rosslare-Waterford rail line physically links the hub town of Wexford and the gateway city of Waterford. Approximately 424,000 people live within 20km of the total line with some 316,000 people living within 10km of the line.

The Rosslare-Waterford segment of the line is the line proposed for closure. The following map shows the 20km population densities in greater detail. Some 165,000 people live within 20km of the line, with 118,000 living within the narrower 10km corridor and a further 7,000 living outside that range but within 10km of Wexford station (making a total of 125,000 within the Wexford/Rosslare-Waterford 10km rail corridors). Of those, some 21,000 are closest to the four intermediate stations.



Map 4.2 Rosslare-Waterford Population Densities (2006) within 20km Catchment Buffer

POWCAR Analysis for Wexford/Rosslare-Waterford

To consider employment at these two centres, we have analysed the 2006 Census 'Place of Work - Census of Anonymised Records' (POWCAR) provided to us by the Central Statistics Office. We have analysed places of work close to Waterford station and along the Wexford/Rosslare corridor.

The current rail service could be used by commuters travelling in to Waterford in the morning from the Wexford/Rosslare end of the line and from the intermediate stations, provided they can reliably get to the station for the 17.20 return train. It is not possible with the current timetable to return to Wexford, only to Rosslare Strand and Rosslare Europort. Our analysis of the POWCAR data suggests that employment and commuting patterns to Waterford in 2006 were as follows:

Places of work in Waterford *EDs within 5 kilometres of station*	Workers
Total at work in area	18,906
Total workers living close to relevant stations	18,621
from 2006 POWCAR, commuters living in EDs near:	
Campile	95
Ballycullane	103
Wellingtonbridge	31
Bridgetown	27
Wexford/Rosslare	110
Total commuters in 2006	366

Table 4.1 POWCAR Data Analysis (2006) Relating to Wexford, Rosslare and Waterford Rail Corridor

We have taken the following Electoral Divisions (EDs) as being close to the intermediate stations, all in County Wexford[5]:

Station	Electoral Divisions
Campile	Ballyhack, Kilmokea, Whitechurch
Ballycullane	Dunmain, Fethard, Inch, Killesk, Rathroe, Tintern
Wellingtonbridge	Ballymitty, Bannow, Clongeen, Harristown
Bridgetown	Bridgetown, Duncormick, Harperstown, Kilcowan, Killag, Kilmore, Tomhaggard

Table 4.2 Identified Electoral Divisions Relating to Intermediate Stations on the Rosslare-Waterford Rail Line

Of the 366 commuters identified above, 226 have a place of work within 2km of Waterford station. The number of commuters only increases to 390 for places of work within 10km of the station.

We have also considered employment at the other end of the line. The east-bound commuter market to Wexford/Rosslare is not currently served by the rail timetable at all.

Places of work in Wexford/Rosslare	
EDs along rail corridor	Workers
Total at work in area	11,755
Total workers living close to relevant stations	36,426
from 2006 POWCAR, commuters living in EDs near:	
Waterford	126
Campile	35
Ballycullane	147
Wellingtonbridge	178
Bridgetown	612
Total commuters in 2006	1,098

Table 4.3 **E**ast-Bound Commuter Market to Wexford/Rosslare based on POWCAR Data Analysis (2006)

Comparing this Wexford/Rosslare table (Table 4.3) with the previous one for Waterford (Table 4.1) suggests that the number of people commuting east to Wexford/Rosslare is substantially larger, by a factor of about three, than the number of people commuting west to Waterford, even though Waterford is the larger centre of employment. Even taking account of the fact that about half of these commuters would require only a short trip from Bridgetown, it would appear that the current direction of the Rosslare-Waterford service (west-bound in the morning, east-bound in the afternoon) can address only the smaller of the two commuter markets for working people. The timing of the return service would appear to limit its attraction even for that market.

Broadly speaking, 2% of workers in Waterford commute in from further east along the line, while some 9% of workers in Wexford commute in from further west along the line (about 10% for those aged 25-49, slightly less for 15-24 and 50+ age groups).

The following table identifies where places of work are on the Wexford/Rosslare rail corridor, showing that the bulk of them are in Wexford.

[5] Note that we have used a more limited definition of EDs close to intermediate stations for our POWCAR analysis than the simple 10km corridor that we have used for consistency in our comparator analysis with lines in the UK.

Places of work in Wexford/Rosslare	Workers	Commuters
Drinagh	1,104	118
Kilscoran	103	14
Rosslare	393	27
St. Helens	787	51
Wexford Rural	3,615	380
Wexford Urban No.1	2,269	184
Wexford Urban No.2	1,533	154
Wexford Urban No.3	1,951	170
Total employment in 2006	11,755	1,098

Table 4.4 Identified EDs Places of Work on the Wexford/Rosslare Rail Corridor

Characterising the Wexford/Rosslare-Waterford rail market

This analysis suggests that the demographic and policy logic is for the Rosslare-Waterford line to service a wider market incorporating Wexford and reflecting two-way flows. It would link two county capitals, a designated Gateway and a designated Hub, two significant employment centres each employing in excess of 10,000 people, a major passenger ferry gateway at Rosslare (owned and operated by IE), a thriving airport just south of Waterford, another port principally serving freight customers at Waterford and with further rail links across southern Ireland and to the Western Rail Corridor.

It would appear that there should be scope for a rail service to serve a two-way commuter market, business links, a market for tourists from the UK, people travelling for retail and leisure purposes, enhancing links between communities and giving people who live close to intermediate stations better access to the wider rail network.

At present, the rail service provides a limited service for a one-way commuter market focused on students. We do not consider the numbers of passengers using the current service provides any meaningful indication of the potential for passengers using the line. It is clear that, to secure the full potential of the line, a more frequent service would need to be provided, serving the locations where and when demand is likely to be, opening up new markets for rail travel and giving passengers more flexible rail travel options than they have at present.

The key question is how many passengers might we reasonably expect to travel on the line under a timetable that meets a reasonable modern standard.

To help answer this question, we have considered four comparator lines in the UK.

4.4. Comparative Analysis

Comparative methodology

Following discussions with a number of bodies in the UK, notably the Department for Transport, Network Rail and the Association of Community Rail Partnerships (ACoRP), we identified four relatively remote rail lines in the UK for comparison. We characterised the population base for the Rosslare-Waterford line and, in the same way, characterised the population bases for the comparator lines. We obtained passenger usage data for the comparator lines from publicly available sources and directly from the relevant train operating companies.

In part for simplicity, we have characterised the population bases using a simple rule of 10km distance from the rail line. We are aware that a simple 10km rule does not reflect the complexity of the likely catchment areas for the respective lines, but by applying the rule consistently it provides a meaningful measure of relative populations from which we can draw broad conclusions.

For each line, the Rosslare-Waterford line and the comparator lines, we measured populations within a 10km distance of the rail line using population data at Electoral Division level for Ireland and District Ward, Unitary Authority Electoral Division or Unitary Authority Ward level in the UK (for convenience, defined as 'EDs'). Irish population data is from the 2006 census. UK population data is from mid-year 2007 population estimates provided by the Office for National Statistics. We identified the rail lines and drew the population

boundaries using GIS software, identified the relevant EDs and proportion of EDs, where relevant, inside the boundary. We excluded populations in Chester and Great Yarmouth where the existence of more direct services on other lines would make it unlikely that people from those centres would access intermediate stations on the comparator line. For each line, we identified intermediate stations, stations on the comparator line that are distinct from main centres of population which have access to the rail network from main line stations. Intermediate stations on Rosslare-Waterford are Campile, Ballycullane, Wellingtonbridge and Bridgetown.

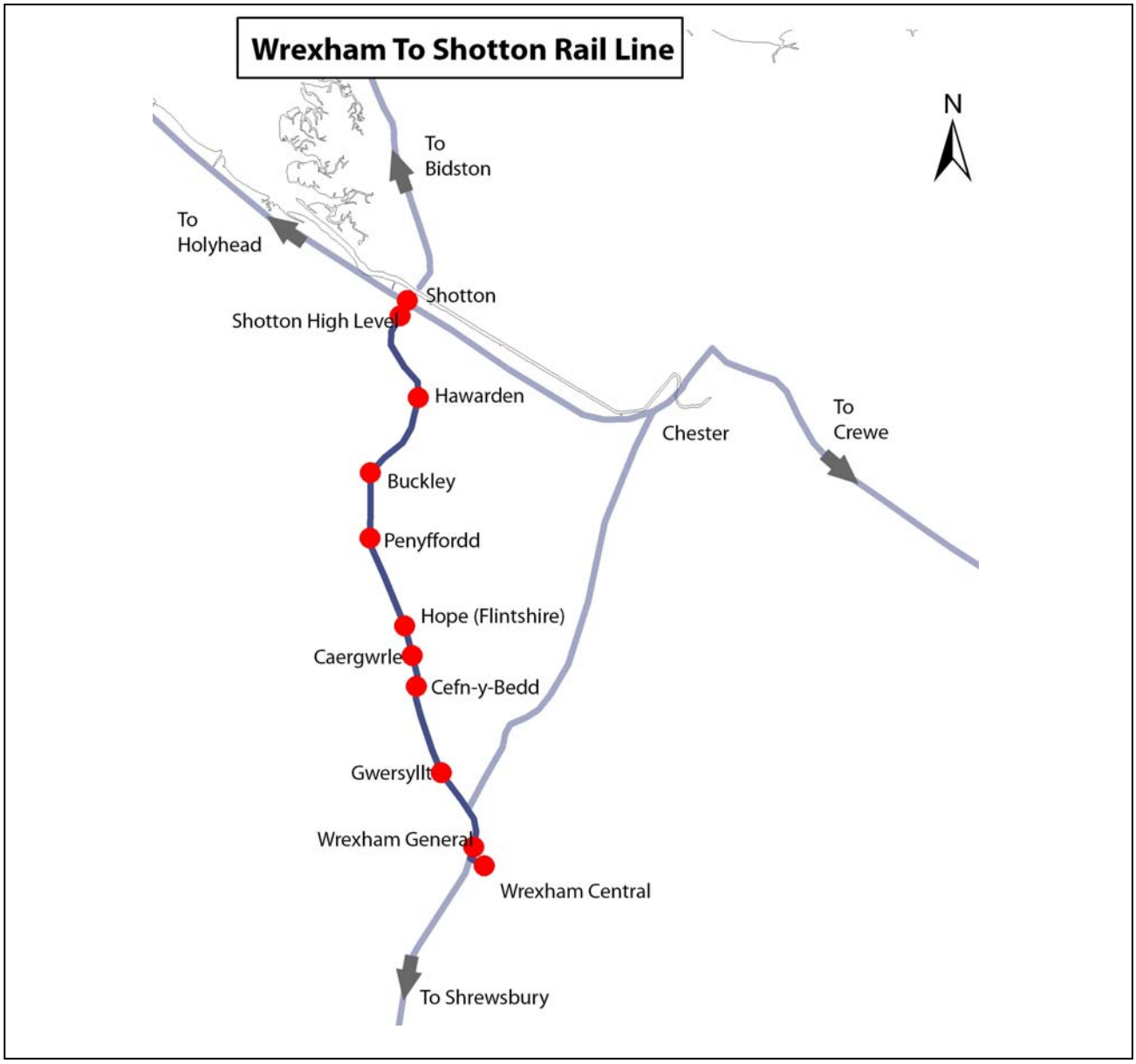
In addition to considering basic population statistics, we considered a range of other factors relevant to an estimate of potential traffic levels. These include centres of employment, the existence of other transport infrastructure (including main line rail services, road, ports and airports) and the scope for economic interaction between major employment and population centres.

Comparator lines

Of the four lines we identified following discussions with relevant organisations, two are designated as Community Rail Partnerships and the other two have partnership arrangements in place and are proposed for designation[6]. We describe these lines briefly as follows:

Wrexham-Shotton, 'Borderlands' – this is a relatively short route of 20km in North Wales between two stations that are also connected to main lines. The line continues from Shotton to Bidston. It is possible to travel between Wrexham and Shotton on the main line via Chester. However, services are frequent (16 each way daily) and the journey time is little over half an hour. The view from our contact at the train operating company, Arriva Trains Wales, is that the line mainly serves intermediate stations rather than end-to-end. Of all the comparator lines, this line has the highest population density along its route.

[6] Formal designation confers some advantages as it enables exemption from some EU legislation which is inappropriate for lines that are local in nature.

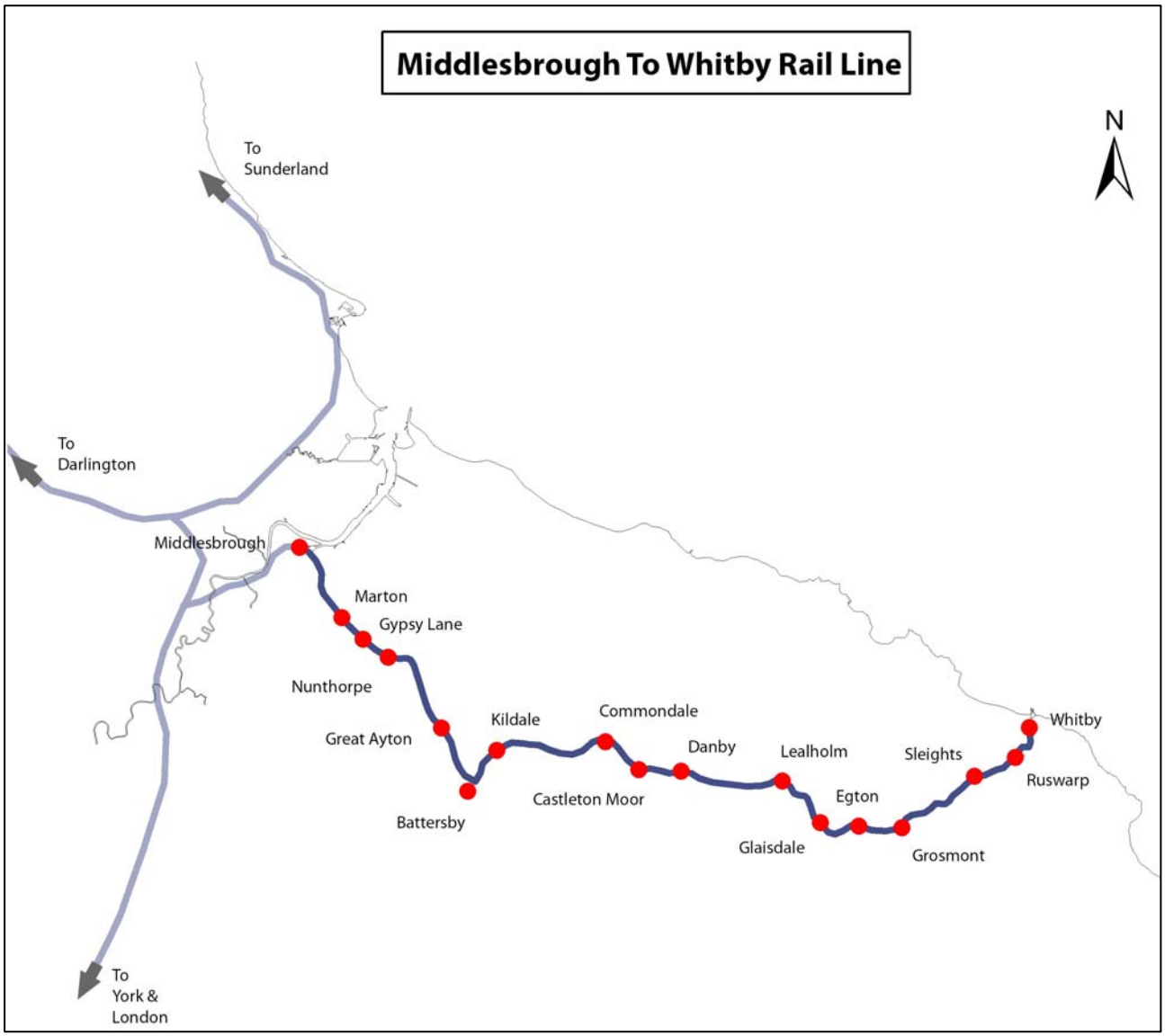


Map 4.3 Illustration of the Wrexham to Shotton Rail Line, UK

Swansea-Shrewsbury, 'Heart of Wales' – this is a long route of 190 km, similar in length to Rosslare-Limerick, serving a number of communities in relatively sparsely populated mid-Wales. Route frequency is relatively low at 4 services each way daily. It is possible, and often quicker, to travel between Swansea and Shrewsbury by mainline via Newport or Cardiff Central.

