ROUTES TO A RESILIENT TOMORROW
BUILDING A FUTURE-READY IRELAND

John O’Regan
Director, AECOM
Republic of Ireland
Looking back at last year
2020

a challenging year
DATA AND DIGITISATION
CARBON REDUCTION
Annual review of the construction industry in Ireland

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THOUGHT LEADERSHIP

Delivering affordable housing
How rail can support sustainable development
THOUGHT LEADERSHIP

SUCCESSFUL PROGRAMME MANAGEMENT REQUIRES AN INTEGRATED APPROACH – WHICH TAKES TIME TO BUILD

When it comes to infrastructure and programmes of major transformation and change, establishing a shared operating culture is key. AECOM’s Darvel Cummins and Colin Tully propose taking time to embed the programme from the beginning.

Supporting major projects with project management and integrated delivery
THOUGHT LEADERSHIP – NEXT THREE ARTICLES

- Article one
  FEB/MAR 2021
  Mental Health Facilities

- Article two
  MAR/APR 2021
  Mobility in the Post Covid World

- Article three
  APR/MAY 2021
  Building a Resilience Power Supply
THE GRIM YEARS

<table>
<thead>
<tr>
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<th>2008</th>
<th>2011</th>
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<tbody>
<tr>
<td>Construction output</td>
<td>€38.5bn</td>
<td>€9.3bn</td>
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<tr>
<td>Residential completions</td>
<td>78k</td>
<td>7k</td>
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<tr>
<td>Public sector capital programme</td>
<td>€7.9bn</td>
<td>€4.5bn</td>
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After the global financial crisis there was a black hole with minimal construction happening for a number of years.
WHAT DOES GOOD LOOK LIKE

Construction output
10% GDP = €35 bn

Residential dwelling completions
34,000 per annum – Central Bank of Ireland
### 2011 TO 2019

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<tbody>
<tr>
<td><strong>Construction output</strong></td>
<td>€9.3bn</td>
<td>€9.4bn</td>
<td>€9.7bn</td>
<td>€12.7bn</td>
<td>€15.7bn</td>
<td>€17.8bn</td>
<td>€20.9bn</td>
<td>€24.4bn</td>
<td>€27.0bn</td>
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<tr>
<td><strong>Residential completions</strong></td>
<td>6,994k</td>
<td>4,911k</td>
<td>4,575k</td>
<td>5,518k</td>
<td>7,219k</td>
<td>9,886k</td>
<td>14,353k</td>
<td>17,944k</td>
<td>21,133k</td>
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<tr>
<td><strong>Public sector capital programme</strong></td>
<td>€4.5bn</td>
<td>€4bn</td>
<td>€3.4bn</td>
<td>€3.3bn</td>
<td>€3.7bn</td>
<td>€4.1bn</td>
<td>€4.5bn</td>
<td>€5.3bn</td>
<td>€7.4bn</td>
</tr>
</tbody>
</table>

Since 2011/2012 the economy has been improving. Even in 2020 the Irish economy grew despite coronavirus.
2020 OUT TURN

Construction output
€20 bn

Residential dwelling completions
20,000

Public sector capital programme
€9.7 bn
2021 & CIF ESTIMATES

Extended lockdown

Further 800 residential units completions this year lost, per week of lockdown

Further €3 bn reduction in construction output
for 2022 and beyond the outlook is positive for the construction sector.
THANK YOU

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