



Western Development Commission

Submission on the

Northern & Western Regional Assembly Regional Spatial & Economic Strategy Issues Paper

16 February 2018

Key Issues for Northern & Western Regional Spatial and Economic Strategy

The following is a summary of the key points made in response to the questions in the Northern and Western Region *Issues Paper* for the Regional Spatial and Economic Strategy (RSES). It should be noted that in this submission many references are made to the draft *Ireland 2040* the National Planning Framework (NPF) and its contents, targets and objectives. However, as the draft *Ireland 2040* is expected to be significantly revised before publication (after the completion of this submission), it should be remembered that any comments made in the WDC submission in relation to the NPF are provisional.

Overarching issues

Successful implementation of the RSES requires a clear strategy with strong goals and objectives, appropriate resources, a well-developed implementation process and an implementation body with the capacity, resources and powers to achieve co-ordinated action.

Some strategies contain too much discussion of the vision and not enough clarity on how that vision is to be realised in practice. It is important to be clear about the steps which must be taken to make implementation happen, the way in which implementation will be staged and monitored, and to ensure that each place in the Region has the opportunity to achieve its potential. Without such clarity the RSES will not be implemented fairly and evenly.

In order to ensure that Galway city, strategically located regional centres (Sligo and Letterkenny), other towns and rural areas all fulfil their regional development role, with service and infrastructure levels appropriate to each type of area; investment needs to happen in all these places. Too often a strategy is made which is supposed to be for all people and areas, but the focus becomes that of cities and other areas are left without appropriate investment.

Specific details of the role to be played by different areas in the Region's settlement hierarchy and the investments needed for these areas to fulfil their roles must be included in the RSES.

Section 2: People and Places

Population & Employment

The solution to growing the regional population is the availability of employment, which in turn requires supporting policy for infrastructural development, a strategy for education and skills and stimulation of entrepreneurship and enterprise growth. It is important that the Strategy is clearly focused on creating real opportunities to keep people living in the region and to attract more people, whether to cities, towns or rural areas. The Strategy should be appropriately resourced with money, expertise and time, as well as involvement of key stakeholders.

Aligning Population, Employment and Housing Targets

The Draft NPF *Ireland 2040* places significant responsibilities on the Regional Assemblies and the City & County Development Plan process but contains no mention of how they will be resourced to develop or implement the plans, nor what support they will receive or how their decisions will be aligned with sectoral and smaller scale capital spending to ensure implementation of the RSES.

The RSES should be explicit on the jobs targets within the Northern & Western Region and the balance between jobs growth in Galway city, large towns and the rest of the Region. These targets

should be supported by a clear strategy for how employment growth at different spatial scales will be facilitated and supported through the RSES.

Smaller towns of regional significance

The nature and role of the smaller towns including county towns must be considered in more detail in the RSES and in County Development Plans. It is important to be aware, in the context of the Strategy that these towns, as well as being important drivers of their local economy, are also essential to those living in other even smaller, or less serviced towns, in villages or in the wider countryside.

In the Northern and Western Region there are only 5 towns (and Galway city, as well as part of Athlone) which have a population of more than 10,000, yet it is a relatively large region in the Irish context. It is important therefore that the Strategy focuses on the function of towns and the role they play in their hinterland, rather than being too concerned with population size as a criterion for investment.

Smart Places

The combined geography of the WDC and the NWRA represents a population of 1 million people, who reside in a dispersed, rural landscape, on the frontier of Europe. The 'Smart Places' approach builds upon the existing cities approach in order to include our rural landscape & seascape, in order to ensure 'a more balanced pattern of development'. The Smart Places study driven by the WDC and NWRA along with all other stakeholders will consider how this region can develop towards a 21st century Smart future.

Atlantic Economic Corridor and Investment

The draft NPF *Ireland 2040-Our Plan* contains a reference to *incrementally* improving access to the North West but this is not a sufficient commitment. If the North West is to develop and be able to meet its growth targets there must be accelerated investment in infrastructure improving access and connectivity and providing the large towns with the capacity to grow. The Atlantic Economic Corridor process provides a mechanism through which this investment can be prioritised and objectives for the area achieved.

