

# ANALYSIS OF PUBLIC SECTOR CONSTRUCTION IN IRELAND

## Q1 2018 TO Q3 2020

A review of investment activity from the launch of the National Development Plan in 2018 to the end of Q3 2020.



Inside

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General Contracting

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Civil & Infrastructural

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Residential





“There is a strong consensus and an extensive evidence base that efficient public capital investment is central to economic growth strategy – described as the “wheels if not the engine”

(World Bank, 1994).

Economic theory and empirical research have shown that public investment can promote output growth, both in the short-run by increasing aggregate demand and in the long run by raising productivity and capacity.

Review of the Capital Plan  
2016 – 2021  
– Building on Recovery

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## Report Remit

The Construction Industry Federation (CIF) asked CIS to prepare a report on the status of public sector construction activity since the launch of the National Development Plan in early 2018.

The agreed proposal is outlined below with notes where applicable on delivery.

- Time Frame: 2018 – March 2020  
*CIS has extended the time frame to the end of Q3 2020 as the initial proposal was not agreed until late August.*
- Scope:
  - Public Sector construction projects valued at over €1m
  - Pipeline, active and completed construction
- Analysis by region, sector, stage, and funding source  
*Analysis is provided within the PDF report and also within an interactive Power BI report accompanying the PDF report.*
  - High level dashboard of main findings  
*within PDF and interactive report*
  - Public Capital Expenditure allocations and allocations under the National Development plan  
*within the PDF report*
  - Interactive map of projects  
*To be provide depending on platform available within CIF*
  - Project Data underpinning research and analysis  
*Available within Power BI report*
- Interactive report allowing interrogation of data
  - Primary Sectors:
    - Civil and Infrastructure
    - General Contracting (Non-Residential)
    - Residential
  - Stages:
    - Pipeline
    - Active (under construction)
    - Delivered (projects completed)
  - Analysis by above including:
    - Project Values
    - Project Volumes
    - Regions (EU NUTS Regions and county)
    - Floor Areas
    - Residential Units
    - Sector specific metrics
- Listing of Key Projects  
*withing PDF report and interactive report.*
- Methodology  
*within PDF report*

## Background

“Achieving sustainable economic growth and development across Ireland’s regions over the medium to long term is essential for the overall social and economic fabric of the country.”<sup>1</sup>

Under Project Ireland 2040 the National Planning Framework (NPF) set out the blueprint for spatial planning in Ireland to 2040. To secure the realisation of the ten National Strategic Outcomes in the NPF (see figure 3), the National Development Plan (2018-2027) was published in 2018 which identified the strategic priorities for public capital investment and provided a guide for national, regional and local planning decisions over the period of the plan.

The initial programme of investment set out in the NDP (€116bn over 10 years) was underpinned by multi-annual Exchequer capital allocations covering the period 2018-2022:

Departmental Capital Allocations 2018-2022	2018	2019	2020	2021	2022
<b>Ministerial Vote Group</b>	<b>(€ million)</b>				
Agriculture, Food & the Marine	248	255	258	265	275
Business, Enterprise, & Innovation	555	620	630	640	715
Children & Youth Affairs	28	32	31	32	33
Communications, Climate Action & Environment	209	256	297	317	400
Culture, Heritage and the Gaeltacht	54	75	76	80	110
Defence	77	106	113	120	125
Education and Skills	745	941	942	1,006	1,100
Employment Affairs and Social Protection	10	14	15	16	17
Finance Group	26	25	22	18	19
Foreign Affairs and Trade Group	13	17	13	13	14
Health Group	493	667	724	780	825
Housing, Planning & Local Government *	1,631	2,033	2,079	2,209	2,280
Justice Group	145	241	230	208	216
PER Group	174	203	214	223	232
Rural and Community Development **	88	141	150	152	175
Transport, Tourism, & Sport	1,327	1,643	2,058	2,526	2,405
<b>Sum Total</b>	<b>5,823</b>	<b>7,269</b>	<b>7,852</b>	<b>8,605</b>	<b>8,941</b>

FIGURE 1 PROJECT IRELAND 2040 | EXCHEQUER CAPITAL ALLOCATIONS 2018-2022

The investment plans cover a wide geographic and sectoral scope. The level of investment has increased year on year from 2018 on the back of a positive economic backdrop (up to the onset of the Covid-19 pandemic in March 2020<sup>2</sup>). The figures below illustrate this increased investment.

Year	2018	2019	2020	2021	2022
Allocation (€bn)	5.9	7.3	8.2	9.2	9.3
YoY % Change		24%	12%	12%	1%

FIGURE 2 EXCHEQUER ALLOCATION CHANGES

<sup>1</sup> Review of the Capital Plan 2016 - 2021

<sup>2</sup> In July 2020 the government announced a €7.4bn stimulus package to offset the impact of the pandemic.

## PUBLIC SECTOR CONSTRUCTION ACTIVITY IN IRELAND Q1 2018-Q3 2020

Below, Figure 3 shows indicative resource allocations for the National Strategic Outcomes for the period 2018 to 2027.

National Strategic Outcomes and their related investment priorities	Allocation € billion
<b>1. Compact Growth</b>	<b>14.5</b>
of which: Social Housing Provision	11.6
Urban Regeneration and Development Fund	2.0
<b>2. Enhanced Regional Accessibility</b>	<b>7.3</b>
of which: M20 Cork to Limerick	0.9
National Roads	5.7
<b>3. Strengthened Rural Economies and Communities</b>	<b>8.8</b>
of which: Regional and Local Roads	4.5
Rural Regeneration and Development Fund	1.0
National Broadband Plan	2.3
Agriculture	0.8
Tourism	0.3
State Owned Enterprises	0.8
<b>4. Sustainable Mobility</b>	<b>8.6</b>
of which: Dart Expansion	2.0
Metro Link	3.0
BusConnects Programme	2.4
<b>5. A Strong Economy, supported by Enterprise, Innovation and Skills</b>	<b>9.4</b>
of which: Higher/Further Education	3.1
University Investment	2.0
BEI Programmes	3.0
Challenge Based Disruptive Innovation Fund	0.5
Enterprise Agencies	0.8
<b>6. High-Quality International Connectivity</b>	<b>4.8</b>
of which: Airports	3.8
Ports	1.0
<b>7. Enhanced Amenity and Heritage</b>	<b>1.4</b>
of which: Cultural Infrastructure	0.7
Heritage	0.3
Sport	0.3
<b>8. Transition to a Low-Carbon and Climate-Resilient Society</b>	<b>21.8</b>
of which: Energy Efficiency - housing retrofit	3.0
Energy efficiency in public buildings	0.8
Boiler replacement	0.7
Support Scheme for Renewal Heat	0.3
Climate Action Fund	0.5
Electric vehicles	0.2
Flood Defences	1.0
Energy Investment (renewables, interconnection, etc)	13.7
<b>9. Sustainable Management of Water and other Environmental Resources</b>	<b>8.8</b>
of which: Irish Water	8.5
<b>10. Access to Quality Childcare, Education and Health Services</b>	<b>20.1</b>
of which: Childcare	0.4
Education (Schools)	8.8
Health	10.9
<b>11. Other sectors</b>	<b>3.0</b>
of which: Justice	1.3
Defence	0.5
<b>12. Contingency/Reserve</b>	<b>7.4</b>
<b>Total</b>	<b>116</b>

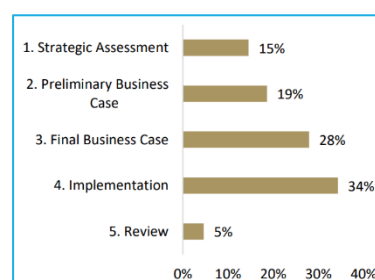
FIGURE 3 NATIONAL STRATEGIC OUTCOMES AND THEIR RELATED INVESTMENT PRIORITIES

## Guide to this Report

It is against the backdrop of the investment plans outlined above that this report analyses public capital investment in terms of construction activity. It is a point-in-time analysis showing the state of play at the end Q3 2020 - what has happened up to this point from 2018 when the National Development plan was launched.

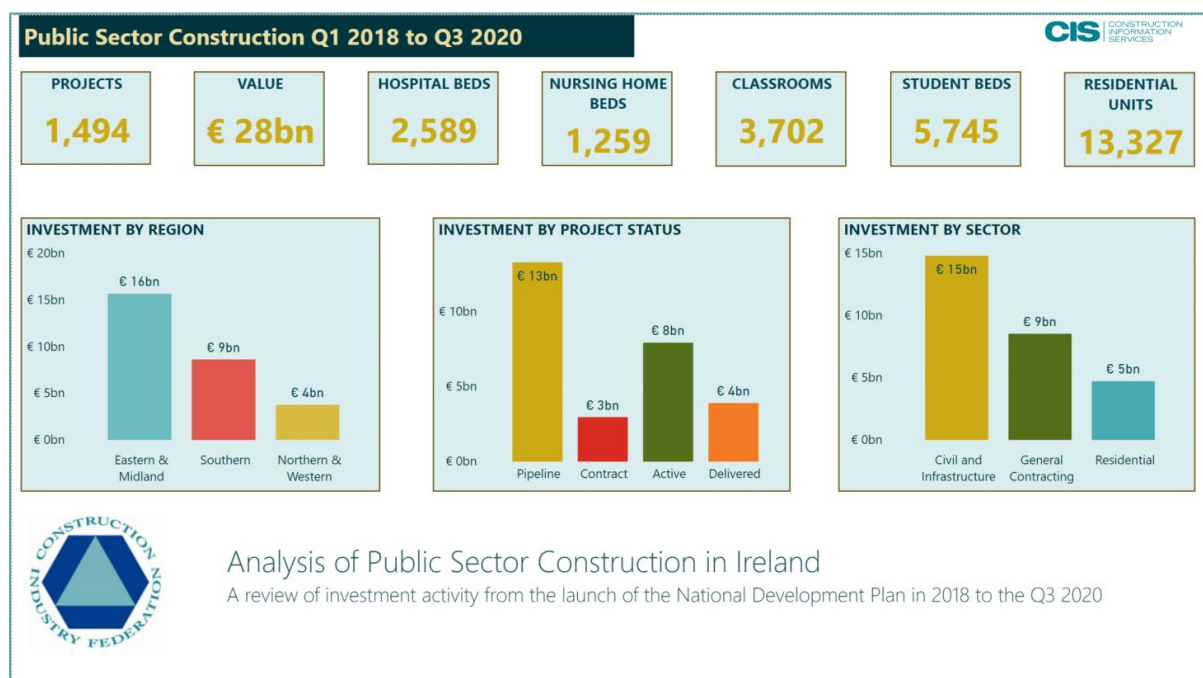
The initial programme of investment (2018-2022) set out in NDP is approaching its midpoint and it is an opportune time to examine the level of investment activity undertaken. By monitoring and tracking public sector construction projects via planning applications and public sector tenders the report quantifies activity at each stage of the construction lifecycle from early design through to project completion and delivery.