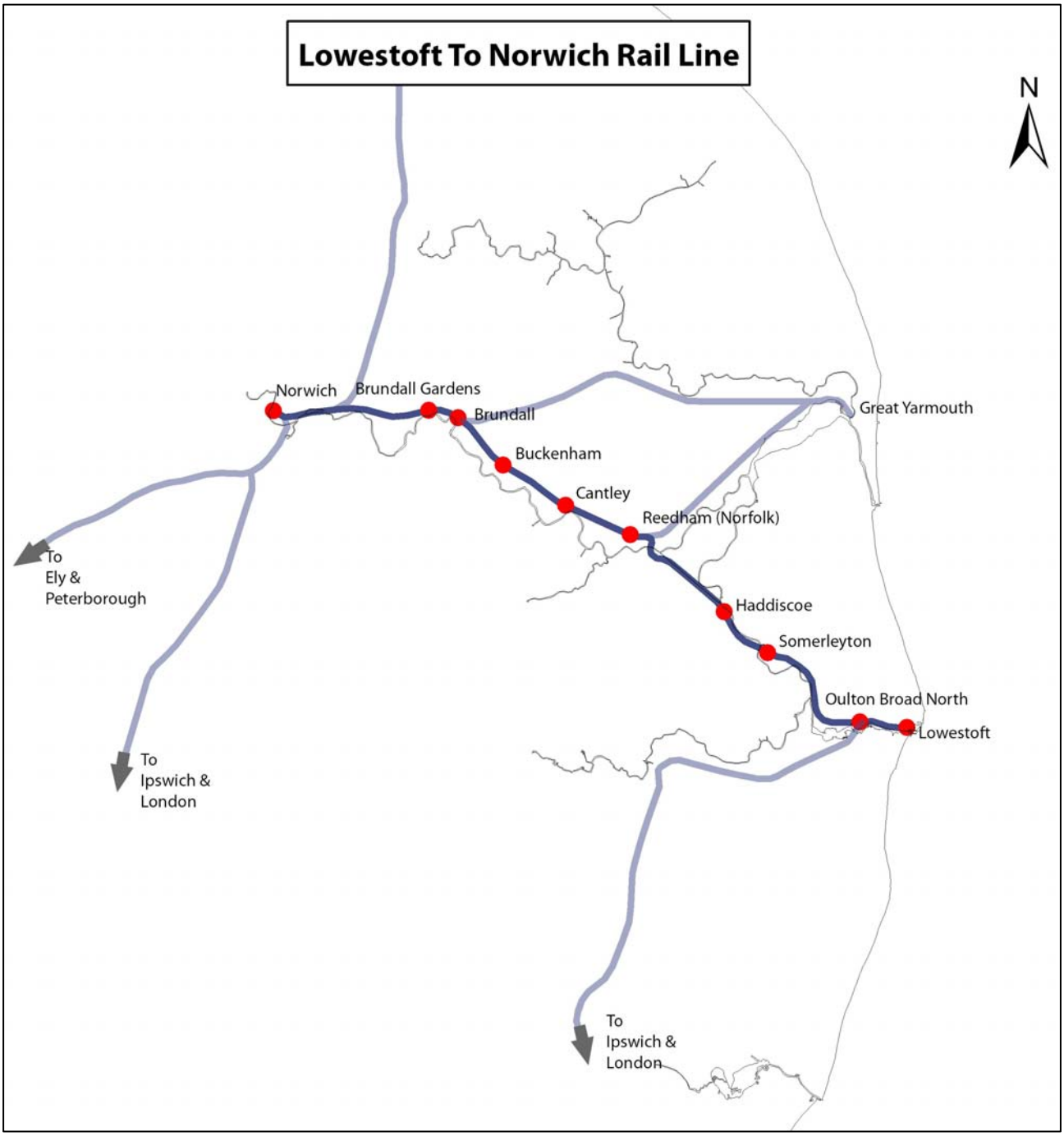
Map 4.4 Illustration of the Swansea to Shrewsbury Rail Line, UK

Middlesbrough-Whitby, 'Esk Valley' – this is a short 54km line linking Middlesbrough with the seaside town of Whitby and a number of intermediate villages across the North Yorkshire Moors. The line has a history of constrained timetables which has meant is has not been able to address the commuter market into Middlesbrough.



Map 4.5 Illustration of the Swansea to Shrewsbury Rail Line, UK

Norwich-Lowestoft, one of the 'Wherry' lines – this is a 38km route linking Norwich and Lowestoft. Both Norwich and Lowestoft have direct services to London Liverpool Street using other lines (travelling via Ipswich). The Norwich-Lowestoft line has a particularly frequent service (19 services each way daily) and is used primarily for travel between the centres and gaining access to the route across East Anglia to Ely and Peterborough.



Map 4.6 Illustration of the Lowestoft to Norwich Rail Line, UK

Line metrics

To inform our analysis, we have compiled a number of measures relevant to each of the comparator lines and for the current Rosslare-Waterford service, considering separately the metrics for the overall line and for the part of the line serving intermediate stations:

10km zone around lines	Wrexham-Shotton	Swansea-Shrewsbury	Middlesbrough-Whitby	Norwich-Lowestoft	Rosslare-Waterford	Rosslare-Limerick
Overall line						
Population	249,000	619,000	472,000	365,000	118,000	316,000
Length (km)	20.8	189.5	53.9	37.8	61.8	186.2
Line density (pop/km)	11,971	3,266	8,757	9,656	1,908	1,697
Typical service time	0h 37m	3h 20m	1h 30m	0h 43m	1h 20m	6h 33m
Average speed (km/h)	34	57	36	53	46	28
Area (sq km)	581	3,819	1,193	800	1,082	3,485
Pop density (pop/sq km)	429	162	396	456	109	91
Daily passenger counts	600[7] (est)	500	1,300	1,600	45	
Services each way daily	16	4	7	19	1	
Typical pax/service	19	63	93	42	23	
Typical daily pax/km	29	3	24	42	1	
Daily pax/trainkm	0.90	0.33	1.72	1.11	0.36	
Intermediate stations						
From:	Hawarden-	Broome-	Great Ayton-	Buckenham-	Campile-	
To:	Gwersyllt	Pantyffynnon	Sleights	Somerleyton	Bridgetown	
Intermediate stations	7	25	11	5	4	
Population	95,000	87,000	40,000	42,000	21,000	
Population per station	13,571	3,480	3,636	8,400	5,250	
Length (km)	13.4	121.6	36.2	21.2	39.5	
Line density (pop/km)	7,090	715	1,105	1,981	531	
Area (sq km)	197	2,447	735	348	554	
Pop density (pop/sq km)	481	36	54	121	38	
Total entry & exits, 2009	176,762	185,976	99,642	77,800		
Ave daily entry & exits	484	510	273	213		
Entry & exits /station	69	20	25	43		
Entry & exits /1000 pop	5.1	5.9	6.8	5.1		

Table 4.5 Analysis of Line Metrics for Selected UK Rail Lines

Observations and projections

We have made a number of high level observations.

The Rosslare-Waterford and Rosslare-Limerick lines are relatively sparsely populated overall, but not an outlier in relation to the comparator lines around the intermediate stations. The overall population density

[7] For Wrexham-Shotton, the company was not able to give us passenger counts specific to the service but suggested an estimate reflecting relatively little end-to-end traffic.

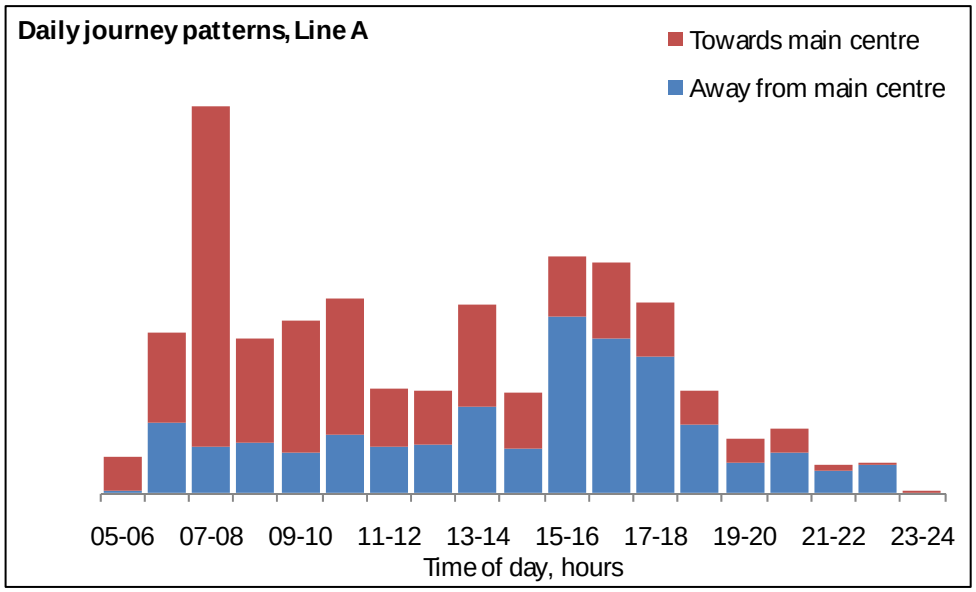
difference is driven by the fact that the main centres of population on the Irish line are relatively small compared with most of those on the comparator lines.

Average speeds are broadly comparable, although the Rosslare-Waterford line has the prospect of improved speeds after the budgeted safety improvements are made to the line.

The populations per station surrounding each intermediate station on the Rosslare-Waterford line are in the middle of the range.

Of all the metrics on the comparator lines, the number of exits and entries per 1000 population on intermediate stations appears to be surprisingly consistent. The entry and exit data is taken from Delta Rail statistics published by the UK's Office of Rail Regulation and is derived from ticketing information using the LENNON system and, for some classes of tickets, is subject to allocation between stations. It appears that in the case of Middlesbrough-Whitby, there is a significant disparity between the station entry/exit data and the automatic passenger counts taken on the trains – the counts indicate nearly double the number of passengers on the line than can be accounted for by entries and exits. This may reflect an artefact of the allocation process that might understate passengers on rural lines. However, we have taken the entry/exit data at face value and concluded that it would be reasonable to expect a well promoted rail service to achieve between 5 and 7 station daily entries and exits at intermediate stations for each 1000 of population.

These estimates may only partly take account of daily commuting journeys. It appears that none of the lines are primarily addressing commuter markets. Of those we thought might, one, the Middlesbrough-Whitby line, appears to have timetable issues that render the service ineffective for commuters working in Middlesbrough. On another, we have been shown detailed information on a confidential basis, the following graph of which shows some suggestion of commuter traffic:



Graph 4.1 Daily Journey Times, Line A

However, although there is an early peak of departures leaving in one direction towards the larger centre before 08.00 in the morning, there is a less pronounced peak returning between 15.00 and 18.00. The relatively relaxed mid-afternoon start to the return flows reflects the fact that much of the morning peak traffic relates to children using the trains to get to school rather than conventional 9-to-5 commuters. Commuting to work is only a relatively small part of the market on this line.

Extrapolating the results for the comparator lines would indicate some 100-150 entries and exits for the stations Campile-Bridgetown. To the extent that journeys would start or end at the Waterford or Wexford/Rosslare ends of the line, that would mean some 100-150 journeys or 50-75 daily journeys each way.

Considering the number of passengers that might travel between Waterford and Wexford-Rosslare is more difficult to judge. The terms of reference for this study do not extend to us carrying out route modelling, but

we have considered the data available to us and the enquiries we have made of managers at the train operating companies operating services on the comparator lines. We have considered the overall level of passengers on the lines, the relative sizes of the populations on the lines and the broad characteristics of those lines.

For all four comparator lines, the entry and exit data suggest that town and urban dwellers use rail services rather more than those using intermediate stations, with daily entry and exits averaging about 20 or more per 1000 population. These populations are relatively remote from the heavily used London rail system. However, only a small proportion of these would be expected to use one particular line.

Taking into account the journeys represented by entries and exits at intermediate stations, we have identified the residual number of daily journeys that would correspond to end-to-end traffic on the comparator lines. We have discounted data from Wrexham-Shotton and Swansea-Shrewsbury where alternative main line services are available and the data suggest low levels of end-to-end traffic on the rural option. For the other two lines there is significant end-to-end traffic. After deducting Whitby traffic on to the main line via Middlesbrough (since Whitby is not directly served by a main line), end to end traffic on these lines represent 2.0 to 4.3 journeys per 1000 of population. We consider that the lower figure is likely to be affected by the timetabling issues on the Middlesbrough-Whitby route and the relatively small size of Whitby in relation to Middlesbrough.

We would expect the level of end-to-end journeys to vary depending on the extent of economic and other linkages between two population or employment centres and other sources of demand for rail travel. A number of factors suggest there could be strong linkages between Wexford and Waterford. They are both county capitals, both within the South-East Region,, both represent significant centres of employment and population, Waterford boasts a very successfully operating airport, Rosslare boasts a major ferry connection with Wales and France, and the Rosslare-Waterford line links two radial routes out of Dublin. Most importantly, as described in Section 3 above, the NSS for the South-East Region identifies Waterford as a Gateway, supported by Wexford and Kilkenny as Hubs, forming a nationally strategic ‘growth triangle’ with a critical mass of population. The Wexford-Waterford relationship, as part of the Waterford-Wexford-Kilkenny triangular relationships, would appear to have the potential to be more interlinked than the generality of population centres connected by our relatively rural comparator lines in the UK. Rail lines currently link all three. We consider it is reasonable to expect economic inter-linkages between these centres to be increasingly relevant to the region’s development and a basis for active use of a good, frequent rail service.

On the other hand, we recognise that Waterford station is inconveniently placed across a bridge from the main centre of Waterford itself including the city’s main Bus Terminus, that Wexford is not currently served by the Rosslare-Waterford rail service at all and that the current service is too infrequent to generate significant levels of traffic. Consequently, levels of awareness of rail services are low and traditions of travelling by train along the line are virtually non-existent.