The fact that the RSES will not be finalised and agreed until after the publication of the NPF and the Capital Investment Plan (CIP) is a cause for concern. If the CIP is to be published alongside *Ireland 2040-Our Plan*, but the RSESs are not published for another year, the CIP might not include investments needed to implement the RSES.

Rural Towns and Villages

Although smaller towns can face significant challenges they also have key assets such as cultural heritage, historic buildings, local businesses and high levels of social capital. These all provide opportunities for diversification and adaptation of the town and its social network to embrace future opportunities, whether it is improved tourism product, attracting people to live there, or developing knowledge and sectoral clusters such as creative industries.

Many towns have strong indigenous industries which may be exporting and a substantial number have some foreign direct investment, albeit on a small scale. There are other enterprises and employers too, and important local services sectors and small scale manufacturing serving a local market. These are very significant parts of the local economy and important local employers. All of these can be leveraged to support the development of local communities.

Housing in Rural Areas

It is important to recognise the need for a more flexible approach to planning in remoter rural areas where housing and residence is an important part of maintaining viable communities. However, the

Strategy should set clear overarching policy for one off housing and provide the context for local decisions, as the needs and situation of rural areas can differ widely, but rural housing should not be a solution to urban spill over.

Where housing in the countryside is permitted the landscape effects should be considered carefully and the Strategy should give guidance on principles for housing in the countryside, and how it should be planned, perhaps with clusters or small groups, which would reduce the cost of infrastructure and servicing of the houses with utilities.

Section 3: Our Vibrant Place

Disrupters

One of the characteristics of ‘disrupters’ is that they give rise to *unexpected* economic and social changes. They are, by their nature unpredictable. There must be emphasis here is on developing a ready and responsive region, rather than on predicting change.

It is likely that the development of the Internet of things (IoT), more renewable energy, electric vehicles, driverless cars, changing patterns of ownership (for cars and other assets) the development of 3D printing with impact on local supply chains could all have important consequences for the region in 2040. How we respond to these changes and how well we are positioned in 2020 will all influence future outcomes for the region.

Ways of working are likely to have changed significantly by 2040 in response to a number of different factors. The gig economy and associated self-employment, the rise in global working and digital management of work flows will change the way we work. Similarly social change, for example and changes in the way household function, with more female participation in the workforce, and more equitable sharing of family and homecare responsibilities may also influence work patterns.

Brexit

Brexit is a key strategic issue for the Northern and Western Region. Cross-border linkages including cross-border commuting, access to services, retail and trade are key strategic issues which will undergo massive changes in the context of Brexit. Planning for how to mitigate the impact of Brexit on border communities and the economy of the Border region in particular must be a core priority of the RSES.

Growth

Infrastructure, the ‘3Es’ (Enterprise, Employment and Education) and Innovation are the key levers for effective regional development. When they work together they drive regional growth. Each has a distinctive role, and needs its own policy focus, but they are most effective when addressed through an integrated policy approach.

The Western Region has a number of key regional assets which form part of its ‘value proposition’ as a location to live, work, do business and visit. Other regions have their own unique package of assets. Effective regional development requires harnessing these regional assets.

Sectors which could provide significant opportunities for the region include:

- Creative industries
- Tourism
- Agri-food
- Renewable Energy
- Medical technology

- ICT
- Marine
- Social Economy and Social Enterprise

Broadband access and other communications infrastructure have enabled more varied work practices as well as more varied work locations to emerge. Self-employment, the 'gig' or 'sharing' economy, contract work, freelancing, e-Working, multiple income streams, online business are all trends enabled by new technologies and are dramatically redefining the concept of work, enterprise, and their physical location with more work taking place at home. This trend is likely to continue and presents an opportunity for the Northern & Western Region.

The central aim of the Strategy should be to provide the conditions for the Region, its city, towns and rural areas to grow and realise their full potential. The Northern & Western Region's high quality of life and attractive natural environment make it an attractive location for people to live, work and visit.

The region has strong historical and cultural identity which can form a part of a confident regional identity as well as providing the opportunity to develop regional expertise in local history and local culture, both past and present. Our marine assets are tremendous; tied in with development of ports and harbours and land based transport, there is potential for a significant contribution to the region's economy. Social enterprise and a strong social economy are areas of great potential in the region, creating jobs, providing services and addressing local needs.