Focusing on projects valued in excess of one million euro<sup>3</sup> the report analyses investment activity by lifecycle stage, sector and region<sup>4</sup>. Excluded from the analysis are projects at the appraisal stage as it is difficult to quantify investment values or project timeframes or even to say with certainty that they will progress beyond the appraisal stage. Those projects are however detailed at the end of the report. DPER's Investment Tracker<sup>5</sup> (Updated January 2020) shows the share of projects at lifecycle stage:



Share of Projects at Lifecycle stage (DPER Investment Tracker) Source: Build 2020 Construction Sector Performance and Capacity

The report is a high-level review of investment since the launch of the NDP. Accompanying this report is an interactive report which allows deeper scrutiny of the figures by sector, region, status and value and shows the supporting evidence for the analysis i.e. the projects behind it.



<sup>3</sup> Based on shell and core cost of construction

<sup>4</sup> The methodology at the end of the report details the background to the analysis undertaken.

<sup>5</sup> A range of projects and programmes in excess of €20m committed to by Departments over the period of the NDP

## Report Structure

In the following sections we examine investment, in terms of construction activity, across three primary sectors:

- General Contracting (including Education, Health, Civic)
- Civil and Infrastructural
- Residential (including Student Accommodation)

The report begins with a national overview followed by an analysis of the above sectors in terms of the aggregate levels of investment at each stage of the construction cycle:

Status	Stage	
Pipeline	Pre-Planning	Tenders issued for Design Team
	Planning Application	Planning via local authorities and An Bord Pleanála
	Planning Granted	
Contract	Tender	Tenders for main contract works
	Contract Award	Appointment of Main Contractor
Active	On Site	Under Construction
Delivered	Completed	Construction Completed

Activity is then explored across the three main regions<sup>6</sup> within each sector (see Figure 5):

- Eastern and Midland Region
- Southern Region
- Northern and Western Region

This part of the report mirrors the intention of the National Development Plan to achieve a more balanced development across these regions and to support the development of the cities and urban centres within them. This regional development is central to achieving the desired strategic outcomes of the National Planning Framework set against a backdrop of a projected increase in population of one million over the next two decades.<sup>7</sup>

National Policy Objective 1b
<ul style="list-style-type: none"> <li>○ Eastern and Midland Region: 490,000 - 540,000 additional people i.e. a population of around 2.85 million;</li> </ul>
<ul style="list-style-type: none"> <li>○ Northern and Western Region: 160,000 - 180,000 additional people i.e. a population of just over 1 million;</li> </ul>
<ul style="list-style-type: none"> <li>○ Southern Region: 340,000 - 380,000 additional people i.e. a population of almost 2 million.</li> </ul>

FIGURE 4 EXPECTED POPULATION CHANGES PER NPF

<sup>6</sup> A breakdown of the counties within each region is in Appendix I

<sup>7</sup> Central Statistics Office Census, 2021-2041NPF projections



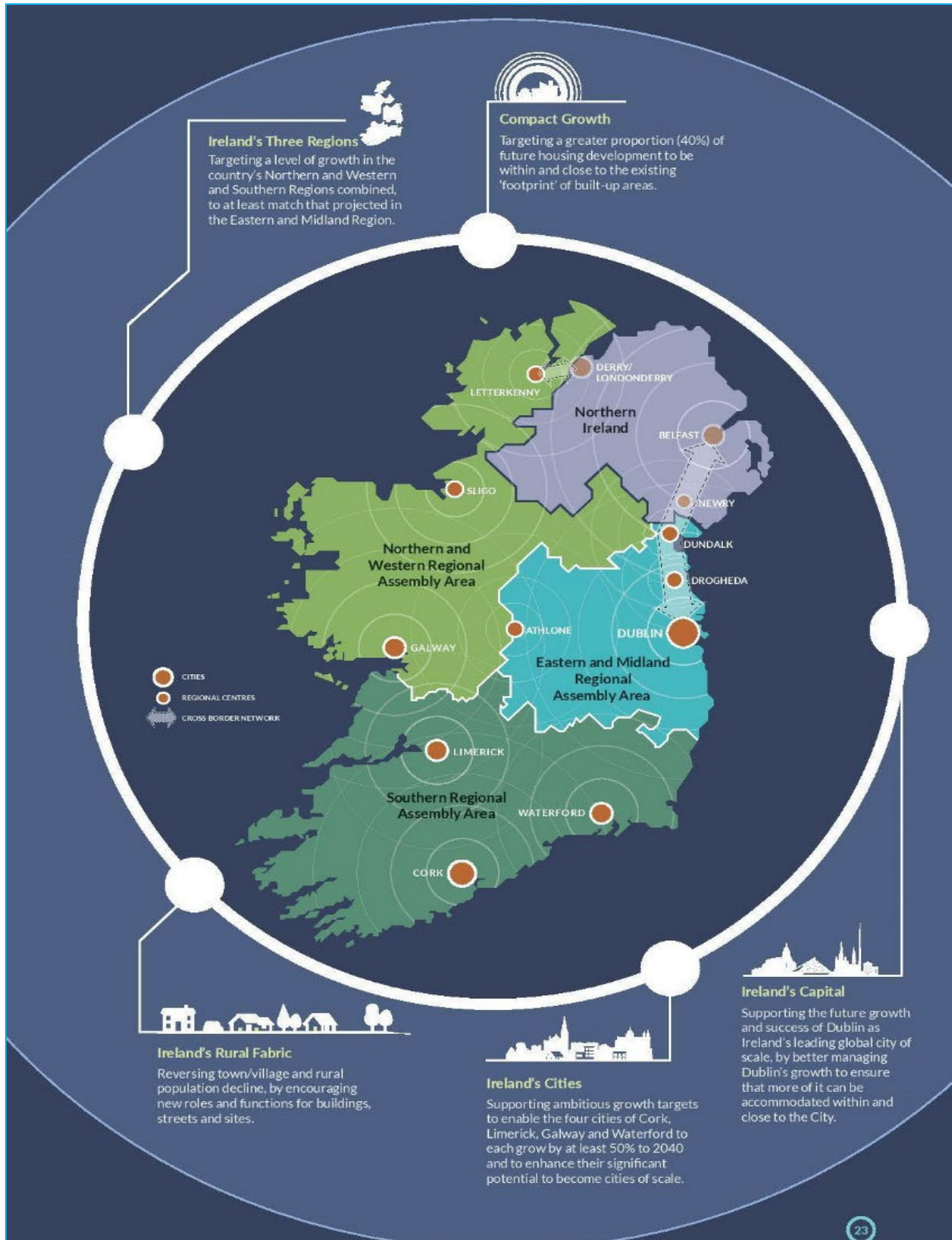


FIGURE 5 PROJECT IRELAND 2040- PUBLIC INVESTMENT AND SPATIAL DEVELOPMENT

## National Overview

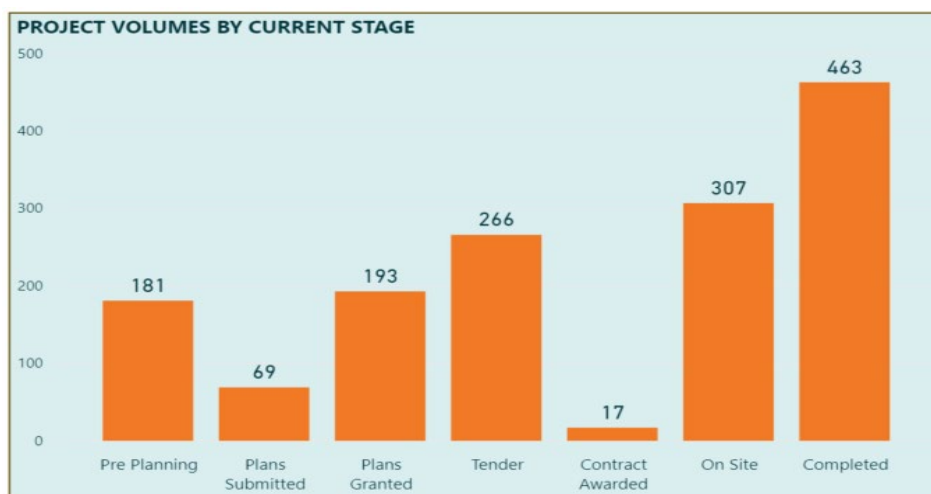


FIGURE 7 PROJECT VOLUMES BY LIFECYCLE STAGE

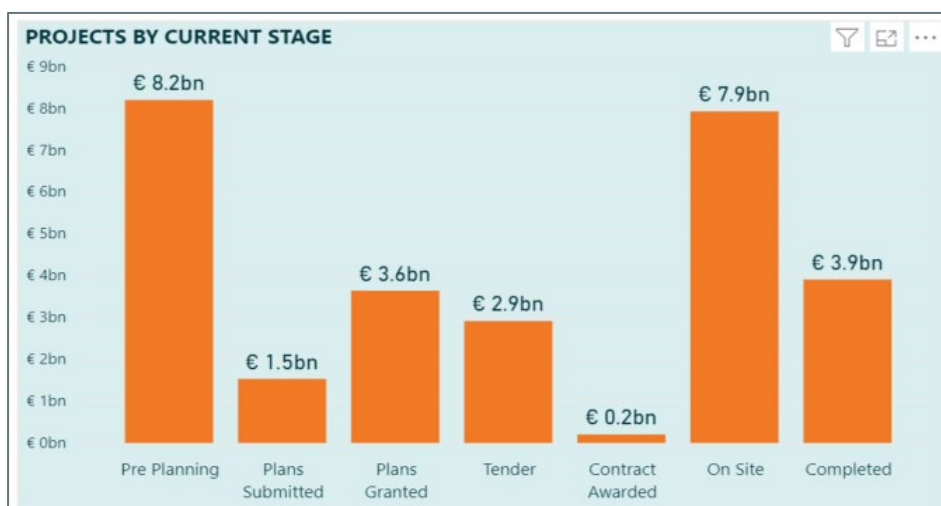


FIGURE 6 CONSTRUCTION VALUE BY LIFECYCLE STAGE

**PROJECTS**  
**1,496**

**VALUE**  
**€ 28bn**

**RESIDENTIAL UNITS**  
**13,258**  
All Stages

**HOSPITAL BEDS**  
**2,589**

**NURSING HOME BEDS**  
**1,259**

**CLASSROOMS**  
**3,702**

**STUDENT BEDS**  
**5,745**

## Lifecycle Analysis

The figures above represent the gross national values for public sector construction across all stages and sectors of construction at the end of Q3 2020.