We consider that these obstacles are not insurmountable, but it seems clear that achieving the potential value of the line will require considerable locally-oriented development and co-ordinated effort. Our discussions with parties in the UK have convinced us that a national rail operator is not well placed to drive those activities as it does not have the local focus and addressing the complex needs of a local market is likely to be peripheral to the national-level core network objectives of the organisation. Instead, we consider that successful development of the line will require a different model. Drawing from the UK experience, we consider it would be necessary to establish a local focus and a way for local interests and Iarnród Éireann to work together, along the lines of a Community Rail Partnership (CRP). Such an arrangement should help achieve the following:

- Running services between Waterford and Rosslare/Wexford
- Running services frequently
- Integrating timetables with local bus routes and ferry services, including at Waterford station
- Active joint development of tourist attractions along the route and towards the west to local, UK and Continental European markets
- Rail awareness programmes and other market development activities
- Station adoption and sponsorship schemes.

The potential is there for a reliable frequent service to start to change travelling behaviour and, in due course, to influence people’s strategic choices about where they live and work and affect economic and other relationships between communities, towns and cities in the region, particularly those identified as strategic for national and regional development objectives.

Taking a number of factors into account, we have estimated the following scenarios:

Scenarios on Wexford/Rosslare-Waterford	Daily journeys
Close the line	0
'Do nothing'	50
Increase frequency to 3 services daily, Rosslare-Waterford	75 - 150
Introduce more frequent services incorporating Wexford	300 - 500
Active involvement of a Community Rail Partnership	600 - 800
Longer-term prospects	800 - 1,200

Table 4.6 Passenger number scenarios for the Wexford/Rosslare-Waterford line

Benchmarks for economic operation

We recognise that we have not been able to carry out a full costing and cost-benefit analysis of the service concept that would be needed to achieve the usage levels that we believe should be possible. In common with other rail services, and indeed the generality of public transport services, it is likely that the service would require continuing public subsidy. The economic case for supporting the service is structured by the broad policy framework that we have outlined in section 3.0.

Integral to the assessment would be the dominance of fixed costs on the line – that the incremental costs of additional services beyond a minimum level of, say, three each way daily would be relatively small. In the case of the illustrative timetable we outline in section 4.6 below, the service would require two trains to be operated on the line.

Our overall observation is that traffic levels of about 500- 600 passengers daily would represent usage levels on a per service basis somewhere in the middle of the range for the comparator lines we have looked at, lines which are considered reasonably successful in the UK. We would expect a decision to support passenger services on the line on these terms when there is some prospect of exceeding traffic levels of the order of 500-600 would be consistent with national and regional policy objectives.

4.5. The Community Rail Partnership Concept

In drafting this section, we have drawn heavily from a number of Community Rail publications, identified in the Reference section, and from our discussions with officials and managers at the Department for Transport, Network Rail, the Association of Community Rail Partnerships and a number of train operating companies.

During the course of this study, we have become progressively aware of the parallels with experience in the UK in community rail lines. These are lines which are peripheral to the core national rail network but are nevertheless considered vitally important for the towns and villages they serve. During the formative period in rail policy development in the UK over the past decade, policy makers have acknowledged the important role that community rail lines play while recognising that their development demands a more local business focus than the national rail operator or the major franchised train operators can provide, or can be expected to provide.

UK's Community Rail Development Strategy

A number of the early Community Rail Partnerships evolved from active user groups addressing local issues, such as threatened closures of rail services, as they started working closely with train companies or Network Rail to address the economic issues that lay behind those threats. In 2004, the Strategic Rail Authority recognised the value of these partnerships and launched the Community Rail Development Strategy. It is now the responsibility of the Department for Transport.

The strategy sets out four objectives:

- Increasing ridership, freight use and revenue
- Managing down costs
- Greater involvement of the local community
- Enabling local rail to play a larger role in economic and social regeneration.

The Strategic Rail Authority acknowledged that *'Railways represent a long-life fixed investment, and closures leave huge residual liabilities, which have to be managed. Closures are hotly contested and the closure process takes significant senior management time to handle, with limited cost savings achievable.*' The immediate economic aim was to narrow the gap between income and costs.

Although allocating costs to different parts of the network is not straightforward, the strategy recognised that community rail services generally require substantially more support per journey than the average for the national network. The justification for this support was, and remains, in terms of reducing congestion, supporting local economies, providing community transport services for communities with relatively poor roads and poor access to urban facilities, environmental benefits and changing patterns of population.

It recognised in particular that "*Many parts of rural Britain are experiencing significant population growth and this is expected to continue in line with Government policy. Many people now seek the quality of life associated with rural living with the benefits of access to the facilities provided in cities. This is dependent on quality transport links to towns and cities from expanding rural areas, which rail is uniquely well placed to offer.*" These comments have parallels with Irish rural settlement patterns and growth over the last two decades.

Seven lines were identified as pilots for the strategy and since then a further 20 lines have been designated as Community Railways. A total of 50 lines have been identified as lines that may benefit from a Community Rail Partnership approach.

The purpose of designation as a community rail line is to permit the line to be operated or engineered to standards appropriate to the nature and volume of traffic being handled, involving derogation of existing standards as permitted under EU legislation and supported by risk assessments. Designation is not necessary for there to be an effective Community Rail Partnership.

However, integral to the strategy is that services on a community rail line are supported by a Community Rail Partnership (CRP).

Community Rail Partnerships

CRPs are not-for-profit organisations comprising local authorities, community groups, rail user groups and train operators, and may also include local businesses, other public bodies and other transport service providers.

Typically, the CRP employs a CRP officer and the larger ones may employ one or two supporting staff. The role of the CRP is to promote and develop the railway for the benefit of the local community whilst recognising that, to be successful, it has to deliver more passengers and other benefits for the railway itself. The CRP is able to mobilise the resources of the partner organisations to these ends, which can include financial sponsorship, management time, influence and ideas. Typically, the CRP officer and associated office costs are funded by the local authority partners.

The trains and the infrastructure continue to be run by the train and rail operator. In the UK, train operators and Network Rail have generally been supportive of the idea of community rail and sometimes provide direct financial support to their partnerships and staff time to joint projects. Network Rail has set up a small dedicated team to work with partnerships.

The main focus of CRPs is local, small scale and changing the way people think about the railway, but with a big cumulative impact on the relationship between the railway and the communities it serves.

CRP Activities and Benefits

Creating a sense of local involvement

CRP officers have an enabling role, bringing together individuals and organisations from the local community who work alongside local authorities and the rail industry. Local focus, involvement of local organisations and volunteer engagement all help to create the distinctiveness of Community Rail Partnership lines compared to other parts of the national network. This changes the relationship between communities and their railway for the benefit of both. Examples include:

- *Promoting and coordinating station adoption and other volunteer schemes.* Station adoption schemes involve local people, 'adopters', in caring for and taking pride in their local railway station. Volunteer activities can range across station gardening, decorating, renovating, redeploying and providing local services from otherwise redundant station buildings, securing sponsorship and raising other funds for small scale projects. In Wales, some 167 of 204 stations have been adopted[8]. In the UK as a whole, a study for ACoRP estimated that there are some 4,000 volunteers working in the national rail network, contributing in excess of 1.2 million hours of work annually, most importantly under CRPs. Typically, volunteers are young people or those over 45. The experience in the UK is that many organisations, youth and other groups, schools, universities and businesses encourage their students, members or employees to take part in volunteering, and a CRP can provide structured projects and a local focus to help energise those efforts for the benefit of the local community and the railway.
- *Harnessing and expressing local identity.* This can range from giving rail lines or even individual trains locally significant names (we can imagine a train called 'Kelly, the Commodore John Barry, the William Wallace or the boy from Killane' running on the 'Barrow Bridge Line') to helping a station become a proud gateway into the community.
- *Making rail stations centres for local services and local information.* For example, using otherwise redundant station buildings as a resource for the community.

Information and marketing activities

CRPs are distinctive in having a sustained focus on one line and their interest in the end to end journey and integrating local rail with the local economy. This end to end journey approach is also what people need to help them in choosing where and how to travel. A large part of the CRP's work is in raising awareness of rail as a convenient, comfortable, environmentally friendly and flexible way of travelling. Raising awareness may involve a wide range of activities including outreach into schools, universities, businesses, local groups and other places where people go, meet and talk to each other. Increasingly, web sites and other new information technologies are important in journey planning and more generally in promoting the local rail and other CRP activities.

Implementing local schemes

Community Rail Partnerships are well placed to lead or coordinate implementation of schemes which directly increase rail use. Schemes typically include discounted entry at local visitor attractions, guided walks, music trains, Santa services, cycle integration schemes and so on. These schemes often go hand in hand with information and marketing activities.

Providing a focus for investment and service improvements

CRPs are well placed to identify and articulate local needs. The CRP officer can work with the partners, and notably the rail company, to lobby for improvements and, working with local authorities, attract external funding for better facilities and services. Improvements can include timetables that better meet the needs of local people or local businesses and better integration between different transport services. CRPs can also help maximise the effectiveness of improvement schemes, through attention to the detail of local needs, complementary schemes and marketing. Importantly, the involvement of a CRP can help reassure external funders that proposed investments will deliver benefits that meet the relevant social or economic objectives.

The role of a CRP in transforming the prospects for the Rosslare-Waterford line

We recognise that the challenge for the Rosslare-Waterford line is not just a matter of making incremental improvements. At present, the line is hardly used at all. It is the contention of this report that the line has the prospect of being very substantially more effectively used. That could be achieved by making much better use of existing infrastructure, and thus not requiring much additional investment spend. However, we recognise that Iarnród Éireann's national-level objectives and its necessary focus on its core rail network mean that it is poorly placed, institutionally and culturally, to have the local focus, energy and imagination that would be needed to transform the line's prospects.

We consider that a different market-facing model would be required, and our conclusions on the potential scope for the numbers of passengers using the line in the future are contingent on a different model being successfully put in place.

[8] Arriva Trains Wales website, 15 July 2010

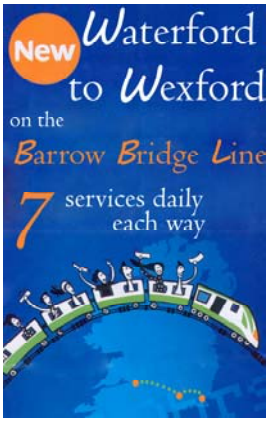
The CRP concept appears to be suited to the task and there is a wealth of experience in the UK that could be tapped. We are assured by those we have spoken to in the UK that there would be a real interest in providing assistance and co-operation in helping make a success of an Irish CRP.

Recommendations

We therefore recommend that a CRP is established. It would be important that the regional and local authorities take a leading role in establishing the CRP, funding it and attracting meaningful involvement by other partners. We also consider it will be necessary for Iarnród Éireann to be involved as a core member of and enthusiastic participant in the partnership. This may require engagement between Iarnród Éireann and the regional and local authorities at a senior level and possibly also at a Departmental level within Government. A direction from the NTA following its decision on Iarnród Éireann's proposals to close the passenger services on the line may be an important starting point.

An early decision would be needed on the scope of the CRP – whether it would cover just Wexford/Rosslare-Waterford or the whole Wexford/Rosslare-Limerick route and whether services to and from Kilkenny might also be covered. We consider that a Wexford/Rosslare-Limerick route would be a big challenge for a CRP and, in such a case; the CRP officer may need further staff to assist him or her.

4.6. An illustrative Timetable



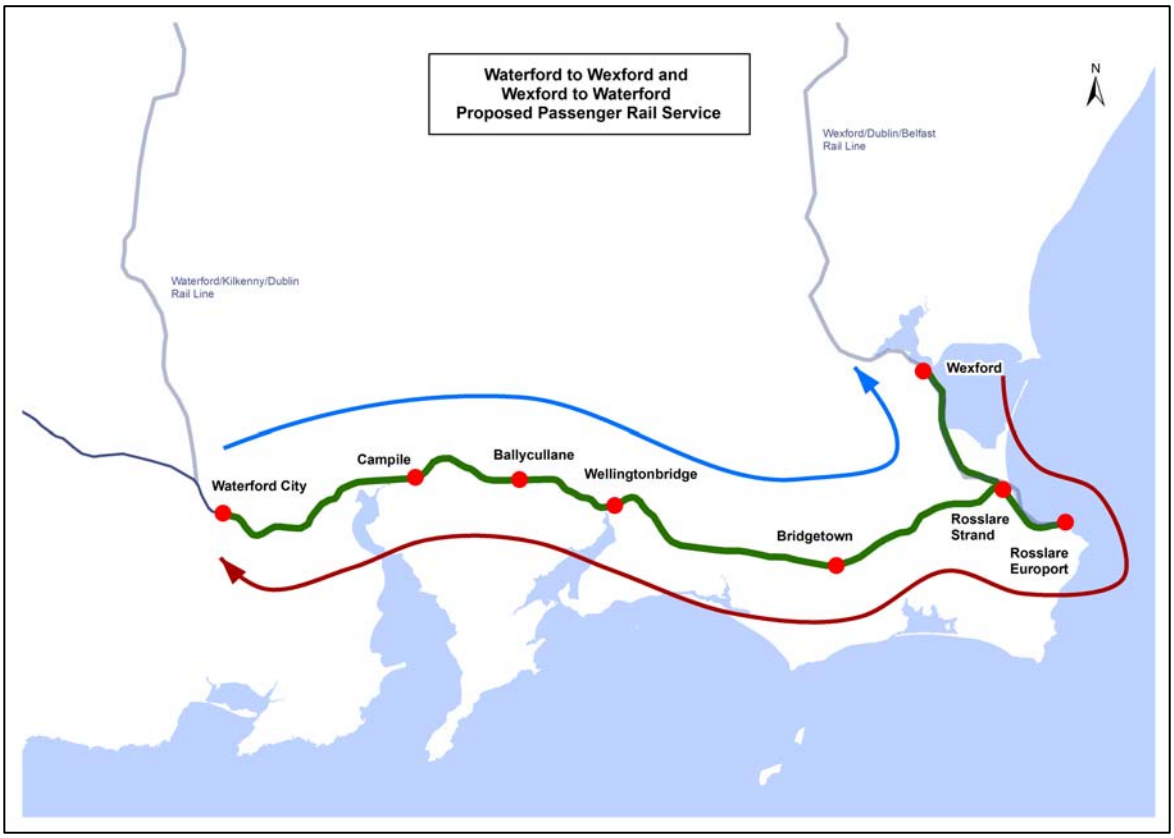
Our analysis has identified that a more frequent service would be necessary to secure the potential of the line. To consider the feasibility of a more frequent service, we have developed an illustrative timetable for a two-way service for two trains running simultaneously on the line.

The illustrative timetable takes into account existing track speeds, a passing loop at Wellington Bridge and some scope for passing trains at Rosslare Strand. We have sought to minimise conflicts with existing services between Rosslare and Wexford. While we recognise that there would almost certainly be a need for Iarnród Éireann to carry out a more detailed analysis before designing a timetable that would be fully feasible, our analysis suggests that it should be possible to do.