Our Natural Place

Transition towards a Low Carbon Economy

The high number of environmental designations should be viewed as key assets on which we can build. Areas of potential include niche eco-tourism, developing an identity for the region associated with high environmental quality and developing tourism options for those with an interest in the area. It is also an important area for the development of research and environmental management expertise and specialisms.

The region is uniquely placed to develop a wood energy sector because it has the forestry resource required to supply market demands, now and in the future. Developing the sector has a potentially important impact arising from its possible longer term role in developing viable economic activity in rural areas. Wood heating makes use of existing natural resources, most of the employment is rural, and the costs of transport mean that the activities tend to be locally based, bringing benefits throughout the region.

The Strategy will provide the context for regional development to 2040 and much of the move to a low carbon economy will take place in that time period. It is important that the Strategy plans for this so that structures are in place for the development of the low carbon practices which will be required. This will mean a clear vision for transport, for industrial development, for energy production and consumption and for agriculture in the region will be necessary. If the Strategy provides direction on this, and local authorities will act in line with the strategy then it will be easier to address these responsibilities for mitigation of climate change and adaptation to its consequences over the longer term.

Marine

Developing our maritime potential needs to be supported by and integrated with land based investment to ensure that the benefits of developments in our island and marine economy are felt among the communities living adjacent to marine opportunities.

The goal to realise our island and maritime potential, makes recognition of the importance of our Atlantic ports essential and policy needs to change to support a greater role for ports such as Galway Port and Killybegs among others.

An Gaeltacht

The areas deemed to be 'Gaeltacht' and their governance under regional and local governance structures needs to be considered, both in terms of the integrity of the Gaeltacht areas covered, their boundaries and also their relationship with English speaking areas. Planning for economic development must address issues of language development as essential to Gaeltacht regions and also address the balance between maintaining social and cultural identity of Gaeltacht regions while avoiding discrimination against those who do not originate in the Gaeltacht.

Greenways

Drivers of the rural economy such as tourism, green products and services and the creative industries need jobs and innovation policies which are cognisant of the particular characteristics of these sectors in rural areas and address the barriers to their growth. At the same time, the sensitive development of our biodiversity, conservation, cultural heritage and landscape assets is important both for our society and for the planning of tourism developments.

Areas with high quality natural social and cultural assets should develop trails or routes which showcase these assets and maximise the experience of the user. Greenways and tourist routes are more than simply a means of travel from start to finish, they provide opportunities for exploring, for stop offs and for deviations from the route. Thus greenways and other routes should always highlight any places of interest, providing the visitor with the option for further exploration if the area of interest is not directly on the route.

Our Healthy Place

Health

Good access to primary, secondary and tertiary health services is very important. Local GP services need to be a focus of health planning, and access to secondary and tertiary health services must be well designed and take full account of the needs of those who are distant from the service. This means there should be good, extensive car parking available at a reasonable price, and for those who cannot drive or be driven, that a co-ordinated travel service for hospital appointments is available. An increase in the number of tertiary clinics held away from the main centres should also be considered so that, where possible, services travel to the people rather than the other way around.

Education

Increasing human capital at a regional level has three key purposes: to provide a skilled labour force; to improve employability and life skills for individuals; and to stimulate entrepreneurship. All three must be seen as priorities when developing regions' human capital. To ensure that upskilling is future proofed and accessible to all in the Northern and Western Region, education and training content needs to be relevant to employers both within the region and to the industries that are likely to establish a base within the region.

Greater collaboration among education and training institutions at all levels and alignment of education and training provision with areas of regional strength and future employment growth, as well as provision of transferable and entrepreneurial skills, will be most effective in enhancing regions' human capital.

A technological university in the region would act as a focal point for applied higher education and training in the region, attracting students and resources and being a facilitating factor in inward economic investment. It would be a dynamic driver in the region creating energy for generation of enterprise, wealth and social and cultural cohesion. It would be a partner with industry and employers in the region, developing applied research programmes, and shared centres of practice as well as providing training and education based on the regions needs and its growth opportunities.

The delivery of education and training is increasingly on a 'blended' basis; part in a classroom, or 'on the job' basis and part on-line and 'remote' from the trainer, usually from home. This online element and increasingly also class based delivery require quality resilient broadband.