The analysis identifies nearly 1,500 projects representing a gross value of €28bn. Figures 5 and 6 above show the breakdown of project values and volumes respectively across the various stages.

While a significant number of projects are under construction (On Site) or have been completed the bulk of investment, by value, is at the early stages of procurement<sup>8</sup>. The analysis excludes a further 135 significant projects at various stages of assessment. Excluded also are 124 frameworks.

<sup>8</sup> "Pre Planning" represents projects that have progressed beyond the appraisal stage to the start of procurement i.e. calls for the services of design teams

## Regional Analysis

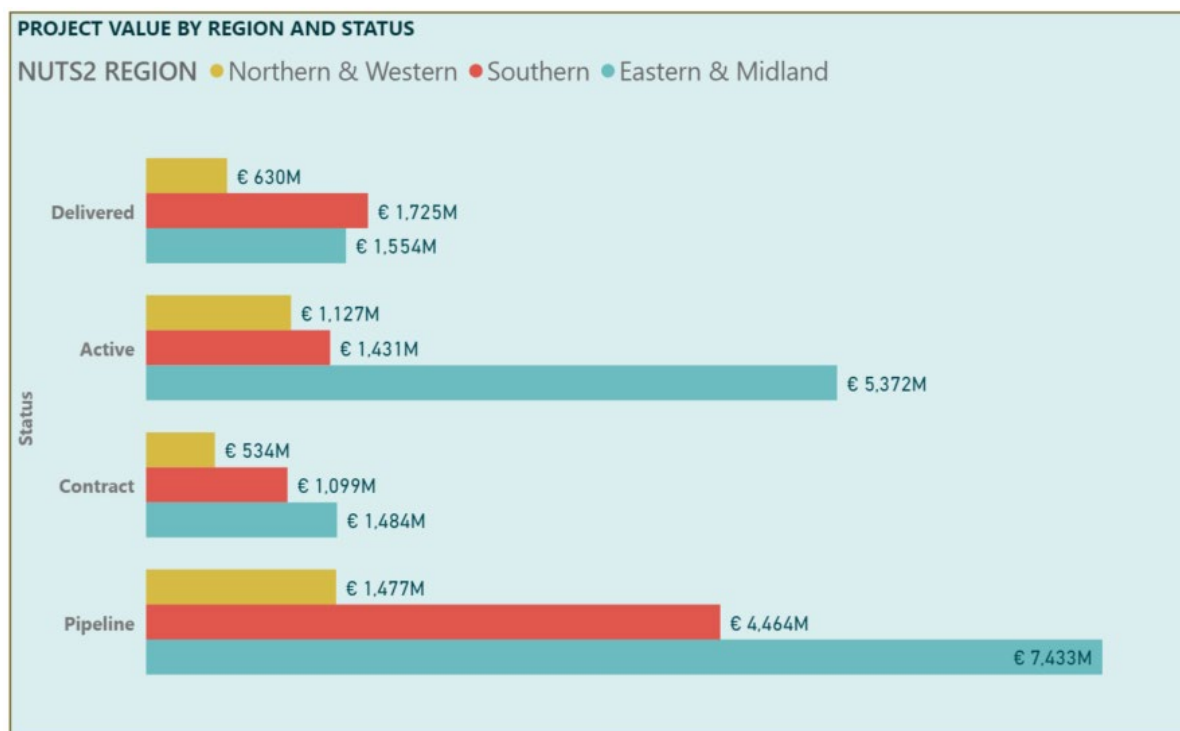
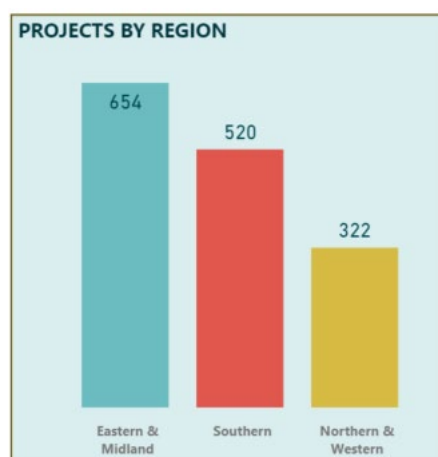


FIGURE 8 PROJECT VALUES BY STATUS AND REGION

Up to the end of Q3 2020 the Eastern and Midland accounts for 56% of all projects by value and 44% by volume (654 projects). Unsurprisingly, Dublin is represented by the highest share of investment by value at 45.4% followed by Cork County at 11.5%.

In the Northern and Western Region there are 322 projects with Galway leading the way with 4.8% of overall investment by value.

In terms of delivered investment (projects completed), the Southern region has the highest share by value which includes the delivery of two large PPP road projects – the M11 Gorey-Enniscorthy motorway and the N25 New Ross Bypass.



The top five national projects represent an investment of €7.5bn and span several counties and stages of development.

TOP 5 PROJECTS				
CIS ID	Project	County	Status	Value
49930	MetroLink	Co. Dublin	Pipeline	€ 3,000M
133896	New Children's Hospital	Co. Dublin	Active	€ 1,700M
775742	€1.2bn - Eastern & Midlands Region Water Supply Project (Shannon to Dublin)	Co. Clare	Pipeline	€ 1,200M
115407	N20 Cork to Limerick	Co. Cork	Pipeline	€ 1,000M
54508	Galway City Ring Road	Co. Galway	Pipeline	€ 600M
<b>Total</b>				<b>€ 7,500M</b>

## Sectoral Analysis

PrimarySector	>€50m	€20m-€50m	€10m-€20m	€5m-€10m	€1m-€5m	Total Investment
<b>Civil and Infrastructure</b>	<b>€ 12,183M</b>	<b>€ 1,200M</b>	<b>€ 730M</b>	<b>€ 443M</b>	<b>€ 269M</b>	<b>€ 14,826M</b>
Civil and Utilities	€ 12,183M	€ 1,200M	€ 730M	€ 443M	€ 269M	€ 14,826M
<b>General Contracting</b>	<b>€ 3,920M</b>	<b>€ 1,343M</b>	<b>€ 1,567M</b>	<b>€ 946M</b>	<b>€ 769M</b>	<b>€ 8,545M</b>
Industrial	€ 185M	€ 95M	€ 87M	€ 48M	€ 60M	€ 475M
Commercial and Office	€ 771M	€ 138M	€ 85M	€ 60M	€ 76M	€ 1,129M
Education	€ 410M	€ 538M	€ 727M	€ 453M	€ 300M	€ 2,428M
Health	€ 2,279M	€ 295M	€ 419M	€ 196M	€ 163M	€ 3,352M
Community and Sport	€ 115M	€ 277M	€ 250M	€ 185M	€ 162M	€ 989M
Hospitality	€ 160M			€ 5M	€ 7M	€ 172M
<b>Residential</b>	<b>€ 2,073M</b>	<b>€ 685M</b>	<b>€ 719M</b>	<b>€ 630M</b>	<b>€ 619M</b>	<b>€ 4,727M</b>
Residential	€ 2,073M	€ 685M	€ 719M	€ 630M	€ 619M	€ 4,727M
<b>Total Investment</b>	<b>€ 18,177M</b>	<b>€ 3,228M</b>	<b>€ 3,016M</b>	<b>€ 2,019M</b>	<b>€ 1,657M</b>	<b>€ 28,097M</b>

FIGURE 9 INVESTMENT BY SECTOR

PrimarySector	Northern & Western	Southern	Eastern & Midland	Total Projects
<b>Civil and Infrastructure</b>	<b>108</b>	<b>123</b>	<b>116</b>	<b>347</b>
Civil and Utilities	108	123	116	347
<b>General Contracting</b>	<b>142</b>	<b>235</b>	<b>340</b>	<b>717</b>
Industrial	7	22	16	45
Commercial and Office	18	24	30	72
Education	45	79	160	284
Health	34	55	56	145
Community and Sport	36	53	76	165
Hospitality	2	2	2	6
<b>Residential</b>	<b>72</b>	<b>159</b>	<b>195</b>	<b>426</b>
Residential	72	159	195	426
<b>Total Projects</b>	<b>322</b>	<b>517</b>	<b>651</b>	<b>1,490</b>

FIGURE 10 INVESTMENT BY SECTOR AND REGION  
(Excluding Agriculture and Design Projects)



FIGURE 11 PROJECTS BY SECTOR AND REGION

Civil and Infrastructure projects account for over 50% of gross investment by value but only 23% by volume with the vast majority valued in excess of €50m.

Residential projects account for 28.5% of projects with over 50% of these in the pipeline.

Health sector investment is the largest within General Contracting, dominated by the New Children’s Hospital and the National Maternity Hospital.

## General Contracting

Including Health, Education, Civic, Industrial, Office

This sector accounts for €8.7bn of investment with health and education accounting for 65% of this total. There are 723 projects identified – 343 in the Eastern and Midland Region, 238 in the Southern Region and 142 in The Northern & Western region. The Eastern and Midland region accounts for 66% of investment by value while the Northern and Western region accounts for just over 9%.

The top five projects are dominated by health. The sheer size of the Children’s Hospital development tends to distort the general analysis throughout. Of the top 5 projects four of these are Dublin based, the exception being the Opera Centre Development in Limerick.