Our illustrative timetable would provide up to seven services daily each way, mainly on a 2-hourly cycle, as follows:

Waterford		07:08	09:08	11:08	13:50	15:47	17:44	19:41
Campile		07:31	09:31	11:31	14:13	16:10	18:07	20:04
Ballycullane		07:39	09:39	11:39	14:21	16:18	18:15	20:12
Wellingtonbridge *(arr)*		07:46	09:46	11:46	14:28	16:25	18:22	20:19
Wellingtonbridge *(dep)*		07:51	09:51	11:51	14:33	16:30	18:27	20:24
Bridgetown		08:09	10:09	12:09	14:51	16:48	18:45	20:42
Rosslare Strand		08:23	10:23	12:23	15:05	17:02	18:59	20:56
Wexford		08:41	10:41	12:41	15:23	17:20	19:17	21:14
Rosslare Europort		*09:12*	*11:12*	*13:54*	*15:51*	*17:48*	*19:45*	
Wexford	06:49	08:49	10:49	13:31	15:28	17:25	19:22	
Rosslare Europort	07:12	09:12	11:12	13:54	15:51	17:48	19:45	
Rosslare Strand	07:17	09:17	11:17	13:59	15:56	17:53	19:50	
Bridgetown	07:31	09:31	11:31	14:13	16:10	18:07	20:04	
Wellingtonbridge	07:49	09:49	11:49	14:31	16:28	18:25	20:22	
Ballycullane	07:56	09:56	11:56	14:38	16:35	18:32	20:29	
Campile	08:04	10:04	12:04	14:46	16:43	18:40	20:37	
Waterford	08:27	10:27	12:27	15:09	17:06	19:03	21:00	

Table 4.7 Illustrative Waterford-Wexford Timetable for Passenger Train Services



Map 4.7 Illustration of Proposed Passenger Rail Service – Waterford to Wexford and Wexford to Waterford

4.7. The Prospect for Sail/Rail Traffic

Our quantitative analysis above considers only locally generated traffic – none of the comparator lines we considered serves a ferry port. At present, we understand that the passenger traffic on the ferry is substantially car-based and virtually no ferry passengers alighting at Rosslare Europort currently use the rail service to Waterford and beyond. The project team found it striking that, in their discussions with train operating companies and the UK Department for Transport, two people volunteered, with no prompting, that rail-ferry-rail on the Fishguard-Rosslare route is not attractive due to the lack of an integrated rail timetable at the Rosslare end.

Rosslare Europort is the country's second ferry port. The services operated are to and from Fishguard, Pembroke, Cherbourg and Roscoff, all of which are rail connected.

In 2009 Port of Rosslare handled 291,000 passenger vehicles (37% of the market) and a total of 920,000 passengers. The trend over the period from 1999 to 2006 was for a decline in passenger traffic, attributed in part to the impact of low cost airlines, but we understand that traffic levels rose subsequently and were higher in 2009 than they were in 2006 despite the effects of recession.

Both Irish Ferries and Stena Line are actively marketing Rail/Sail via Holyhead to Dun Laoghaire (see screen grab), but it does not appear to be actively marketed for Rosslare Europort.

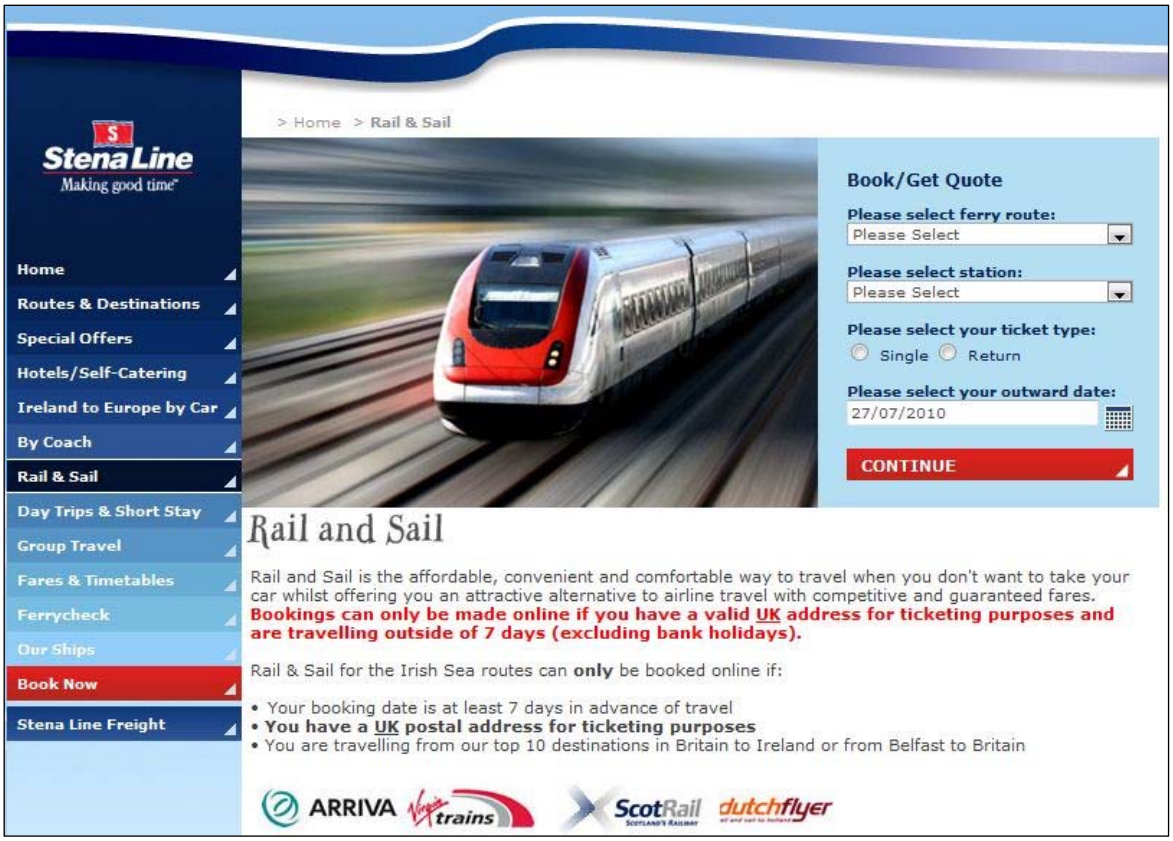


Figure 4.1 Rail and Sail marketing by Stena Line

It would seem natural for the South and West of Ireland to have significant potential to attract visitors from the UK and France. Place names such as Waterford, Limerick, Tipperary, Galway, Kerry and Cork are highly evocative to British ears but the area seems remote and difficult to get to. Many prefer to travel by train and find a train journey part of the adventure of going on holiday – one of our project team took his family by train to Italy last year rather than by air. It would appear that there would be scope to market the area for touring cyclists and for people hiring cars from a base in Ireland.

At this stage, we have not attempted to quantify the potential for this market, but it would appear to be substantially undeveloped at present. We consider that it may be a market that the CRP could explore with local firms involved in the tourism industry, with the Ferry companies and with Fáilte Ireland.

4.8. The Prospect for Freight

We have carried out a high level review of the prospect for freight traffic on the Rosslare-Waterford line and more broadly on the Rosslare-Limerick Junction line. Appendix A sets out our findings and identifies a number of existing businesses that could be potential freight customers.

Rosslare Europort handles roll-on roll-off (RoRo) freight traffic for which onward transport by road rather than rail would be natural. Waterford has a major port that handles lift-on lift-off (LoLo) freight traffic and would be a natural generator of rail freight business. Waterford has a good rail link to Dublin and, through the Waterford-Limerick Junction portion of the line, to the South and West of Ireland. Our review has identified some potential on the Rosslare-Waterford portion of the line which could be of significant importance for the freight business.

In addition, experience on community rail lines in the UK shows that small scale freight traffic can add useful revenue and need not depend on dedicated freight services. A good example of this kind of freight business is the transport of salmon on the ‘Heart of Wales’ line.

Our project team has identified a frequent passenger service as the principal strategic potential for the Rosslare-Waterford section of the line. Although the line is substantially single-track, and there would be limited additional scope for trains to pass each other on the line, the illustrative passenger services timetable we set out in section 4.6 would leave room for freight services in the middle and at both ends of the day.

Accordingly, we would expect the CRP would explore the potential of developing revenues from both small scale and dedicated freight services to supplement revenues on passenger services.

4.9. Conclusion

In this section we have drawn from the socio economic characteristics of the communities and centres that could be serviced by the Rosslare-Waterford rail line to identify an appropriate market strategy. We have drawn from experience on other rural lines that have been able to operate successfully, notably in the UK. We have identified that a strategy for a sustainable rail service would depend on meeting the diverse needs of the travelling public. In particular, it would be appropriate to incorporate Wexford fully into the service. We have identified that service frequency is a critical driver of patronage on a line. Providing a reasonable frequency of service makes travelling by rail rather more attractive and improves the economics of rail services, given the importance of fixed costs. We have also identified that interconnection with local transport services is highly relevant.

We have carried out comparative analysis of four rural lines in the UK to form an evidence base for our quantitative assessment of the potential for the line to attract passengers. Our analysis indicates that a service that is structured to include Wexford and meet the diverse needs of people travelling along the corridor, in particular regarding service frequency, has a reasonable prospect of generating substantially higher passenger numbers and reasonable load factors, comparable with those on the comparator lines.

The scope and timing of our report does not permit us to carry out a full cost analysis, but the evidence indicates that, properly promoted and with a frequent service, the line should be able to generate good traffic levels, contribute materially to national and regional policy objectives and help minimise the net subsidy.

The experience we have drawn from on community rail lines in the UK highlights the importance of a local focus in developing the market and the service. It appears to be genuinely not always realistic to expect an operator with national-level objectives and a natural priority on managing its core network to have the necessary local focus. It will require a new focus to reverse the rail line's history of decline and poor service levels and develop the line's real potential. Our conclusions regarding the scale of that potential are dependent on local organisations and Iarnród Éireann developing an approach along the lines of a CRP.

This section identifies a promising and logical strategy for developing the line's potential and, after considering the evidence, concludes that such a strategy should have a reasonable prospect of ensuring services on the line are economically sustainable. In the next section we consider, and rebut, the rationale set out in Iarnród Éireann's submission to the NTA in support of its proposal to close passenger services on the line.

SECTION FIVE

REBUTTAL OF IARNRÓD ÉIREANN'S RATIONALE FOR ROSSLARE-WATERFORD RAIL LINE CLOSURE

5.0 REBUTTAL OF IARNRÓD ÉIREANN'S RATIONALE FOR ROSSLARE-WATERFORD RAIL LINE CLOSURE

5.1. Background

It is apparent and widely recognised that the Rosslare-Waterford route, and indeed the whole Rosslare-Limerick route, has been poorly performing in terms of passenger numbers in recent years. It is abundantly clear that the current rail service between Rosslare and Waterford, as it is currently configured, is not economic and is incapable of making a material contribution to the region's development objectives.

The 2009 'Report of the Special Group on Public Service Numbers and Expenditure Programmes' had the aim of identifying specific options for reducing current spending in the context of reduced Exchequer resources. One of its suggestions was that lightly-used rail lines should be closed and replaced with bus services. Closure fell short of being a recommendation, but the report recommended that the Limerick Junction to Rosslare line, together with two other rail lines, should be examined as part of a joint undertaking by Department of Transport and Córas Iompair Éireann (CIÉ), the owner of Iarnród Éireann, to "*review the application of PSO payments to low patronage transport routes and explore how such payments can be best targeted/applied to provide the most economical service levels that meet customer needs and demand patterns*".

Iarnród Éireann has prepared a 'Business Case for Withdrawal of Rail Services' dated July 2010, a copy of which we received on 12 July 2010. We have reviewed that business case in the light of our own analysis. We have identified a number of important shortcomings in Iarnród Éireann's business case which we consider make it an unsafe basis for the NTA to make its decision.

5.2. Overview of the Business Case

Iarnród Éireann's business case considers two alternative rail service options – closure, and "three round services between Waterford and Wellingtonbridge, one round service between Waterford and Wexford, [and] one service between Waterford and Wexford returning as a service between Rosslare and Waterford".

Iarnród Éireann's business case indicates that it follows the NTA's 'Social Impact Evaluation Methodology'. The structure of the business case follows the structure of that methodology.

Iarnród Éireann defines the service in question as the service between Waterford and Rosslare Europort, being a one round trip per day, Monday to Saturday. It identifies the target market as the Waterford City commuter market.

Iarnród Éireann defines the catchment market as a population of some 3,400 in 2006 residing in Rosslare and the settlements with stations along the rail corridor. It describes the population density as very low. Although it acknowledges that County Wexford is one of the fastest growing counties in the country, it notes that the growth has not generally affected the areas currently served by the Rosslare-Waterford line.

The business case notes that, while Waterford has been designated as a NSS Gateway, "*County Wexford's settlement hierarchy does not give 'primary' or 'secondary' growth area status to any of the urban centres served by the Waterford to Rosslare line*". It also notes that County Wexford's polycentric settlement strategy in its 2001 Development Plan "*was not entirely successful*".

It notes that economic deprivation is not a major issue in the area. In particular, it notes that there are three RAPID areas (areas targeted by the Government's 'Revitalising Areas by Planning Investment and Development' programme) in County Wexford (Wexford Town, Enniscorthy and New Ross) but that none of these are directly served by the line.

Iarnród Éireann's analysis of the key attractors for travel on the line focuses entirely on Waterford and notes that Waterford station is "*somewhat remote from the city centre*" and "*even more remote from a number of the other major key attractors in the city*".

Iarnród Éireann's business case analyses the 2006 census POWCAR data ('Place of Work - Census of Anonymised Records') and concludes that the "*total traffic market to work school and college*" into Waterford from South Wexford is between 266 and 860, depending on the definition of the catchment area. It notes that the census took place before the 2009 opening of the Waterford City by-pass.

The business case argues that the location of the Waterford railway station across the river from the city centre means that "the rail mode is at a clear competitive disadvantage relative to the car and bus modes". It

also identifies a number of road improvements that will help reduce bus times, although it acknowledges that the rail route is the most direct and the bus offers the least competitive journey times.

The business case value for money judgement focuses on the "*cost savings implications associated with complete closure of the rail service*". It identifies three components of savings, operational costs (primarily gate keepers, Barrow Bridge operators and signal men, totalling €1.1 million annually for the current service or €1.5 million for an enhanced level of service), regular annual maintenance of the infrastructure (totalling €0.7 million annually) and the future investment under the next phase of the rail safety programme (identified as €17.6 million in total, although it is not clear what impacts this investment might have on continuing operation and maintenance costs).

Its conclusion is that the cost benefit analysis of retaining the route shows negative Net Present Values, "*driven by very low levels of passenger movements*". It also notes that the CBA undertaken for the 2003 Strategic Rail Review also concluded that there would be a negative economic rate of return and that "*the major drain on the performance of the lines is the poorly performing passenger services*".