Our Connected Place

Public Transport

Some of the analysis on car dependence and car use assumes that the use of the private car is always by choice. Many Western Region residents do not have any choice but to use their car to travel to work, education and health services and retail and leisure activities. Given the service levels within the Western Region, largely only those living in the centres of Galway and Sligo can reasonably expect to access services using public transport and it will likely be only a subset of these will be able to access suitable services to meet their needs

Bus

Investment in infrastructure and services including Bus Stations, Timetabling and ticketing, Rural transport services, PSO services and new transport hubs are all required and are detailed below.

A Review should be undertaken of the entire bus network across the region to identify new service routes and strategic locations for the creation of new, high quality transport hubs which would facilitate passengers to easily switch between services. Improved timetabling and ticketing to encourage greater take-up of this, more sustainable, transport mode.

In the context of Brexit, cross-border bus services must be maintained and if possible services increased to encourage modal shift from car to bus. Current agreements in relation to use of travel passes should also be maintained.

Roads

It is important that we continue to prioritise investment in national roads in line with RSES priorities. This includes investment in motorways in the region and in national primary roads. National secondary routes are critical for inter-regional linkages and ensuring access from rural areas to services and employment in larger urban centres.

We should identify and address emerging bottlenecks/improvements needed to support border communities in light of Brexit and we need to increase regional and local roads funding to allow road maintenance programme to be enhanced and to improve roads that have not been maintained to the appropriate standard.

Soft Infrastructure

Further capital investment in enhancing infrastructure and facilities at NUI Galway, Galway-Mayo Institute of Technology, Institute of Technology Sligo and Letterkenny Institute of Technology is needed to ensure that the full benefit of previous state investment can be realised and that the role of the higher education institutions in economic growth can be maximised. Investment in Further Education and training centres and facilities across the region is also needed to ensure upskilling across all skill levels.

Rail

Rail activity serving the Western Region can be enhanced through a more strategic policy focus, better service levels and additional investment. These include investments to support increased frequencies and service levels and a more competitive fare structure on all routes serving the Western Region, electrification of routes for shorter journey times and emissions savings, in the first instance Dublin to Sligo and Dublin to Galway, thereafter the other routes in the Western Region, passing loops (passenger and freight capacity) in the short-term and double tracking in the longer term to accommodate increased rail traffic. Better and less expensive car-parking facilities would encourage greater modal shift.

The Government committed to a feasibility study in advance of the Mid Term Review of the Capital Plan designed to identify what supports are required to increase the share of rail freight. This study needs to be completed to inform both investment needed to support the current rail freight traffic and the policy decisions to support a greater modal shift to rail freight so as to realise further emissions savings.

Air

Ireland West Airport requires funding for various maintenance and improvements to the main runway, Apron and car parking facilities which are the subject of capital and operational expenditure requests to the Department of Transport, Tourism and Sport. New EU State Aid Guidelines permit additional aid in exceptional circumstances. The Government needs to support Ireland West Airport Knock in seeking approval for a higher aid rate.

There is an increasing focus on regional airports to be commercially independent with declining State aid rates over a 10 year period to 2025. The impact of this needs to be reviewed over the period so as to ensure the continuing viability of airports in the Region. Ireland West Airport Knock and Donegal airport need to be supported to increase patronage levels which in turn will help support the Airports' viability.

Broadband and Communications Infrastructure

The government must ensure the National Broadband Plan NBP (i) is implemented fully (ii) can deliver on planned future EU target speeds by deploying future proofed infrastructure.

The Implementation Group of the mobile phone and broadband taskforce needs to ensure that actions to provide immediate solutions to the broadband and mobile phone coverage deficit in rural Ireland take effect at the earliest opportunity.

There are towns which have not yet had investment in Metropolitan Area Networks (MANs) infrastructure, (fibre rings enhancing broadband capacity in towns). These include Tuam and Westport and should be deployed.

Energy Infrastructure

The WDC regards the provision of quality energy transmission and distribution networks as important elements of the infrastructure required to underpin the economic development of the region. A commitment to investment in energy infrastructure is important to achieving regional development goals through the RSES.

It is important that investments in electricity network reinforcement are made, which will both allow for the transmission of significant amounts of renewable energy from the region, as well as providing high quality electricity infrastructure for enterprise in the region (both existing and potential). Lack of gas infrastructure may become a disincentive to investment, reducing a region's competitiveness and increasing existing disparities. The Strategy needs to be clear about the requirement for natural gas infrastructure in the North West, in particular in the larger towns of Sligo and Letterkenny.