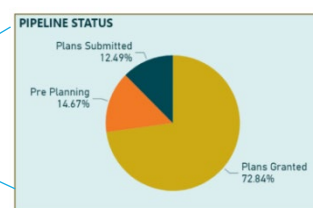
TOP PROJECTS				
CIS ID	Project	County	Status	Value
133896	New Children's Hospital	Co. Dublin	Active	€ 1,700M
735547	National Maternity Hospital	Co. Dublin	Pipeline	€ 300M
819226	€180m - Opera Centre Redevelopment	Co. Limerick	Pipeline	€ 180M
788254	€150m - ESB HQ Development	Co. Dublin	Active	€ 150M
690198	National Forensic Mental Hospital on Portrane campus (Central Mental Hospital)	Co. Dublin	Active	€ 125M
<b>Total</b>				<b>€ 2,455M</b>

## Lifecycle Analysis

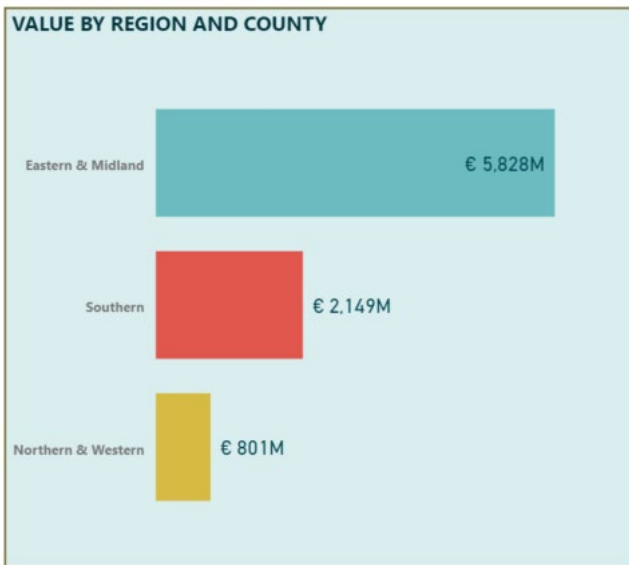
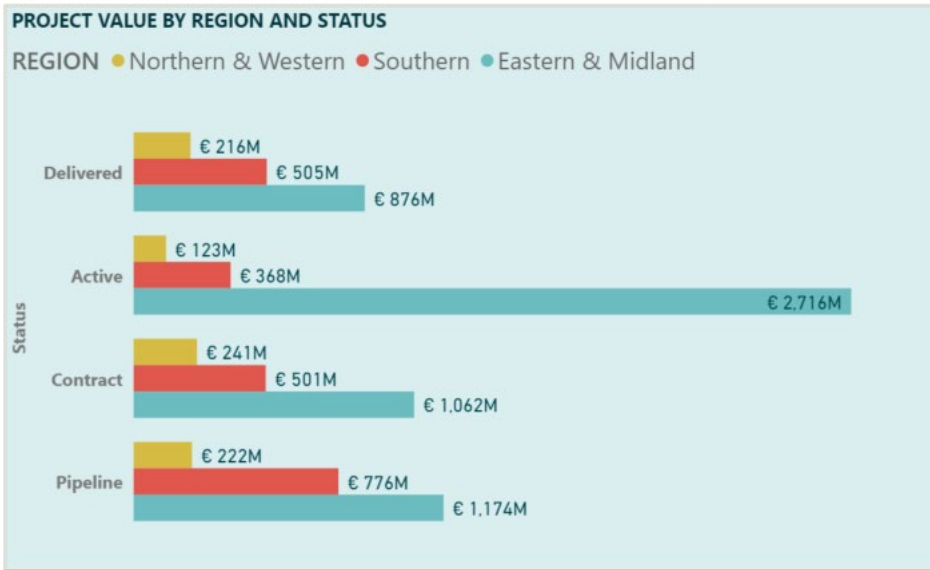
There is a relatively even spread of projects across all stages of development and this holds when we break the analysis into the three regions, again with the notable exception of the Children’s hospital inflating the figures for ‘Active’ construction within the Eastern and Midland region. Within the pipeline over three quarters of the projects have gained planning approval.

The top five projects completed are:

TOP 5 PROJECTS DELIVERED				
CIS ID	Project	County	Status	Value
799246	National Rehabilitation Hospital Redevelopment - Phase 1	Co. Dublin	Delivered	€ 79M
756616	€70m Trinity College - Business School	Co. Dublin	Delivered	€ 70M
798904	€65m - Racecourse Redevelopment	Co. Kildare	Delivered	€ 65M
130435	National Indoor Arena Phase 2	Co. Dublin	Delivered	€ 50M
820407	Waterford University Hospital Ward Block	Co. Waterford	Delivered	€ 31M
<b>Total</b>				<b>€ 295M</b>



## Regional Analysis



## Eastern and Midland Region

TOP PROJECTS				
CIS ID	Project	County	Status	Value
133896	New Children's Hospital	Co. Dublin	Active	€ 1,700M
735547	National Maternity Hospital	Co. Dublin	Pipeline	€ 300M
788254	€150m - ESB HQ Development	Co. Dublin	Active	€ 150M
690198	National Forensic Mental Hospital on Portrane campus (Central Mental Hospital)	Co. Dublin	Active	€ 125M
980281	€120m - Biopharmaceutical and Knowledge Industry Campus	Co. Louth	Pipeline	€ 120M
<b>Total</b>				<b>€ 2,395M</b>

PROJECTS  
**343**

VALUE  
**€ 6bn**

HOSPITAL BEDS  
**1,459**

NURSING HOME BEDS  
**410**

CLASSROOMS  
**2,045**

There are 343 projects in the Eastern and Midland region which account for €6bn of investment. The top 5 projects are all Dublin based.

Outside of Dublin the largest project is the IDA's €120m Biopharmaceutical and Knowledge Industry campus in Dundalk which was granted an extension of duration to planning permission in March 2018. The four other largest projects outside Dublin are all in Kildare.

TOP 5 PROJECTS OUTSIDE DUBLIN				
CIS ID	Project	County	Status	Value
980281	€120m - Biopharmaceutical and Knowledge Industry Campus	Co. Louth	Pipeline	€ 120M
798904	€65m - Racecourse Redevelopment	Co. Kildare	Delivered	€ 65M
927804	Forensic Science Laboratory	Co. Kildare	Active	€ 65M
1002991	€50m - Academic Building	Co. Kildare	Active	€ 50M
1034067	€40m - Data Centre/Office Development	Co. Kildare	Contract	€ 40M
<b>Total</b>				<b>€ 340M</b>



Forty-eight projects are currently under construction while 110 are completed representing investment of €2.7bn and €0.9bn respectively

## Southern Region

There are 238 projects in the Southern Region representing over €2bn of investment. The top 5 projects are spread across five counties.

TOP 5 PROJECTS				
CIS ID	Project	County	Status	Value
819226	€180m - Opera Centre Redevelopment	Co. Limerick	Pipeline	€ 180M
1032761	€120m - Trinity Wharf Development	Co. Wexford	Pipeline	€ 120M
919259	Abbey Quarter	Co. Kilkenny	Active	€ 100M
590052	€80m - Event and Convention Centre	Co. Cork	Contract	€ 80M
1119230	Design Team Procurement	Co. Limerick	Pipeline	€ 80M
<b>Total</b>				<b>€ 560M</b>

**PROJECTS**  
238

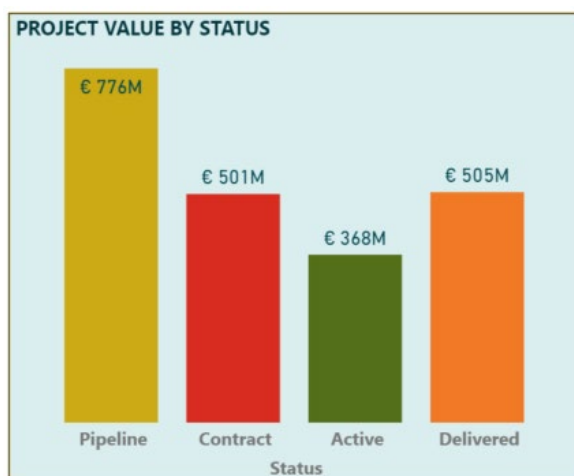
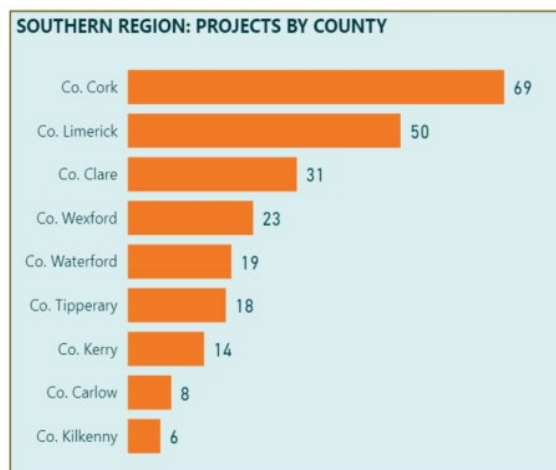
**VALUE**  
€ 2bn

**HOSPITAL BEDS**  
792

**NURSING HOME BEDS**  
593

**CLASSROOMS**  
1,168

The largest project is the €180m Opera Centre redevelopment in Limerick which gained planning approval from An Bord Pleanála in 2018. Tenders for the design team were issued in late August of this year. The only project under construction in the top 5 is the development works to the Brewhouse building in Kilkenny commenced in July 2019 as part of the Abbey Quarter urban regeneration.



There are an even spread of projects across all stages. Cork has the largest number of projects while Limerick the highest level of investment. Five projects are valued over €50m.



## Northern and Western Region

There are 142 projects in the Northern and Western Region valued at just over €800m. The top five projects are all in Galway.