5.3. Shortcomings in Iarnród Éireann's Business Case

We have identified a number of substantive shortcomings in Iarnród Éireann's business case. These are as follows

- The business case considers a strictly limited range of two options. The principles of Better Regulation, which we describe in section 4.2 above, imply that careful analysis would need to be undertaken to identify the most promising and feasible options to ensure that the decision is fully evidence based. The business case appears to have limited its analysis to the existing service route and its target market without considering more widely how the railway line might be more advantageously used to address the substantially expanded market potential – in terms of population centres and reasons for travelling.
- The business case does not consider evidence from other more successful railway lines which would help indicate how services might be improved, and thus, what alternative options would be appropriate to analyse, and provide an evidence-basis for conclusions about levels of traffic that might reasonably be achievable on the line.
- The NTA's 'Social Impact Evaluation Methodology' that Iarnród Éireann has used to structure its business case makes it clear that "*It is not suitable for assessing the viability of, or to support, any case for any new or enhanced services*". It thus appears that the methodology is not a sound basis to consider any alternative options to closure that involve new or enhanced services. In this particular case, given the very low service level currently being provided, it is clear that considering such options should be integral to any evidence-based decision.
- Iarnród Éireann's identified target market, the Waterford City commuter market, is far too limited for an evidence-based case. Our own analysis in section 4.4 suggests the commuter market may be bigger going in the opposite direction. However, there are three more important issues.
    i) It would appear that the current timing of the return train would suit commuting students rather than commuting workers, an assessment which is reflected in Iarnród Éireann's own survey of passengers. It shows that, of 30 regular passengers (twice or more weekly, mostly daily), 24 were travelling to a school or college (mainly WIT or WCFE/CTI), and one travels for recreational purposes, leaving only 5 travelling to other work.
    ii) The experience of successful rural rail lines indicates that demand comes from many markets, individually small but which aggregate to sustainable levels of passenger traffic. The comparator rail lines we have studied show some commuter traffic but with services that are busy for much of the day, during the week and at weekends, with people travelling for diverse commuting, study, business, leisure, retail and social reasons.
    iii) Iarnród Éireann's analysis overlooks the potential market for travel to and from a far larger population and employment centre at the eastern end of the rail line than any that Iarnród Éireann has considered, Wexford Town. We have highlighted the economic linkages between Wexford Town and Waterford City identified in the NSS with Wexford designated as a Hub supporting Waterford's Gateway development and forming part of the strategic 'growth triangle'

with Kilkenny. The current difficulties/drawbacks with road travel between Waterford City and Wexford Town is due to the New Ross bridge bottleneck.

- Iarnród Éireann's quantitative analysis of the market relies on information it derived from the 2006 POWCAR data. It has interpreted these data as reflecting the "*total travel market to work, school and college*". However, the POWCAR user guide makes it clear that POWCAR only covers persons who at the time of the census were both 15 years old or over and indicated that their Present Principal Status was working for payment or profit. The 'place of work' data in POWCAR is based on replies to Questions 31 and 32 of the 2006 census: "What is (was) the full name of the Organisation you work(ed) for in your main job?" and "What is (was) the full address at which you actually work(ed)?"Therefore, Iarnród Éireann's analysis of its own targeted market appears to have entirely missed out the population of students that make up the substantial share of its regular passengers.
- Iarnród Éireann's characterisation of the catchment market appears to be especially narrow and, as noted above, disregards Wexford Town. Our analysis considers catchment areas on a consistent basis with analysis of comparator lines in England and Wales to develop an evidence base. Our analysis suggests that the population around the intermediate stations is not particularly low density compared with populations around the comparator lines. The relatively small sizes of Waterford and Wexford, in comparison with towns at the ends of comparator lines, should be offset by the strategic nature of the economic relationships between a Hub and a Gateway.
- Iarnród Éireann's understates the policy relevance of the populations that are served by or could be served by the line. It has overlooked the relevance of the Hub status of Wexford, its population and employment base and its relationship with Waterford as a designated Gateway. It inappropriately focuses on the absence of primary or secondary growth areas in small settlements while overlooking the policy significance of County Wexford's designated strategic growth centres. Iarnród Éireann's dismissal of the County's polycentric settlement strategy is too superficial to be taken seriously.
- It dismisses the relevance of Wexford's status as a RAPID area noting that economic deprivation is not a major issue in the area. In particular, it notes that there are three RAPID areas (areas targeted by the Government's 'Revitalising Areas by Planning Investment and Development' programme) in County Wexford (Wexford Town, Enniscorthy and New Ross) but that none of these are directly served by the line.
- Iarnród Éireann's analysis of the key attractors for travel is too narrowly focused on Waterford. It disregards any other destination that might be served by the line, including Wexford Town. Even considering Waterford in isolation, Iarnród Éireann have not analysed the relevance of its observation that Waterford station is across the river from the city centre or the scope for the issue to be mitigated by appropriately integrated local transport options. We note that the distribution of attractors around the city (e.g. Waterford Institute of Technology, Waterford Regional Hospital or Waterford Airport) would have similar implications for integrated local transport for the replacement bus service. Our own analysis indicates the substantial share of relevant employment is within 2 kilometres of the station.
- The business case value for money judgement implicitly assumes that the entirety of the costs attributed to the line would be saved as a result of closing the passenger service. A commonly held view in the industry, and one expressed in the UK's Strategic Rail Authority's original strategy for community rail, is that *"closures leave huge residual liabilities . . . with limited cost savings achievable*". We note that the letter dated 7 July from the Chief Executive of Iarnród Éireann, Richard Fearn, to the Minister of State for Sustainable Transport, Ciarán Cuffe T.D., indicates that the company will continue to maintain the route to preserve the rail alignments for future use as and when there is sufficient passenger and/or freight demand for it. CIÉ does not appear to have factored in these costs into its analysis.

5.4. Conclusion on Iarnród Éireann Business Case

Iarnród Éireann's business case recognises that its conclusions are "*driven by very low levels of passenger movements*" and that "*the major drain on the performance of the lines is the poorly performing passenger services*". Crucially, it has not carried out a coherent analysis of how those deficiencies might be addressed to identify the route's true potential and identify how it might achieve that potential. Its analysis is flawed in a number of substantive respects and we consider that it does not provide a safe evidence basis for the NTA's decision to approve the application for closure of the rail line.

SECTION SIX

SUMMARY AND RECOMMENDATIONS

6.0 SUMMARY AND RECOMMENDATIONS

6.1. Summary

The Rosslare–Limerick Junction Railway line is potentially valuable infrastructure for the region's development objectives but which is currently severely under-used. The whole line has been identified as under-performing and for that reason earmarked for possible closure by, for example, the 2009 'Report of the Special Group on Public Service Numbers and Expenditure Programmes'. The nation's financial resources are under considerable pressure at this time and an under-performing rail line is a natural candidate for closure in order to help reduce losses on the rail network.

Iarnród Éireann has announced its intention to terminate passenger services on the Rosslare-Waterford section of the line and, have set out their business case for doing so. However, the decision to terminate is subject to approval by the National Transport Authority (NTA). The NTA has invited a submission from the South-East Regional Authority and others to inform its decision. This report has been commissioned by the South-East Regional Authority, the Mid-West Regional Authority and their constituent local authorities to form part of that submission.

The project team, namely KSA, Imrecon and Fisher Associates, has carried out a comprehensive analysis of the complete Rosslare-Waterford-Limerick rail corridor, an in-depth review of all of the relevant policy context, considered the socio-economic and business case for an alternative strategy to address the performance issues and reviewed the business case submitted by Iarnród Éireann to the NTA.

The submission findings have far reaching implications for the future of the Rosslare to Limerick Junction line and for public transport provision in the region.

The project team has identified a number of fundamental shortcomings in the Iarnród Éireann business case for terminating passenger services on the Rosslare-Waterford line. We consider these shortcomings render the business case an unsafe basis for the NTA decision or, indeed, the decision by Córas Iompair Éireann that is required under the Transport Act, 1958.

The analysis develops a quantitative estimate of the potential of the line to attract passenger traffic between key population and employment centres of Waterford and Wexford. These are designated respectively as a Gateway and Hub and, with Kilkenny City, form part of a strategic 'growth triangle' with a critical mass of population to drive development in the South-East region. With reference to experience in the UK, our analysis indicates that the critical mass and the natural economic linkages between the two centres mean that properly structured rail services should generate substantially higher levels of traffic than supposed by Iarnród Éireann.

To identify the potential of the line, we have carried out comparative analysis with four rural rail lines in England and Wales which are considered reasonably successful. Our analysis indicates that the Rosslare-Waterford line should, if Wexford Town is integrated into the service and the service is made substantially more frequent, become dramatically more attractive for the travelling public. It should generate levels of traffic that will make the line economically sustainable while achieving benefits in terms of reduced congestion, better access for disadvantaged people and closer economic ties between the population and employment centres of the South-East's strategic 'growth triangle'.

Our quantitative analysis is backed up by our qualitative review of the policy landscape, including the implications of more recent financial constraints.

We recognise, as do the agencies rating Irish Government bonds, that there must be a balance between reducing debt levels on the one hand and maintaining Ireland's demonstrated adjustment capability and its economic vitality (which support the bond ratings) on the other. Our review identifies that the potential for the line directly and we believe demonstrably addresses the policy objectives and policy framework for polycentric development that is integral to Ireland's economic vitality.

Importantly, the necessary improvements in service frequency do not depend on any substantial improvements to the infrastructure and require only rolling stock that would be justified by the potential levels of traffic. Rail is characterised by fixed costs which means that the optimum strategy for a rail line is generally to maximise the use of existing infrastructure. That strategy has not been tried on this line and our analysis suggests that it would generate disproportionately positive economic benefits for the region.

However, we have identified an important condition for successful development of the line. We are informed by the experience in the UK that shows that successful development of rural lines requires a local focus. The

national train and rail operator is necessarily primarily focused on its core national network and cannot reasonably be expected to deliver the focus, energy and ideas that are so important for successful development of lines that are secondary to the core network. These are community rail lines. Over the last decade in the UK, the strategy for community rail lines has recognised the important role that Community Rail Partnerships can play and there are now abundant examples of thriving partnerships. We believe successful development of services on the Rosslare-Waterford line, and by extension the Rosslare-Waterford-Limerick Junction line, will depend on a similar kind of Community Rail Partnership being established for the line. There is a wealth of experience that Ireland could draw on, and in our discussions with CRP people it is evident that there is real interest in helping to transfer that experience to Ireland.

6.2. Recommendations

The project team have undertaken comprehensive analysis over the course of this study and the following are the key recommendations put forward by the study team that should be given due consideration:

- **The NTA should not approve the proposal to terminate passenger services on the Rosslare-Waterford line**. Our analysis highlights important weaknesses in the business case presented by Iarnród Éireann for the proposal which render it an unsafe basis for a decision of this importance to the region, especially in the light of EU, national, regional and local policy objectives, strategies and directives. The analysis instead indicates that the value of the infrastructure would be maximised under an alternative strategy of providing a sustainable, frequent service that is capable of attracting passenger traffic from the key markets for public transport in the region.
- **The passenger services on the Rosslare-Waterford rail line should incorporate the urban centre of Wexford.** The analysis carried out as part of this study suggests that the demographic and policy logic is for the Rosslare-Waterford line to service a wider market incorporating Wexford Town and reflecting two-way flows. It would link two county capitals, a designated Gateway and a designated Hub, two significant employment centres each employing in excess of 10,000 people and a major passenger ferry gateway at Rosslare (owned and operated by IE) and another port principally serving freight customers at Waterford and with further rail links across southern Ireland and to the Western Rail Corridor. With interconnecting local transport, it would also enhance links with a thriving airport just south of Waterford.
- **To optimise the economics of the line, passenger services between Wexford/Rosslare and Waterford should be substantially more frequent.** Increasing frequency is the principal factor that makes rail services more attractive for passengers and, because of the relevance of fixed costs, more economic for operators. It has been the experience of rail lines in Ireland, the UK and elsewhere that increasing service frequency can increase patronage very significantly, thereby securing the strategic value of the line. We have outlined an approach based on a two-hourly service in both directions that we believe would be appropriate. This would require some augmentation of the rolling stock used on the line, which should be justified by the levels of traffic.
- **The relevant regional and local authorities and Iarnród Éireann should be directed or encouraged strongly to develop a Community Rail Partnership (CRP) approach, initially for Wexford/Rosslare-Waterford services.** The prospects for the Rosslare-Waterford-Limerick Junction line are highly positive for the region, for the nation and for the rail network, but they are dependent on a local focus for marketing and service development. Drawing in particular from the experience in the UK of its community rail development strategy, a CRP approach would have major advantages for the region and for Iarnród Éireann. The main focus of CRPs is local, small scale and changing the way people think about the railway, but with a big cumulative impact on the relationship between the railway and the communities it serves. Real commitment from both Iarnród Éireann and local organisations would be necessary, but it would address directly the cause of service failures and decline and the benefits would be disproportionately positive.
- **As part of CRP-led market development, there should be a refocused approach to service development, both for rail services and interconnecting transport services such as local bus services.** A locally focused approach to service development would be directed to meeting the needs of local people and visitors to the region, making sure that public transport as a whole provides integrated services that people want to use and that local businesses can benefit from.

- **The potential for freight should be developed.** This study has identified a potential on the Rosslare-Waterford section of the Rosslare-Waterford-Limerick rail line which could be of significant importance for freight business. Given this potential, a detailed assessment (beyond the scope of this submission) to investigate the opportunities for freight business along this section of the line, is certainly warranted and recommended.

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APPENDIX A

THE PROSPECT FOR FREIGHT

APPENDIX A – THE PROSPECT FOR FREIGHT

Introduction

The proportion of freight being carried on rail in Ireland is substantially lower than in most other European countries; this may always have been the case because of the shorter distances involved, but it has also declined over the last decade or so. In 1997, 6.9% of inland freight in Ireland was carried by rail, but by 2008 this had fallen to 0.6%. This is in a period when the share of rail freight in the UK has increased slightly from 9.1% to 11.5% (13.7% in 2006)[9].

This decline is partly attributable to Iarnród Éireann (IE) ceasing its general freight service in 2005. Iarnród Éireann is the only company which operates rail freight services in Ireland, but since 2005, it has restricted this service to full trains which are chartered by its customers. There is no third party access to the railway network, so the volume being carried today is limited. However, the volume had been steadily declining over the period of this data and had already fallen to below 3% by 2002.

In volume terms, the tonnage carried by rail in Ireland has fallen from 2.14m tonnes in 2004 to 0.72m tonnes in 20081. Extrapolating from the volume of goods transported by road in 1997 of 53.6m tonnes[10], the figure for rail could have been around 4m tonnes in that year.

Rail freight is becoming a topical issue throughout Europe as governments look for ways to reduce their CO2 emissions and companies are faced with growing pressures to keep costs down, at a time when fuel prices are rising, as well as raising their 'green' credentials. Ireland is no exception in flagging the need to reduce emissions in the transport sector; in 2009 the government noted that "At present 95% of all goods are moved by road and over 30% of transport greenhouse gas emissions are from the freight sector"[11]. The potential for transporting freight by rail was not, however, specifically addressed although it was noted that "more research needs to be done on the freight sector before deciding on the best approach".

Rail can play a positive role in the low carbon economy. The UK Freight on Rail group has estimated that moving freight by rail produces 70% less CO2 than the equivalent road journey[12].

It has been difficult in the absence of a fully operating Irish rail freight service to produce forecasts of the volume of traffic that could be carried on the Rosslare – Waterford – Limerick line. Our approach has therefore been to interview key potential customers to gain an understanding of the issues being faced; what influences their transport decisions; what would need to change on the railways to make rail transport an attractive proposition and, if the service met their needs, what sort of tonnage they would be likely to put on rail. We also look at the volume of freight passing through the ports of Waterford and Rosslare, although without knowing more detail of what it is and its final destination, it is not possible to estimate a proportion that might switch to rail.