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Introduction

The Western Development Commission (WDC) welcomes the publication of *Regional Spatial and Economic Strategy: Issues Paper* by the Northern & Western Regional Assembly.

The preparation of *Ireland 2040* the National Planning Framework (NPF) and the *Issues Paper* for the Regional Spatial and Economic Strategy (RSES) are landmarks in Irish public policy and it is hoped that it will provide a realistic basis for effective regional development and balancing of development throughout Ireland.

In this submission, the WDC addresses the specific questions posed in the *Issues Paper*, in the order they appear. It should be noted that in this submission many references are made to the draft *Ireland 2040* the National Planning Framework (NPF) and its contents, targets and objectives. However, as the draft *Ireland 2040* is expected to be significantly revised before publication (after the completion of this submission), it should be remembered that any comments made in the WDC submission in relation to the NPF are provisional.

About the Western Development Commission

The WDC is a statutory body established by government to promote, foster and encourage economic and social development in the Western Region. It operates under the aegis of the Department of Rural and Community Development (DRCD). The WDC works in co-operation with national, regional and local bodies, including the NWRA, involved in western development to ensure that the Western Region maximises its full development potential. It does this by:

- analysing economic and social trends and making policy recommendations;
- promoting the Western Region through the LookWest.ie campaign;
- supporting the rural economy through facilitating strategic initiatives (e.g. renewable energy, creative economy, rural tourism); and
- providing risk capital to businesses through the WDC Investment Fund.

One of the functions of the WDC is regional policy analysis. The WDC seeks to ensure that government policy reflects the needs and maximises the potential of the Western Region in such areas as infrastructure, natural resources, enterprise and rural development. It also tracks the implementation of policies and recommends adjustments as appropriate. This means that the organisation has a well thought out approach to regional development and issues for rural regions which has informed the preparation of our submission.

The Western Region is a predominantly rural region; almost two thirds of the population live outside settlements of 1,500 people (Census of Population, 2016). Because of this, the WDC is particularly cognisant of the impact of any changes in government policy on rural areas. The region has four National Spatial Strategy (NSS) gateways (Letterkenny, Sligo, Galway and Shannon (part of the Limerick/Shannon gateway)) and part of Athlone, (which was in the Athlone, Tullamore, Mullingar gateway), and three hubs (Ballina/Castlebar, Tuam, and Ennis). There are also other towns which are involved in driving local development, and which are important local economic centres in areas distant from larger centres.

Contact Details

We are pleased to have the opportunity to make this submission and would be happy to expand on any points made if the Assembly or RSES team requires more information, supporting data or clarification. For queries please contact:

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Joint Foreword (Issues paper)

How do we enable the Regional Assembly implement these ambitious strategies and what structures should be put in place?

Key Points:

Successful implementation of the RSES is dependent on the development of a clear strategy with strong goals and objectives, appropriate resources, a well-developed implementation process and an implementation body with the capacity, resources and powers to achieve co-ordinated action.

Some strategies contain too much discussion of the vision and not enough clarity on how that vision is to be realised in practice. It is important to be clear about the steps which must be taken to make implementation happen, the way in which implementation will be staged and monitored, and to ensure that each place in the Region has the opportunity to achieve its potential. Without such clarity the RSES will not be implemented fairly and evenly.

In order to ensure that Galway city, strategically located regional centres (Sligo and Letterkenny), other towns and rural areas all fulfil their regional development role, with service and infrastructure levels appropriate to each type of area, investment needs to happen in all these places. Too often a strategy is made which is supposed to be for all people and areas, but the focus becomes that of cities and other areas are left without appropriate investment.

Specific details of the role to be played by different areas in the Region's settlement hierarchy and the investments needed for these areas to fulfil their roles must be included in the RSES.

Successful implementation of the RSES is dependent on the development of a clear strategy with strong goals and objectives, appropriate resources, a well-developed implementation process and an implementation body with the capacity, resources and powers to achieve co-ordinated action.

It is important that, in addition to providing a vision for development in the NWRA Region, clear practical information is given on the types of development that can be expected in different areas and the way this will benefit the Region.