TOP PROJECTS				
CIS ID	Project	County	Status	Value
999092	€60m - Design and Build Student Accommodation	Co. Galway	Pipeline	€ 60M
1121276	€30m - Hospital Extension	Co. Galway	Contract	€ 30M
587600	Garda Divisional Headquarters (Galway)	Co. Galway	Delivered	€ 25M
1074007	GMIT STEM building	Co. Galway	Pipeline	€ 25M
970600	€20m - Post Primary School Development	Co. Galway	Active	€ 20M
<b>Total</b>				<b>€ 160M</b>

**PROJECTS**  
142

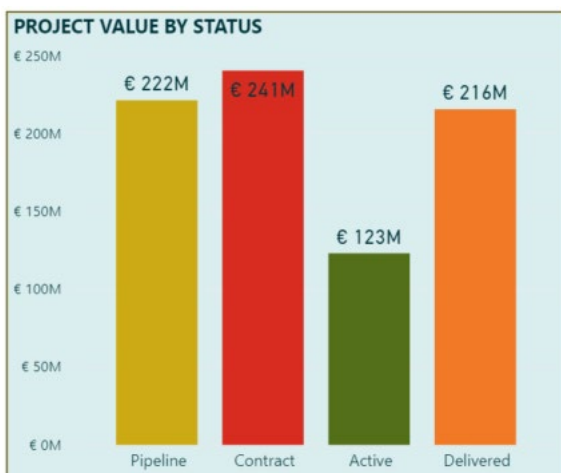
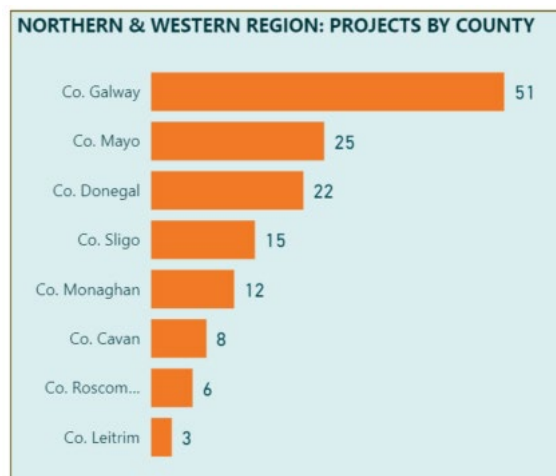
**VALUE**  
€ 801M

**HOSPITAL BEDS**  
338

**NURSING HOME BEDS**  
242

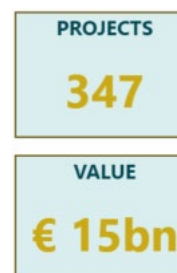
**CLASSROOMS**  
486

The largest project is the construction of Clarin College post primary school in Galway, started in Q1 2018 and due for completion this year. The highest value project completed is the Garda Regional and Divisional Headquarters for the Office of Public works. Outside of Galway the two largest projects are health projects in Donegal both for the HSE. An €18.3m Community/ Residential Care Unit in Letterkeny, for which tenders have been returned and a €19m Community Nursing Unit in Ballyshannon, where works began in August 2020 and are due for completion in early 2022.



## Civil and Infrastructure

This sector accounts for €14.8bn of investment. There are 347 projects identified – 116 in the Eastern and Midland Region, 123 in the Southern Region and 108 in the Northern and Western region. The Eastern and Midland region accounts for 47% of investment by value while the Southern Region accounts for 36% and the Northern and Western 16%.



The top projects are regionally well spread topped by the Metrolink project. Only one scheme in excess of €500m has been delivered – the M11 Gorey to Enniscorthy bypass.

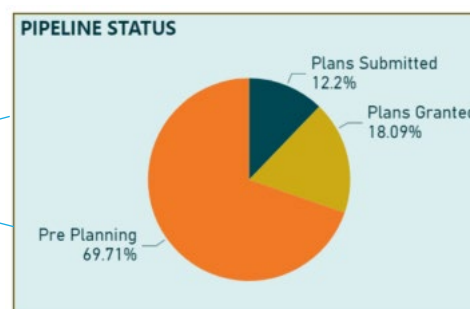
TOP PROJECTS				
CIS ID	Project	County	Status	Value
49930	MetroLink	Co. Dublin	Pipeline	€ 3,000M
775742	€1.2bn - Eastern & Midlands Region Water Supply Project (Shannon to Dublin)	Co. Clare	Pipeline	€ 1,200M
115407	N20 Cork to Limerick	Co. Cork	Pipeline	€ 1,000M
54508	Galway City Ring Road	Co. Galway	Pipeline	€ 600M
838559	€500m - Expansion of Waste Water Treatment Plant	Co. Dublin	Active	€ 500M
144209	€500m - Water Eco-park	Co. Offaly	Pipeline	€ 500M
707719	Greater Dublin Drainage	Co. Dublin	Pipeline	€ 500M
128977	PPP: M11 Gorey-Enniscorthy Motorway	Co. Wexford	Delivered	€ 500M
<b>Total</b>				<b>€ 7,800M</b>

## Lifecycle Analysis

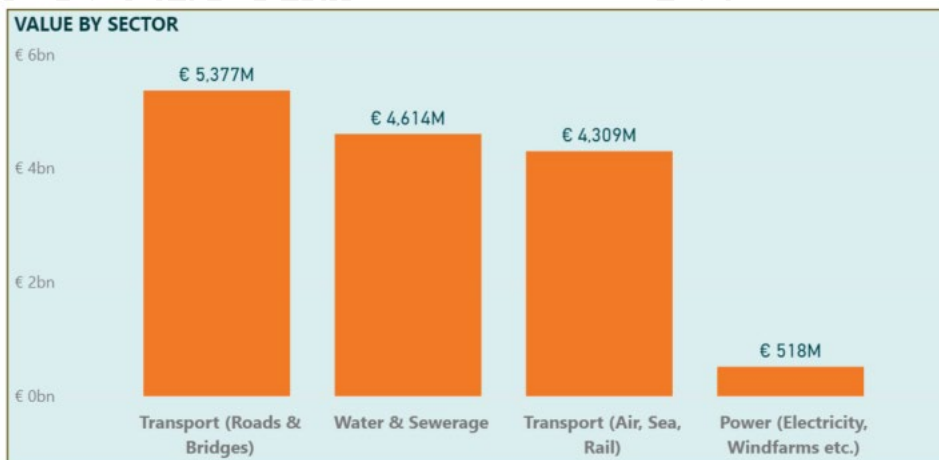
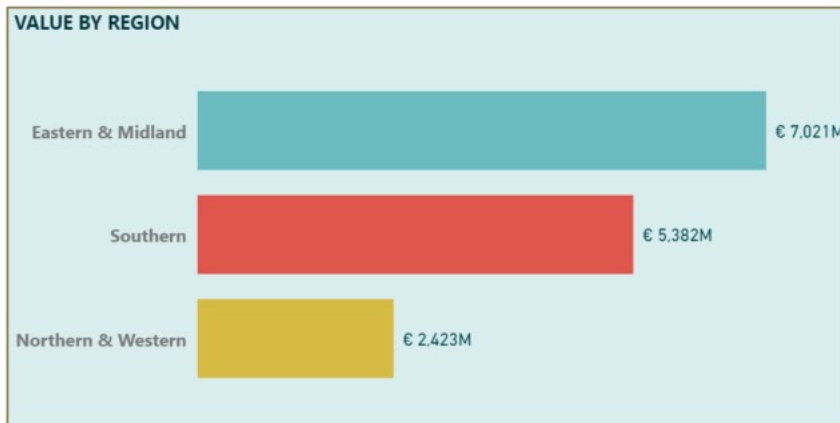
Nearly 60% of projects by value in this sector are at pipeline stage accounting for over half of all investment at €8.8bn. Of these 70% are a pre-planning stage. 23% of projects are currently under construction led by the works on the Ringsend Wastewater Treatment Plant Upgrade (€500m).

The top five projects under construction are:

TOP PROJECTS				
CIS ID	Project	County	Status	Value
838559	€500m - Expansion of Waste Water Treatment Plant	Co. Dublin	Active	€ 500M
871857	North Runway Project at Dublin Airport	Co. Dublin	Active	€ 320M
836463	Oweninny Wind Farm Project (Phase 1)	Co. Mayo	Active	€ 320M
134354	N22 Ballyvourney to Macroom	Co. Cork	Active	€ 280M
748865	N5 Westport to Turlough	Co. Mayo	Active	€ 241M
<b>Total</b>				<b>€ 1,661M</b>



## Regional Analysis



## Eastern and Midland Region

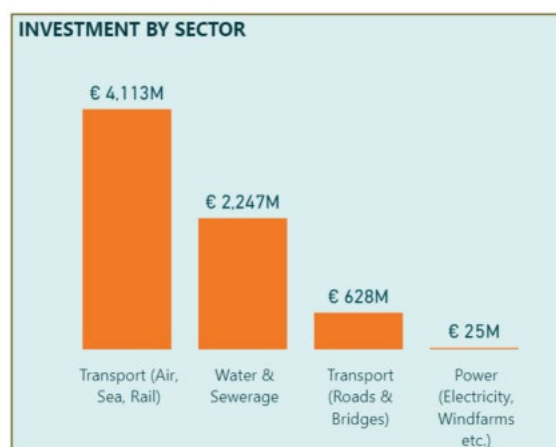
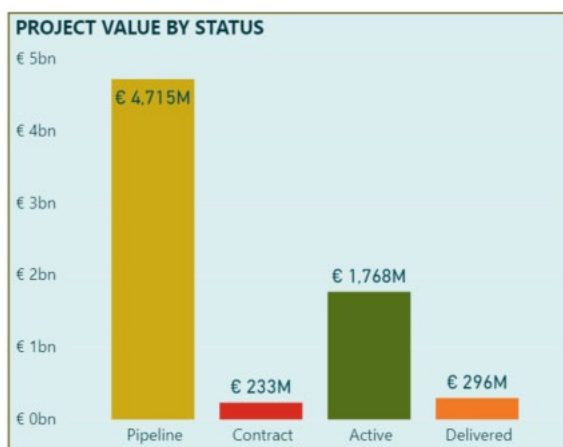
There are 116 projects in the Eastern and Midland region which account for €7bn of investment. The top 5 projects are all Dublin based.



TOP PROJECTS				
CIS ID	Project	County	Status	Value
49930	MetroLink	Co. Dublin	Pipeline	€ 3,000M
838559	€500m - Expansion of Waste Water Treatment Plant	Co. Dublin	Active	€ 500M
707719	Greater Dublin Drainage	Co. Dublin	Pipeline	€ 500M
1059138	€320m - Port Expansion	Co. Dublin	Pipeline	€ 320M
871857	North Runway Project at Dublin Airport	Co. Dublin	Active	€ 320M
<b>Total</b>				<b>€ 4,640M</b>

Included in the top 5 is the €320m second phase of expansion of Dublin Port which received the go-ahead in July from An Bord Pleanála. Also included are works for the North Runway at Dublin Airport which got underway in late 2018. Investment in Dublin accounts €5.7bn made up of 62 projects. Investment outside Dublin is shown below.