Potential Customers

Celtic Linen Ltd.

Celtic Linen Ltd. is one of the largest suppliers of linen and garment rental services in Ireland; it provides linen services to the healthcare sector, restaurants and hotels and industry supplying and laundering bed linen, towels, table linen, work clothes, dust control mats and so on. It has 5,000 customers in Ireland and a transport fleet of 65 vehicles.

The company operates a large centralised laundry at Drinagh, 3km south of Wexford Town, and depots located at Tallaght, Cork, Carlow and Ballinasloe. It distributes to its 5,000 customers from all five locations using its fleet of 65 trucks, and can process 540 tonnes of linen and garments a week.

The company aims to reduce its CO2 emissions to 'negligible' levels by 2020 and, as transport accounts for 17% of its carbon footprint, it wishes to move its trucking operation to rail where possible. Director, Peter Scallan, has made a submission to SERA in which he outlines his requirements and the likely level of traffic.

[9] Source: Eurostat, Modal split of freight transport; Railways 1997-2008.
[10] CSO, Road Freight Transport Survey 1995-2001.
[11] Department of Transport, Smarter Travel. A Sustainable Transport Future (2009).
[12] www.freightonrail.org.uk

The elements relating to the Rosslare-Waterford-Limerick section are as follows:

- Between Wexford – Cork – Wexford:

  10 TEU[13] per night, Monday to Friday, April to October

  12 TEU per night, Monday to Saturday, November to March

- Between Wexford – Co. Galway – Wexford:

  8 TEU per night, Monday to Saturday, May to September

  8 TEU per night, Monday, Wednesday and Friday, October to April

Note: whether the latter would use the Rosslare-Waterford-Limerick line or not depends on the rail routing; if it were via Dublin, then the goods would not use the Rosslare-Waterford-Limerick section.

Access to the railway network for Celtic's main processing plant at Drinagh would be well-served by the disused rail station at Killinick which is close to the Rosslare-Limerick line. This station is adjacent to the N25 and there would be no traffic congestion between there and Drinagh.

Apart from access to the network, Celtic faces a problem under the current rail freight regime in that it could not provide full trainloads. The combined freight to Cork and Co. Galway would be 18 TEU or 9 x 40' containers a night, whereas a full train carries 18 x 40' containers. It would therefore need to be combined with other companies' goods. There may also be an issue with reticence by IE to operate night trains.

Coillte

Coillte is the State forestry company. Its core purpose is the commercial management of the State's forests, but it has developed into a European scale forestry and forest products business involved not only in the sale of logs, but production of panel products and providing support for renewable energy schemes and sites for telecommunications.

Coillte currently transports logs by rail to Waterford. The company is responsible for cleaning the rolling stock and IE provides the drivers and schedules the services. At present it is chartering three 12-wagon trains a week, although it could currently increase this to five. Conversely, last year it could have managed without using rail at all, but kept it on so as not to jeopardise the provision for future years.

Handling is a key issue for logs; they are a relatively cheap product and the handling cost is quite high, so it is only viable to transport them by rail over distances of 100 miles or more. Coillte does not have a branch line connecting its Waterford plant to the main network, so logs have to be transferred to road incurring additional handling costs, but they have estimated that they would need to handle 500,000 tonnes a year to make it worthwhile installing a branch line. The company uses lorry-based cranes to load logs onto the trains. This is slower than using a land crane, but they cannot afford to have a crane sitting on site for a small number of trainloads a week.

Obviously, if logs are loaded onto road trucks, they do not need to be handled again. As a possible compromise, Coillte is looking into using trailers to reduce the amount of handling; the logs would be loaded onto a trailer in the forest and could stay on the trailer on/off the train. The payload that could be carried would be 5-6 tonnes less because of the weight of the trailer, but the reduction in handling costs could offset this.

The rail service as currently operated, however, comes under criticism by Coillte on the following grounds:

- Passenger services always take priority over freight service. If a locomotive is out of action, or they are short of drivers, then IE will pull them off the freight service. This can cause delays measured in days not hours.
- Although a full train can take 12 wagons, some of the sidings can only accommodate 10 wagons, which is a problem when a freight train has to let a passenger train pass.
- Coillte has suggested that their freight trains are run at night, but IE does not seem to be able to get drivers to work night shifts.
- Trains cannot be chartered at short notice, so there is very little flexibility or responsiveness in the service.

[13] TEU - twenty foot equivalent unit.

Coca Cola

One of the Coca Cola companies is currently building a manufacturing plant in Wexford (adjacent to Celtic Linen) and could provide cargo for intermodal trains running from there to Ballina where their main facility is located.

At present, because there is no rail link between Claremorris and Athenry, the trains have to move via Athlone and Kildare down to Waterford, but the restoration of that link, which has been recently confirmed by the Transport Minister and could be completed in the next year, would enable traffic to be routed via Limerick thus avoiding the crowded Dublin area.

Kent Stainless

The company is a leading manufacturer of bespoke and own design stainless steel products for the pharmaceutical, construction, healthcare and food industries, based in Wexford. They have used rail occasionally in the past, although mostly to Dublin. One problem that they face with using rail is that their goods are often on Europallets, as a result, they favour using Interlink or The Pallet Network.

Biostór

Biostór is involved in the storage and distribution of biological materials and brings in the equivalent of about eight container loads a month into Rosslare. These are transferred onto trucks because there are not the facilities at the port to put them directly onto rail. Biostór operates throughout Europe and, until two years ago, transported goods from Italy to Holyhead using rail and transport between Italy and Germany is by rail, so the company does not have an aversion to using rail, although much of its freight travels in smaller batches more suited to road transport.

Irish Cement

Irish Cement has a works in Limerick and a bulk depot in Waterford. Their silo at Limerick can despatch 10,000 tonnes on the road and rail network and it is understood that they charter a number of trains a week.

Other possible customers include[14]:

Diageo – the company wishes to move 4m kegs by rail within Ireland.

Fyffes, IWT, Bulmers and Atlantic Industries are also ready to use rail for freight if services are available.

These companies have apparently been trying to persuade IE to provide freight services, even offering to guarantee payment for full train loads, but have met with reluctance on the part of the rail company, which may partly be a result of the need for it to guarantee that freight trains will not take second place to passenger trains.

Port traffic

There are two major ports in the study region: Rosslare and Waterford.

Rosslare Europort is the hub for RoRo passenger and freight services operating on the southern Irish Sea and continental European routes. It has seen the volume of freight increase by an average of 2.9% per annum between 1999 and 2009, although the impact of the recession has been felt as annual growth to 2007 was over 5% per annum[15]. There used to be a railway station at Rosslare, but this is no longer used.

The Port of Waterford handles LoLo freight, bulks (dry and liquid) and general cargoes/breakbulk. The Belview area of the port has direct rail spurs to the main rail network and has the capacity to increase the volume of goods it handles.

[14] James Nix, Unlocking the Potential of Rail Freight in Ireland, Irish Environment Network.
[15] Rosslare Europort, Traffic volumes 1999-2009.

The table below shows the volume of goods by type using the ports in 2009:

Total goods handled ('000 tonnes)	Roll-on/ Roll-off	Lift-on/ Lift-off	Liquid bulk	Dry bulk	Break Bulk and all other goods	Total
Rosslare	2,328					2,328
Waterford		902	17	640	72	1,631

Source: CSO Statistics of Port Traffic, 6 July 2010

The table below shows the breakdown of RoRo traffic at Rosslare in 2009:

	No. vehicles	'000 tonnes
Passenger cars, motorcycles, accompanied trailers	290,814	
Passenger buses	2,893	
Trade vehicles	8,234	10
Freight vehicles/trailers		
- loaded	127,661	2,318
- unloaded	6,670	
Total	436,272	2,328

Source: CSO Statistics of Port Traffic, 6 July 2010

Waterford has invested in rail lines under gantries which enables it to provide a rail freight service for DFDS (formerly Norfolk Line). When IE withdrew from the rail container business, DFDS made an arrangement under which IE owns the rolling stock provides trains and crews and manages access to the network; the Port of Waterford provides and manages the terminal; and DFDS handles the logistics. IE is guaranteed a trainload and DFDS bears all the risk of filling it, but can offer its customers a partial rail service. In 2006, DFDS began operating two return trips per week between Waterford and Ballina in Co. Mayo, and this was increased to three in 2008.

Issues

Previous work has identified a number of key issues relating to the establishment of freight services on the Irish railways. We summarise their findings with our own conclusions below:

- There are policy barriers relating to the non-separation of passenger and freight operations from track operations which make it difficult to determine charges for third party access to rail infrastructure. As a result, Iarnród Éireann is the only company operating freight services and there is therefore no alternative or incentive and no competition.
- Iarnród Éireann will only operate full-train loads, so only those individual companies transporting large consignments can use rail economically. Logistics companies would need to ensure that their customer base is large enough to combine shipments into full train loads.
- As a result, there has been no need to retain marshalling yards for shunting wagons to make up full trains; although Waterford (along with Dublin, Ballina and Westport) does still have a marshalling yard.
- Customer railheads no longer exist, which has an impact on handling costs.
- Investment would need to be made in rolling stock, and probably in stations to enable convenient access to the network for freight.

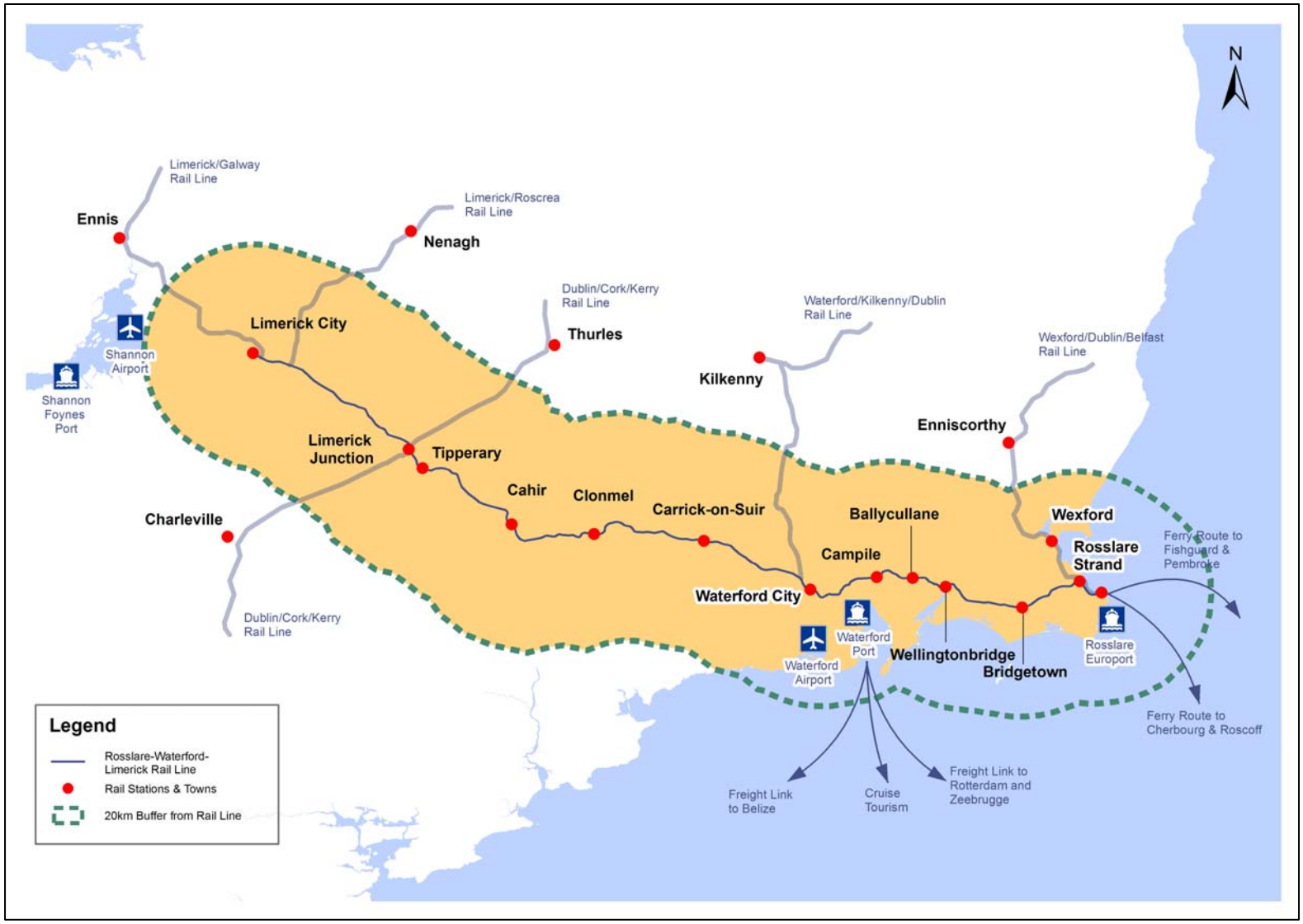
- The service has to be more flexible and customer-friendly. Freight needs to be delivered on-time and the service has to be reliable. Delays are no longer tolerated as they cause problems for production processes and final customers. This means that freight services have to be given equal priority to passenger services. Where there may be congestion issues, night-time services are a feasible option and one which may be preferred by the customers.
- Rail freight is unlikely to be competitive over short distances, although the establishment of distribution centres can help. The economics of rail haulage depend on many factors including the value of the goods, the location of sources of supply and customers, timing of services, road congestion, port congestion and freight rates.

These issues are not unique to the Rosslare-Waterford-Limerick railway line, and the future of rail freight is something which needs to be addressed nationally. In addition to the issues raised above, there will need to be investment in the network and rolling stock. The Government's decision to reinstate the Claremorris to Athenry line will, however, increase the strategic role that the Rosslare-Waterford-Limerick line can play through relieving congestion in the Dublin area and giving greater flexibility in routings and hence reliability of services.

APPENDIX B

ILLUSTRATIVE MAPS

APPENDIX B – ILLUSTRATIVE MAPS

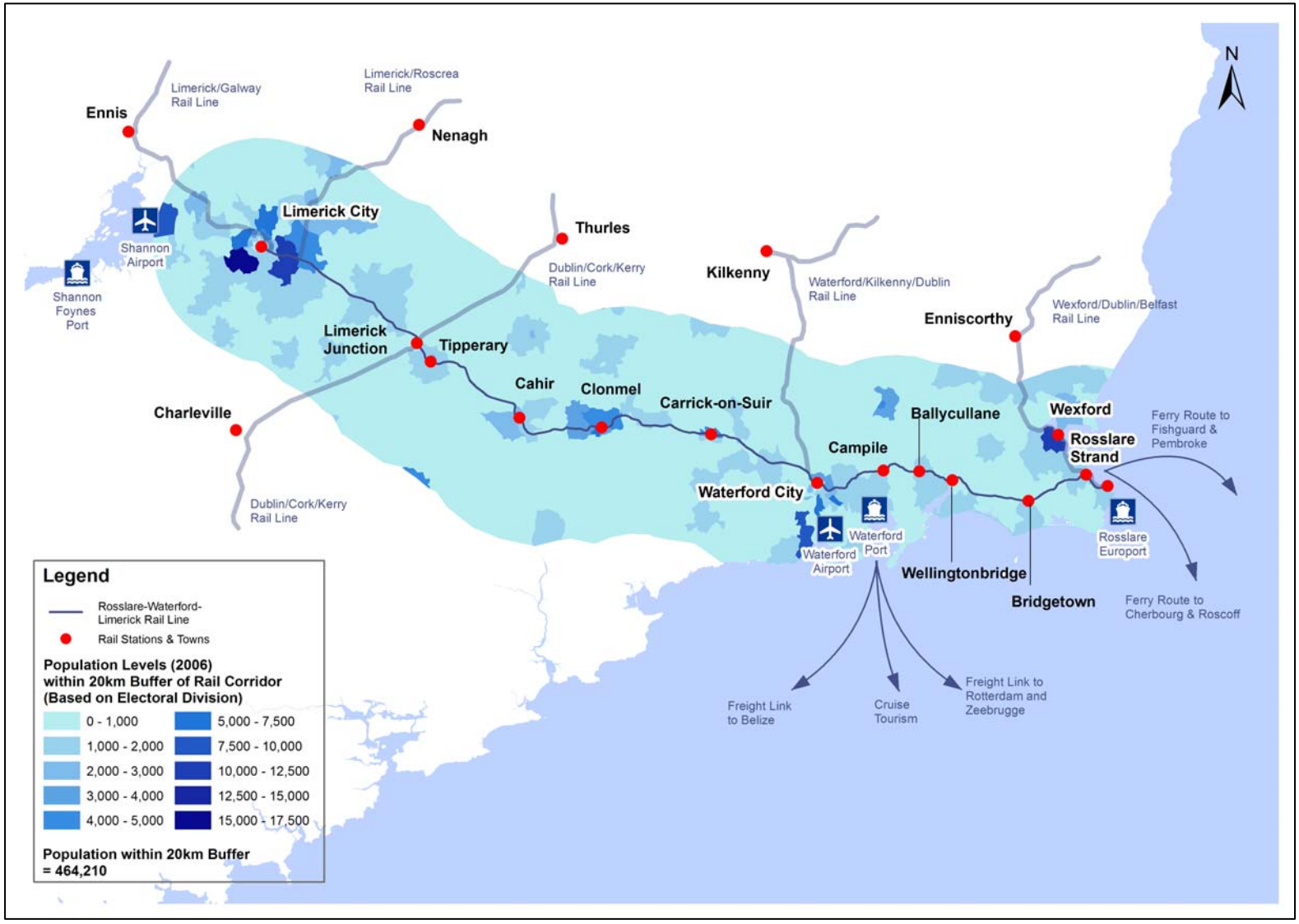


Rosslare-Waterford-Limerick Rail Line 20km Catchment Buffer

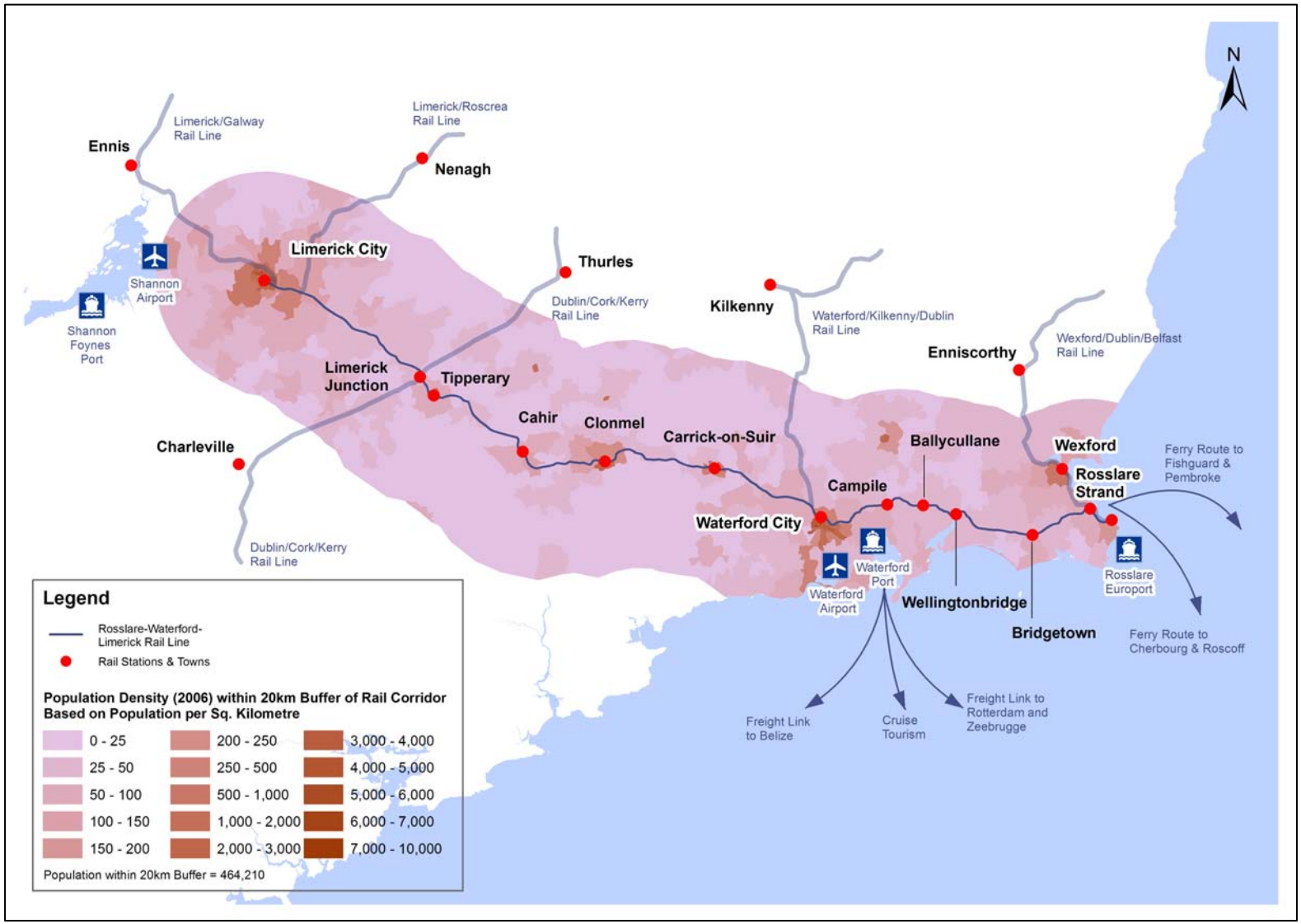
Rosslare-Waterford Rail Line 20km Catchment Buffer

Rosslare-Waterford-Limerick Rail Line 10km Catchment Buffer

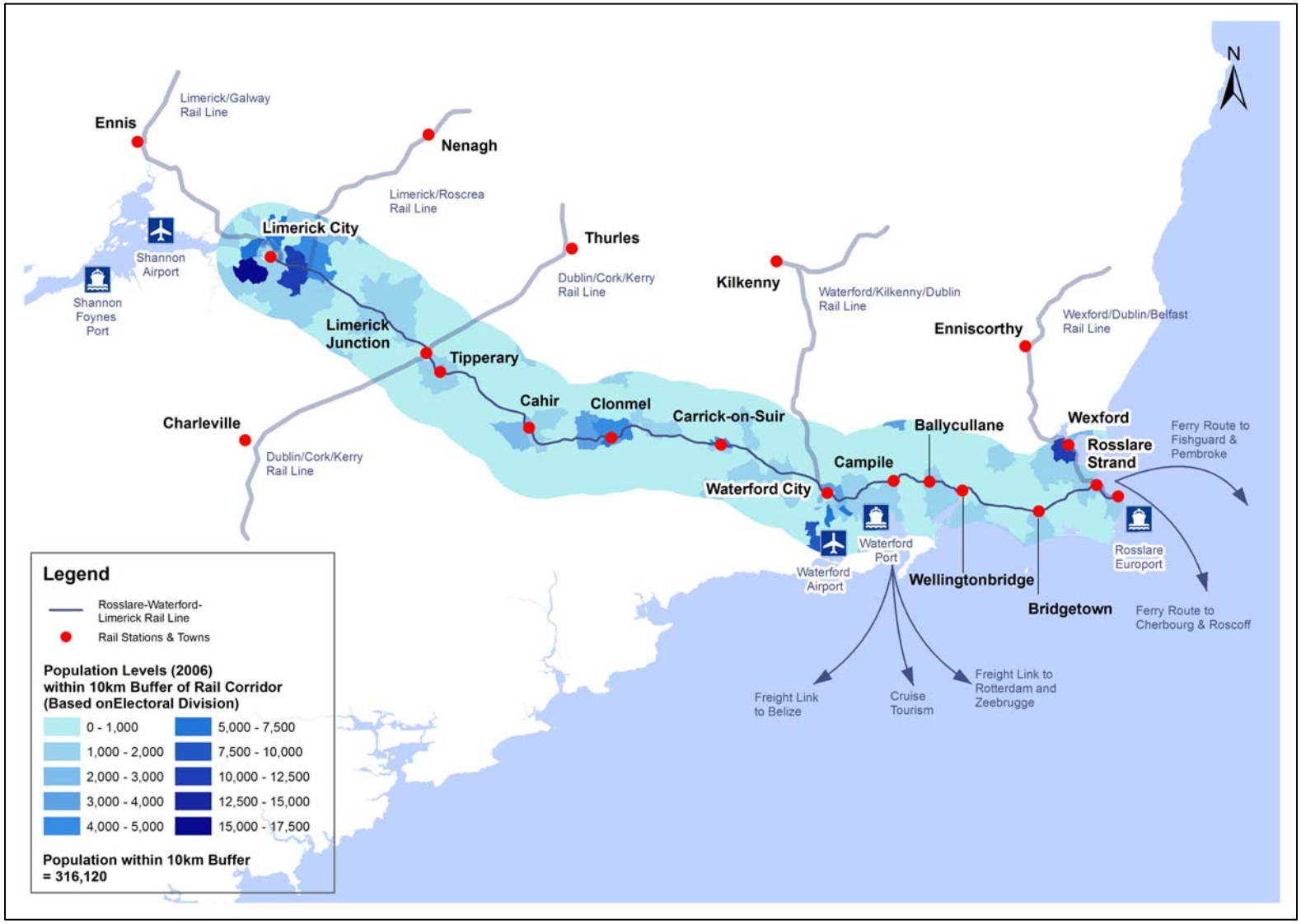
Rosslare-Waterford Rail Line 10km Catchment Buffer



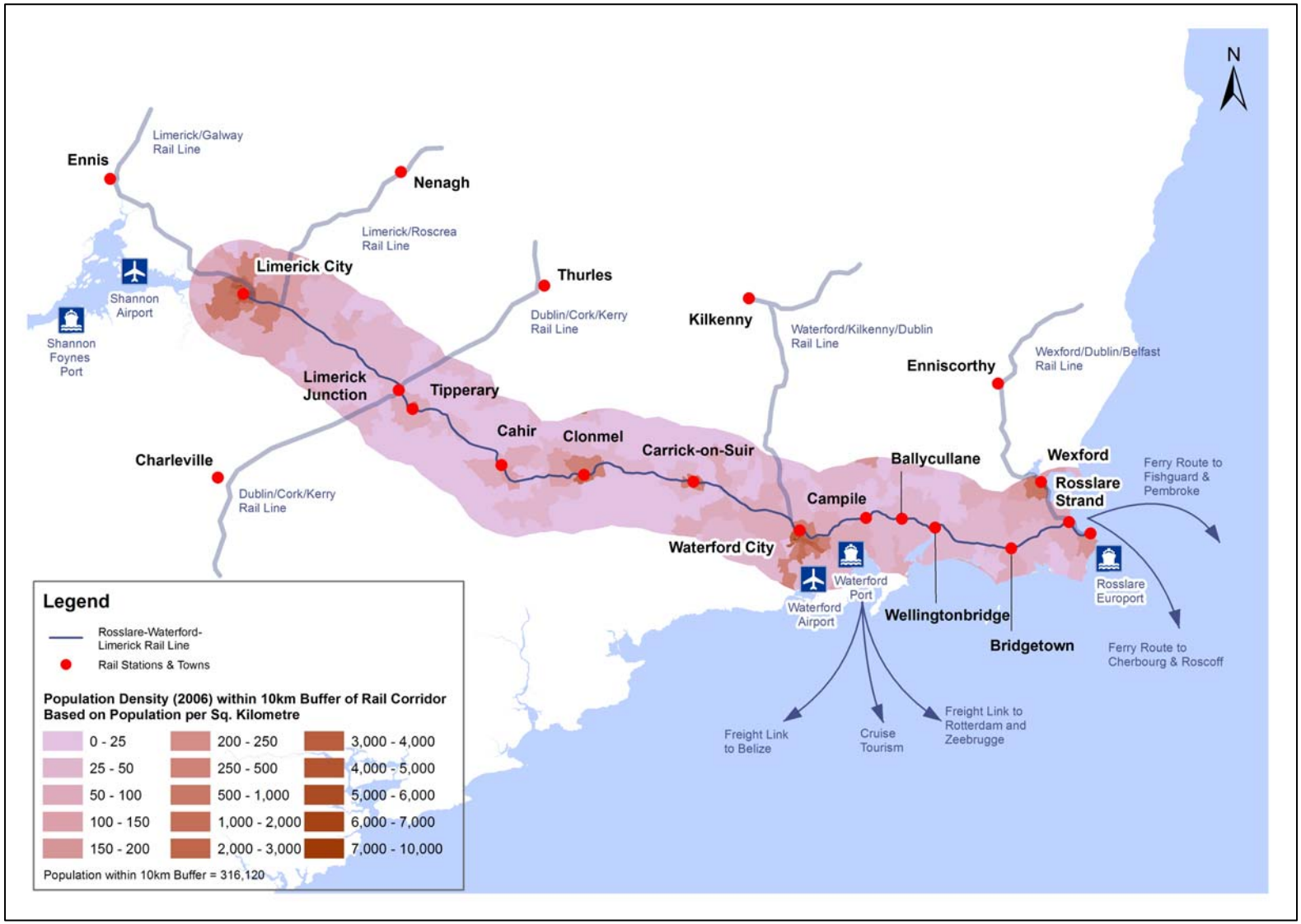
Rosslare-Waterford-Limerick Population Levels (2006) within 20km Catchment Buffer