TOP PROJECTS				
CIS ID	Project	County	Status	Value
873012	€200m - Vartry Water Treatment Plant	Co. Wicklow	Active	€ 200M
663803	€110m - M7 Naas to Newbridge Bypass Upgrade Scheme	Co. Kildare	Active	€ 110M
950642	N2 Slane Bypass	Co. Meath	Pipeline	€ 100M
905247	€35m - Leixlip Transfer Pipeline and Wastewater Network Upgrade Project	Co. Kildare	Active	€ 35M
936648	Old Connaught/Woodbrook Water Scheme	Co. Wicklow	Contract	€ 35M
<b>Total</b>				<b>€ 480M</b>



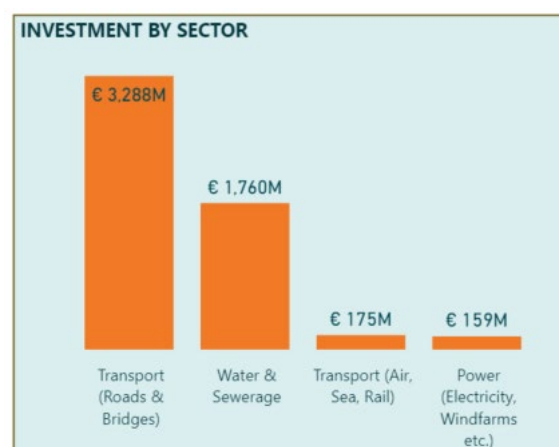
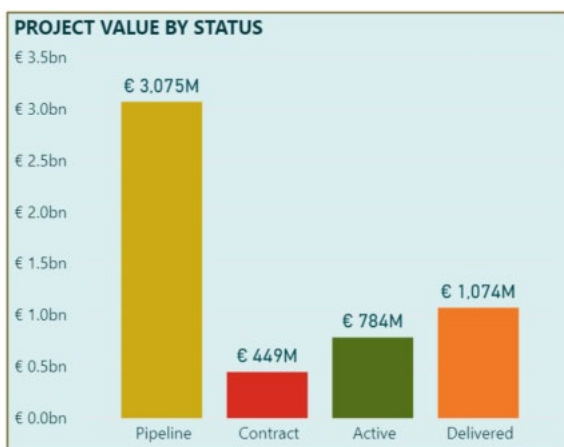
## Southern Region

There are 123 projects in the Southern region which account for €5.4bn of investment. The top 5 projects are spread across four counties.



TOP PROJECTS				
CIS ID	Project	County	Status	Value
775742	€1.2bn - Eastern & Midlands Region Water Supply Project (Shannon to Dublin)	Co. Clare	Pipeline	€ 1,200M
115407	N20 Cork to Limerick	Co. Cork	Pipeline	€ 1,000M
128977	PPP: M11 Gorey-Enniscorthy Motorway	Co. Wexford	Delivered	€ 500M
957468	N21/N69 Limerick to Adare to Foynes	Co. Limerick	Pipeline	€ 450M
134354	N22 Ballyvourney to Macroom	Co. Cork	Active	€ 280M
<b>Total</b>				<b>€ 3,430M</b>

The largest project is the €1.2bn Shannon pipeline project for Irish Water with discussion currently ongoing with An Bord Pleanála. Also, in the pipeline is €1bn N20/M20 Cork to Limerick Motorway scheme. Tenders for site investigation studies were returned in September. Works are ongoing on the €280m N22 Baile Bhuirne scheme in Cork.



Cork tops the investment table in terms of value (€2.2bn) and number of projects (44). Investment in Road Transport is the largest at €3.2bn. Forty-two projects have been completed and a further 25 are under construction.

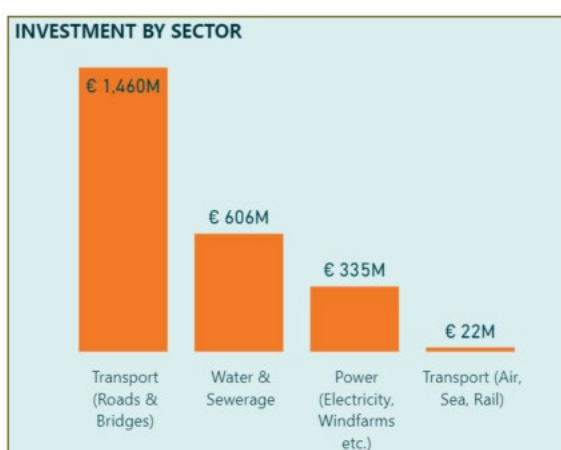
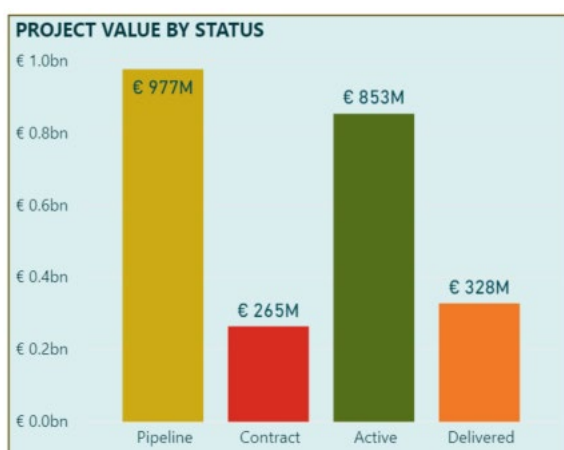
## Northern and Western Region

There are 108 projects in the Northern and Western region which account for €2.4bn of investment. The top 5 projects are spread across four counties- Mayo (2), Galway, Cavan and Sligo.



TOP PROJECTS				
CIS ID	Project	County	Status	Value
54508	Galway City Ring Road	Co. Galway	Pipeline	€ 600M
836463	Oweninny Wind Farm Project (Phase 1)	Co. Mayo	Active	€ 320M
761269	€280m - North-South 400kV Interconnector	Co. Cavan	Pipeline	€ 280M
748865	N5 Westport to Turlough	Co. Mayo	Active	€ 241M
593446	N4 Collooney to Castlebaldwin	Co. Sligo	Active	€ 150M
<b>Total</b>				<b>€ 1,591M</b>

The largest project is the N6 Galway City Outer Bypass Scheme which was due before An Bord Pleanála in March 2020 for an Oral Hearing (subsequently postponed). Three projects are currently under construction: the development of a €320m wind farm in north Mayo; the €241m - N5 Westport to Turlough Road Project, due for completion in early 2023; the €150m N4 Collooney to Castlebaldwin Road Development Project due for completion at the end of 2021.



The largest level of investment to date is in Galway (€748m) followed closely by Mayo (€612m). The largest number of projects are in Donegal (35).

## Residential

Including Student Accommodation

The residential sector measures residential projects directly undertaken by public sector bodies including councils and housing associations. It excludes social housing acquired or construction as part of private developments.

The sector accounts for €4.7bn of investment. There are 426 projects identified – 195 in the Eastern and Midland Region, 159 in the Southern Region and 72 in The Northern and Western region.

There are 7 public sector Student Accommodation projects with an investment value of €490m equating to over 5,000 student beds.

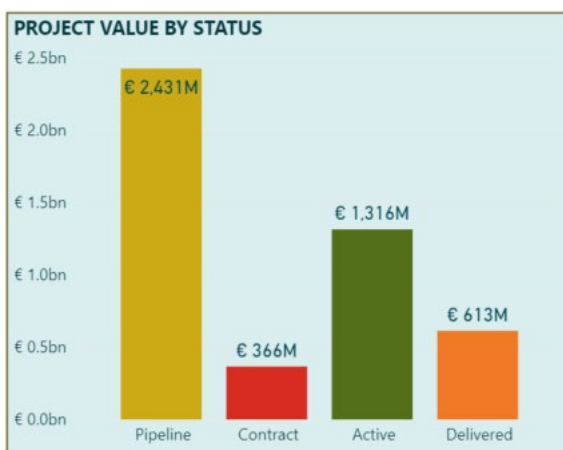
The top 5 projects are all Dublin based. Four are residential pipeline projects and the fifth is a €300m Student Accommodation project at University College Dublin creating over 2,000 student bed spaces and currently under construction.



TOP PROJECTS				
CIS ID	Project	County	Status	Value
1110965	€140m - Design and Delivery of Housing	Co. Dublin	Pipeline	€ 140M
1014125	Cost Rental Residential Project - Prior Information Notice	Co. Dublin	Pipeline	€ 200M
1103280	Design and Build Social Housing	Co. Dublin	Pipeline	€ 200M
1005177	Mixed Tenure Residential Development	Co. Dublin	Pipeline	€ 220M
959107	UCD Future Campus Phase 1	Co. Dublin	Active	€ 300M
<b>Total</b>				<b>€ 1,060M</b>

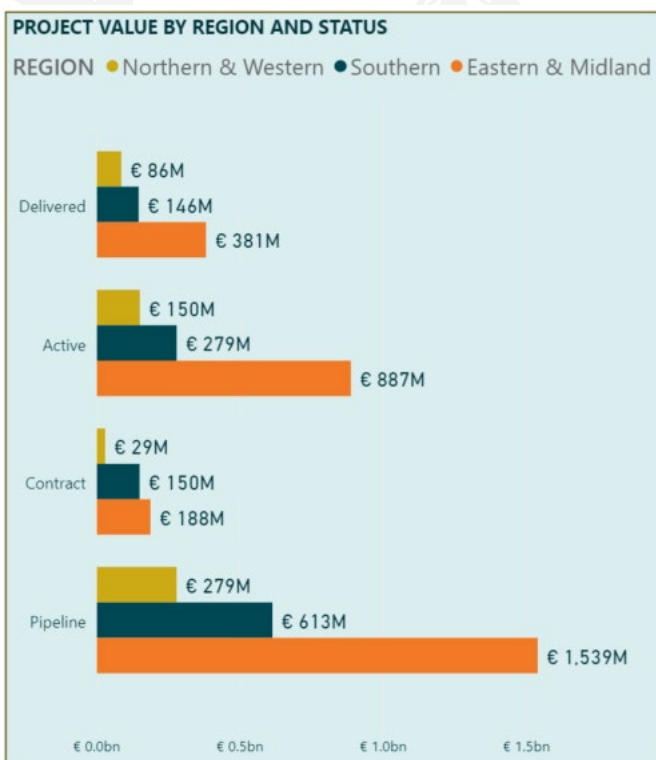
## Lifecycle Analysis

Over 50% of projects by value are in the pipeline and the majority of these are at a very early stage and include design and build contracts and land acquisition schemes. It is not possible to determine with any accuracy the number of housing units proposed for these schemes. For schemes that have reached planning stage and beyond to completion there have been nearly 3,500 units completed and nearly 8,000 are currently under construction.



## Regional Analysis

SECTOR	Residential					
REGION	RESIDENTIAL UNITS	HOUSING	APARTMENTS	UNITS STARTED	UNITS COMPLETED	STUDENT BEDS
Northern & Western	1,593	1287	306	1,119	342	1,103
Southern	3,660	2740	920	2,321	841	255
Eastern & Midland	8,005	4680	3325	4,338	2,237	3,970
<b>Total</b>	<b>13,258</b>	<b>8707</b>	<b>4551</b>	<b>7,778</b>	<b>3,420</b>	<b>5,328</b>





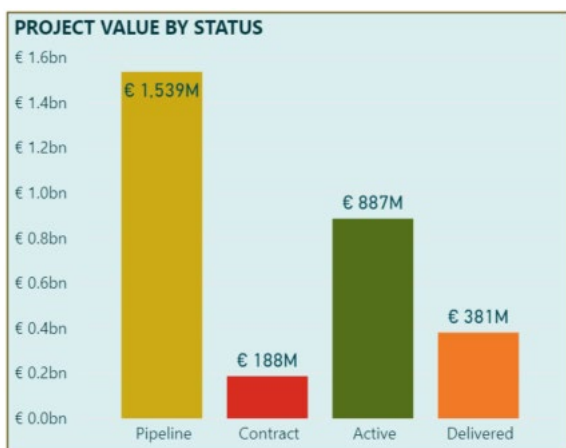
## Eastern and Midland Region

There are 195 projects in the Eastern and Midland region which account for €3bn of investment. Nearly 80% of investment is in Dublin with 12% in the Mid-East region and 8% in the Midlands.

The top projects outside Dublin are regionally wide spread.

TOP PROJECTS OUTSIDE DUBLIN				
CIS ID	Project	County	Status	Value
982282	Lissywollen, Athlone	Co. Westmeath	Pipeline	€ 120M
1096603	€50m - Development of Social Housing Developments	Co. Meath	Pipeline	€ 50M
1086559	€43m - 3D Volumetric Housing	Co. Laois	Contract	€ 43M
1087315	€20m - Housing Development	Co. Wicklow	Pipeline	€ 20M
1054568	€5.7m - Residential Development	Co. Meath	Active	€ 6M
941271	€5.7m - Residential Development	Co. Offaly	Delivered	€ 6M
1009852	€5.7m - Residential Development	Co. Wicklow	Delivered	€ 6M
<b>Total</b>				<b>€ 250M</b>

SECTOR	Residential						
	REGION	ALL UNITS	HOUSING	APTS	UNITS STARTED	UNITS COMPLETED	STUDENT BEDS
Dublin		5,660	2621	3039	2,947	1,501	3,970
Mid-East		1,906	1635	271	1,109	579	
Midlands		439	424	15	282	157	
<b>Total</b>		<b>8,005</b>	<b>4680</b>	<b>3325</b>	<b>4,338</b>	<b>2,237</b>	<b>3,970</b>



## Southern Region

There are 159 projects in the Southern region which account for nearly €1.2bn of investment.

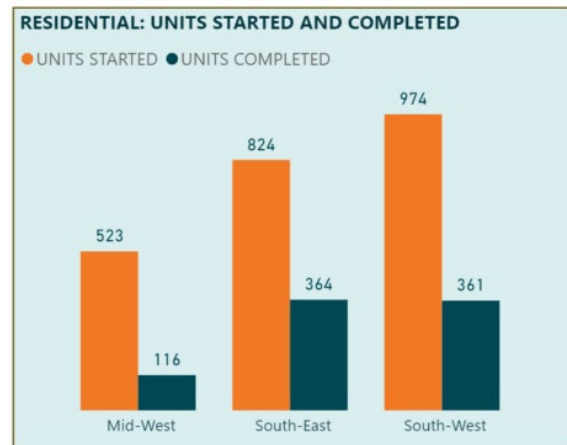
The top projects 5 projects are all at pipeline stage:

TOP PROJECTS					
CIS ID	Project	County	Status	Value	
1063555	€122m - Development of Social Residential Schemes	Co. Kerry	Pipeline	€ 122M	
1105598	Social Housing Schemes	Co. Wexford	Pipeline	€ 120M	
977664	€100m - Social Housing PPP - Bundle 2	Co. Cork	Pipeline	€ 100M	
1100690	Social Housing Proposals	Co. Cork	Pipeline	€ 50M	
1078121	€35m - Development of Social Housing Schemes	Co. Wexford	Pipeline	€ 35M	
<b>Total</b>				<b>€ 427M</b>	



Development is evenly spread within the region.

SECTOR	Residential						
	REGION	ALL UNITS	HOUSING	APTS	UNITS STARTED	UNITS COMPLETED	STUDENT BEDS
Mid-West		1,058	811	247	523	116	
South-East		1,149	862	287	824	364	
South-West		1,453	1067	386	974	361	255
<b>Total</b>		<b>3,660</b>	<b>2740</b>	<b>920</b>	<b>2,321</b>	<b>841</b>	<b>255</b>



## Northern and Western Region

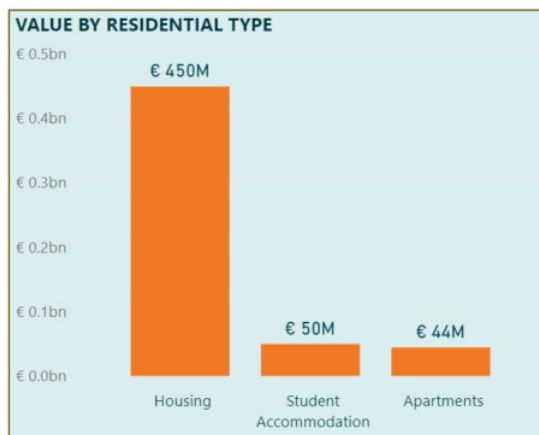
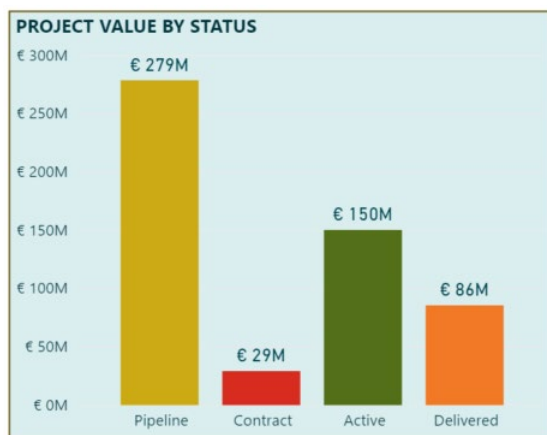
There are 72 projects in the Northern and Western region which account for nearly €544m of investment.

The top project is an early pipeline project from Clúid Housing inviting submission for the development of Social housing schemes.



TOP PROJECTS						
CIS ID	Project	County	Status	Value		
1071281	€60m - Social Residential Schemes	Co. Galway	Pipeline	€ 60M		
1106791	€50m - Turnkey Developments	Co. Donegal	Pipeline	€ 50M		
976930	Land Developments	Co. Donegal	Pipeline	€ 50M		
840643	€26m - Student Accommodation	Co. Galway	Delivered	€ 27M		
1035787	€23m - Student Accommodation	Co. Galway	Pipeline	€ 23M		
<b>Total</b>				<b>€ 210M</b>		

SECTOR	Residential						
	REGION	ALL UNITS	HOUSING	APTS	UNITS STARTED	UNITS COMPLETED	STUDENT BEDS
Border		676	554	122	509	216	
West		917	733	184	610	126	1,103
<b>Total</b>		<b>1,593</b>	<b>1287</b>	<b>306</b>	<b>1,119</b>	<b>342</b>	<b>1,103</b>



## APPENDIX 1: Ireland's Regions

### Regions

NUTS 2 Region	NUTS 3 Region	County	
<b>Eastern &amp; Midland</b>	Dublin	Co. Dublin	
	Mid-East	Co. Kildare	
		Co. Louth	
		Co. Meath	
	Midlands	Co. Wicklow	
		Co. Laois	
		Co. Longford	
		Co. Offaly	
	<b>Northern &amp; Western</b>	Border	Co. Westmeath
			Co. Cavan
Co. Donegal			
Co. Leitrim			
West		Co. Monaghan	
		Co. Sligo	
		Co. Galway	
		Co. Mayo	
<b>Southern</b>	Mid-West	Co. Roscommon	
		Co. Clare	
		Co. Limerick	
	South-East	Co. Tipperary	
		Co. Carlow	
		Co. Kilkenny	
	South-West	Co. Waterford	
		Co. Wexford	
	Co. Cork		
	Co. Kerry		

## APPENDIX 2: Projects Excluded

*Projects at appraisal stage too early to assess*

### Eastern and Midland Region

Investment	Project	Body	Status	Completion	Location
Climate Action	Drogheda Flood Relief Scheme	Louth County Council	2. Preliminary Business Case	Q4 2027	Louth
Climate Action	Carlingford Flood Relief Scheme	Louth County Council	2. Preliminary Business Case	Q2 2028	Louth
Climate Action	Dundalk Flood Relief Scheme	Louth County Council	2. Preliminary Business Case	2026	Louth
Climate Action	Arklow Flood Relief Scheme	Wicklow County Council	2. Preliminary Business Case	Q3 2024	Wicklow
Culture, Heritage and Sport	Irish Museum of Modern Art	Culture, Heritage and the Gaeltacht	1. Strategic Assessment	Subject to Appraisal	Dublin
Culture, Heritage and Sport	Chester Beatty Library	Culture, Heritage and the Gaeltacht	1. Strategic Assessment	Subject to Appraisal	Dublin
Culture, Heritage and Sport	National Gallery of Ireland	Culture, Heritage and the Gaeltacht	1. Strategic Assessment	Subject to Appraisal	Dublin
Culture, Heritage and Sport	Abbey Theatre	Culture, Heritage and the Gaeltacht	2. Preliminary Business Case	Subject to Appraisal	Dublin
Culture, Heritage and Sport	National Museum of Ireland	Culture, Heritage and the Gaeltacht	2. Preliminary Business Case	Subject to Appraisal	Dublin
Education, Health and Childcare	Connolly Dublin clinical laboratories and Central Sterile Services Department	Health	1. Strategic Assessment	Subject to Appraisal	Dublin