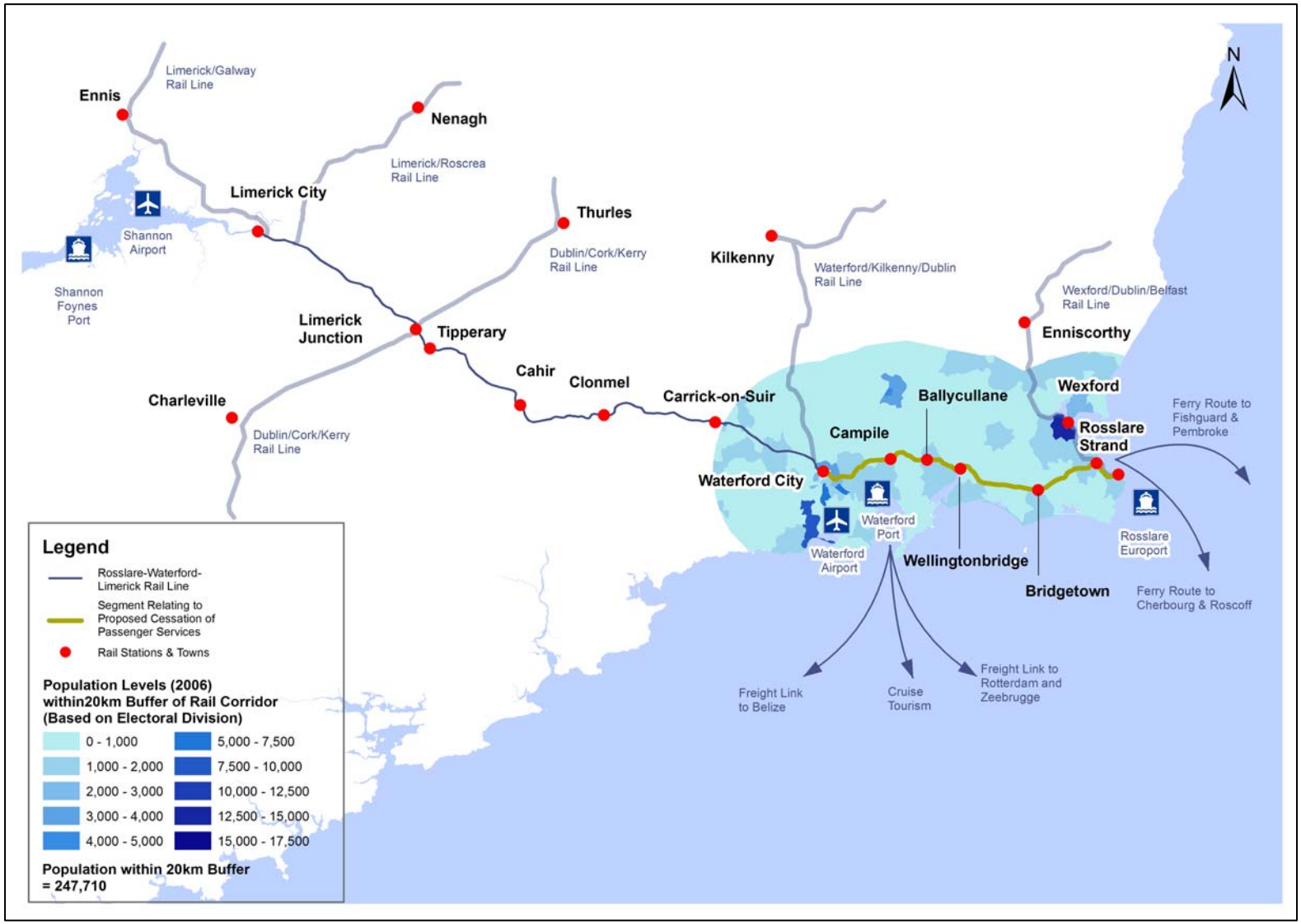
Rosslare-Waterford-Limerick Population Densities (2006) within 20km Catchment Buffer



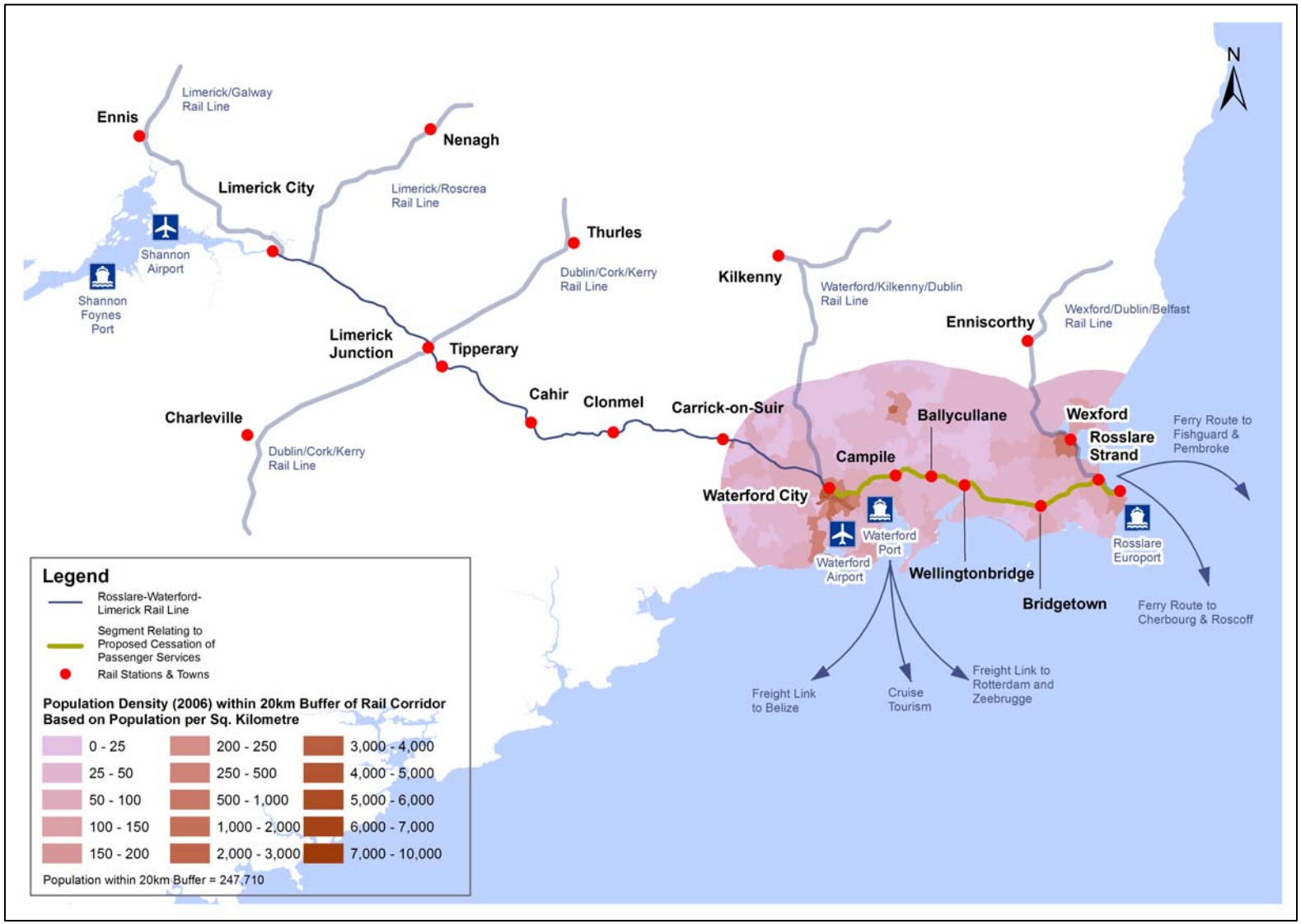
Rosslare-Waterford-Limerick Population Levels (2006) within 10km Catchment Buffer



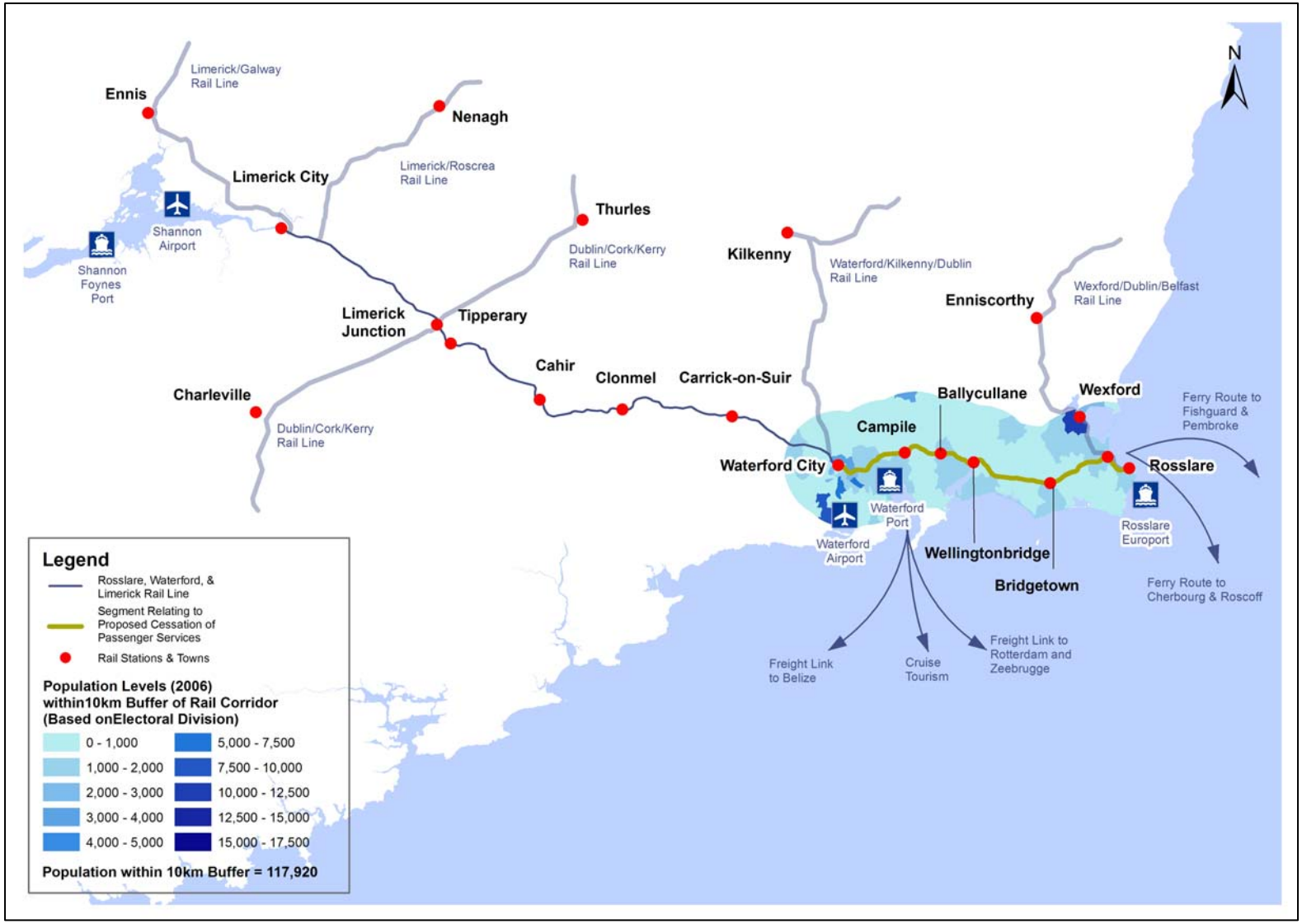
Rosslare-Waterford-Limerick Population Densities (2006) within 10km Catchment Buffer



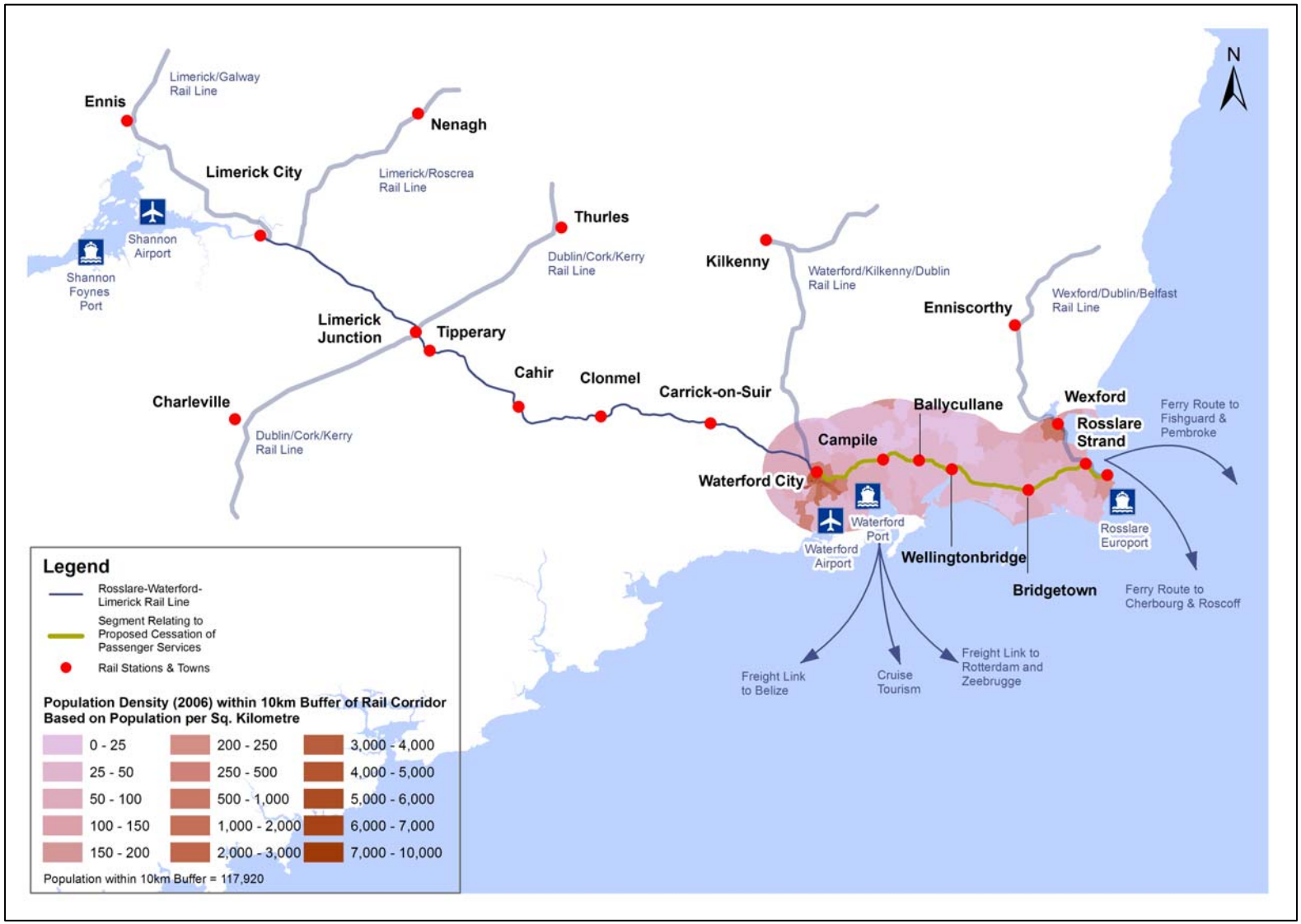
Rosslare-Waterford Population Levels (2006) within 20km Catchment Buffer



Rosslare-Waterford Population Densities (2006) within 20km Catchment Buffer



Rosslare-Waterford Population Levels (2006) within 10km Catchment Buffer



Rosslare-Waterford Population Densities (2006) within 10km Catchment Buffer

Proposed Settlement Strategy Designations for Settlement Centres within 10km Catchment Buffer of Rosslare-Waterford-Limerick Rail Line