**PUBLIC SECTOR CONSTRUCTION ACTIVITY IN IRELAND Q1 2018-Q3 2020**

Investment	Project	Body	Status	Completion	Location
Education, Health and Childcare	National Rehabilitation Hospital Redevelopment - Phase 2	Health	1. Strategic Assessment	Q4 2026	Dublin
Education, Health and Childcare	Coombe Hospital at St James's	Health	1. Strategic Assessment	Q4 2027	Dublin
Education, Health and Childcare	Mullingar Theatres	Health	1. Strategic Assessment	Q4 2026	Westmeath
Education, Health and Childcare	Beaumont Emergency Department	Health	2. Preliminary Business Case	Q4 2023	Dublin
Education, Health and Childcare	Mater Dublin clinical laboratory replacement	Health	2. Preliminary Business Case	Q4 2027	Dublin
Enterprise, Skills and Innovation Capacity	Maynooth University Technology Society and Innovation Building	Education and Skills	3. Final Business Case	Q2 2021	Kildare
Housing and Sustainable Urban Development	Presentation Convent & Lands, Portlaoise,	Housing, Planning and Local Government	2. Preliminary Business Case	TBC	Laois
Housing and Sustainable Urban Development	Farganstown	Housing, Planning and Local Government	2. Preliminary Business Case	TBC	Meath
Housing and Sustainable Urban Development	Raheen, Clara	Housing, Planning and Local Government	2. Preliminary Business Case	TBC	Offaly
Housing and Sustainable Urban Development	Ballyogan Court, Ballyogan	Housing, Planning and Local Government	3. Final Business Case	TBC	Dublin

**PUBLIC SECTOR CONSTRUCTION ACTIVITY IN IRELAND Q1 2018-Q3 2020**

Investment	Project	Body	Status	Completion	Location
Other Sectors	Tom Johnson House	Office of Public Works	2. Preliminary Business Case	Q4 2022	Dublin
Rural Development	M11 Capacity Enhancement (Phase 1 & Phase 2)	Transport, Tourism and Sport	2. Preliminary Business Case	Subject to Appraisal	Wicklow
Rural Development	Laytown to Bettystown Link Road	Transport, Tourism and Sport	3. Final Business Case	Q4 2021	Meath
Water Infrastructure	Lower Liffey Valley*	Irish Water	1. Strategic Assessment	Subject to Appraisal	Kildare
Water Infrastructure	Ringsend - Rathmines and Pembroke - Wastewater Network*	Irish Water	1. Strategic Assessment	Subject to Appraisal	Dublin
Water Infrastructure	Dodder Valley Sewer Reinforcement*	Irish Water	1. Strategic Assessment	Subject to Appraisal	Dublin
Water Infrastructure	South Westmeath Regional Water Supply Scheme (Athlone and Mullingar)	Irish Water	2. Preliminary Business Case	2023	Westmeath
Water Infrastructure	Navan Mid Meath Programme	Irish Water	2. Preliminary Business Case	2026	Meath
Water Infrastructure	Athlone Sewerage Scheme	Irish Water	3. Final Business Case	2023	Westmeath
Water Infrastructure	Greater Dublin Area Groundwater Augmentation	Irish Water	3. Final Business Case	2026	Multi-County
Water Infrastructure	Maynooth Transfer Pipeline	Irish Water	3. Final Business Case	2025	Kildare

## Southern Region

Investment	Project	Body	Status	Completion	Location
Climate Action	Tralee Flood Relief Scheme	Kerry County Council	1. Strategic Assessment	Q1 2026	Kerry
Climate Action	King's Island Flood Relief Scheme	Limerick City & County Council	2. Preliminary Business Case	Q2 2023	Limerick
Climate Action	Lower Lee (Cork City) Flood Relief Scheme	Office of Public Works	3. Final Business Case	Q4 2025	Cork
Education, Health and Childcare	Limerick University Maternity Hospital at University Hospital Limerick	Health	1. Strategic Assessment	Q4 2027	Limerick
Other Sectors	Macroom Garda Station - PPP: Garda Station Bundle	Garda Síochána	2. Preliminary Business Case	2022	Cork
Other Sectors	Clonmel Garda Station - PPP: Garda Station Bundle	Garda Síochána	2. Preliminary Business Case	2022	Tipperary
Rural Development	Glenbrohane Local Hub	Ballyhoura Development CLG	3. Final Business Case	Subject to Appraisal	Limerick
Water Infrastructure	Tralee Wastewater Network*	Irish Water	1. Strategic Assessment	Subject to Appraisal	Kerry
Water Infrastructure	Midleton Wastewater Network*	Irish Water	1. Strategic Assessment	Subject to Appraisal	Cork
Water Infrastructure	Waterford City Wastewater Treatment Plant*	Irish Water	1. Strategic Assessment	Subject to Appraisal	Kilkenny
Water Infrastructure	Clonroadmore Wastewater Treatment Plant*	Irish Water	2. Preliminary Business Case	Subject to Appraisal	Clare
Water Infrastructure	Lahinch Wastewater Treatment Plant	Irish Water	2. Preliminary Business Case	2024	Clare



**PUBLIC SECTOR CONSTRUCTION ACTIVITY IN IRELAND Q1 2018-Q3 2020**

Investment	Project	Body	Status	Completion	Location
Water Infrastructure	Limerick Wastewater Treatment Plant	Irish Water	2. Preliminary Business Case	2025	Limerick
Water Infrastructure	Midleton Wastewater Treatment Plant	Irish Water	2. Preliminary Business Case	2024	Cork
Water Infrastructure	Kilkenny Regional Water Supply Scheme - Upgrade of Troyswood Water Treatment Plant	Irish Water	3. Final Business Case	2023	Kilkenny
Water Infrastructure	Mallow Wastewater Treatment Plant	Irish Water	3. Final Business Case	2023	Cork
Water Infrastructure	Carlow Wastewater Treatment Plant	Irish Water	3. Final Business Case	2025	Carlow

## Northern and Western Region

Investment	Project	Body	Status	Completion	Location
Education, Health and Childcare	Cavan day ward upgrade	Health	1. Strategic Assessment	Subject to Appraisal	Cavan
Enterprise, Skills and Innovation Capacity	IT Sligo Extension to Central Campus	Education and Skills	3. Final Business Case	Q4 2022	Sligo
Housing and Sustainable Urban Development	Willowbrook, Glencar, Letterkenny	Housing, Planning and Local Government	2. Preliminary Business Case	TBC	Donegal
Housing and Sustainable Urban Development	Robbers' Lane, Maugheraboy, Sligo	Housing, Planning and Local Government	2. Preliminary Business Case	TBC	Sligo
Other Sectors	Sligo Garda Station - PPP: Garda Station Bundle	Garda Síochána	2. Preliminary Business Case	2022	Sligo
Water Infrastructure	Galway City Wastewater Network*	Irish Water	1. Strategic Assessment	Subject to Appraisal	Galway
Water Infrastructure	Roscommon Sewerage Scheme	Irish Water	3. Final Business Case	2023	Roscommon

## APPENDIX 3: Methodology

### General Research

- CIS monitor construction activity in Ireland via planning applications, planning appeals, public sector tenders, BCMS commencements and completions and desk-based research.
- Researchers track major projects from planning to completion and gather relevant data and metrics.
- CIS track and monitor all projects, including residential self-builds and extensions, but apply a less stringent research framework to those projects.
- Project Values: Project values are calculated by an in-house CIS cost calculator created with the help of QS and project costing professionals. Project values are based on shell and core construction costs calculated by using various metrics such as floor area, housing units, road lengths. Factored into the calculations is the type of build and the location of the build. For residential projects units are based on a fixed cost of €200k per units (€150k for apartments)

### Specific to this Report

- The report is a snapshot of Public Sector construction activity at the end of Q3 2020. The starting point for analysis is January 1 2018. All projects from that date forward are included
  - Planning applications
  - Planning Grants
  - Tenders Published
  - Projects Started
  - Project Completed
  - Projects already under construction at Jan 1 2018.
- The scope of projects used for this report are projects valued at €1m or above, based on shell and core construction cost
- Public Sector projects are identified as those projects where the planning applicant or awarding authority is the main client on a project. Projects included are from Direct Exchequer, Indirect Exchequer, Local Authorities and Housing Associations. Some private sector residential projects have been included where CIS have been able to identify a social element to the project.
- Project Status:

Status	Stage	
<b>Pipeline</b>	Pre-Planning	Tenders issued for Design Team
	Planning Application	Planning via local authorities and An Bord Pleanála
	Planning Granted	
<b>Contract</b>	Tender	Tenders for main contract works
	Contract Award	Appointment of Main Contractor
<b>Active</b>	On Site	Under Construction
<b>Delivered</b>	Completed	Construction Completed

- When construction on the main works of a project begins, we consider the whole project to have begun. This is obviously not the case in large phased developments with multiple elements
- Planning Applications that have been refused or withdrawn have been excluded – although many of these will re-appear with amendments
- CIS generally use generic titles for projects. In cases where we have matched our projects to DEPR's Project then we have used the Project Tracker name for the project which tends to be less generic.
- Residential Projects: Where we have not been able to establish the number of units commenced or completed on a project, we have used date modelling based on past projects to firstly estimate a project's duration and subsequently to apportion the number of units started and completed based on a straight line correlation
- On site and phased developments. When a project starts we consider the whole project to have begun even though on larger schemes elements of projects may be started and completed independently of the whole scheme.
- Where projects cross more than one county, such as roads and water projects, the project is assigned the county at the point of origin



Construction Information Services  
Suites 3 & 4, The Cubes,  
Beacon South Quarter  
Sandyford,  
Dublin 18

**T:** (01) 299 9200

**E:** Sales@cisireland.com

**[www.cisireland.com](http://www.cisireland.com)**