Some strategies contain too much discussion of the vision and not enough clarity on how that vision is to be realised in practice. It is important to be clear about the steps which must be taken to make implementation happen, the way in which implementation will be staged and monitored, and to ensure that each place in the Region has the opportunity to achieve its potential. Without such clarity the RSES will not be implemented fairly and evenly.

In order to ensure that Galway city, strategically located regional centres (Sligo and Letterkenny), other towns and rural areas all fulfil their regional development role, with service and infrastructure levels appropriate to each type of area, investment needs to happen in all these places. Too often a strategy is made which is supposed to be for all people and areas, but the focus becomes that of cities and other areas are left without appropriate investment.

Specific details of the role to be played by different areas in the Region's settlement hierarchy and the investments needed for these areas to fulfil their roles must be included in the RSES.

Clear Roles and Responsibilities

For successful implementation it is important that the Regional Assembly has very clear responsibility for the delivery of the RSES and that there is a designated budget to help achieve its implementation. There must be clarity about the division of roles and responsibilities between the

Regional Assembly and the national body with responsibility for implementation of the NPF (Department of Housing, Planning & Local Government or Department of An Taoiseach).

Consistency through National, Regional and Local Level

While the RSES is a regional strategy, its success will very much depend on decisions made at central Government level, on national sectoral policy and the decisions of state agencies and bodies with a national remit, as well as those of private sector investors. Much of the control over its implementation will be at a national level.

Unfortunately the draft NPF contains very little information about the relationship between implementation of the NPF at national level and the RSES at regional level. How will the RSES fit into the Framework? What is the role of the Regional Assembly? Will the three RSES be regarded as separate strategies or integral elements of the NPF?

As well as the relationship between the RSES and the NPF, the RSES also has relationships with county and local plans (County Development Plans, Local Economic & Community Plans, Local Development Plans) and its implementation will be spread from national, to regional to local level (at Local Authority, but also at local community level). This is a challenging position for the RSES and the Regional Assembly, to reconcile national, regional and local objectives. The RSES's relationship with all these elements needs to be made clear.

Alignment with Sectoral Policy and Agencies

As the RSES is a broad strategy, with long term goals and practical implications for regional development, a wide range of organisations, as well as the NWRA, must be involved in its implementation. These include:

- National government – political level
- Department of Finance/ DPER
- NPF lead Department (D. Taoiseach/ DHPCLG)
- Other Government Departments
- Other Regional Assemblies
- Local Authorities
- IDA, Enterprise Ireland, LEOs, Údarás na Gaeltachta
- Fáilte Ireland
- HSE (Tertiary and Community Care decision making)
- Education – 2nd level, higher (IOEs and Universities), further education and training (ETBs)
- Transport providers – national and regional, public and private
- Private sector decision-makers

If the goals and priorities of sectoral agencies are not aligned with RSES then implementation will be difficult if not impossible. But achieving this alignment, and at the same time achieving strategic spatial goals, will be complex. Such organisations have other responsibilities and are dealing with other issues in terms of their service and investment plans. They may find that what is appropriate for their function is not in line with the RSES. If the RSES is to succeed there needs to be a mechanism for resolving or considering such conflicts to ensure that they are not ignored, but so that appropriate decisions are made by the responsible organisations.

Successful implementation requires that investment and policy decisions across State and semi-State organisations are in line with the RSES rather than operating in opposition to it. While it is important to consider how implementation will work it is also important to recognise that while RSES strategic

spatial planning may be considered an ideal, it is sectoral planning and policy that, for the moment and for the foreseeable future, is the real driver of regional development.

Certainty of Funding and Investment

The primary source of funding for achieving regional development will be the National Exchequer. The only way that the RSES can be successfully implemented is for Departmental and State and Semi-State Agency expenditure decisions and allocations, including the National Investment Plan, to be fully aligned with the spatial priorities outlined in the RSES. In the absence of alignment of Exchequer funding with the NPF and RSES, they cannot succeed.

Sufficient funding must be available for investment in needed infrastructure and facilities to ensure that the areas designated by the RSES can grow. Investments need to be planned over the long term and there has to be certainty that in the medium and longer term the required investments will be made. There will be concerns about both the short and long term availability of funding to ensure implementation and this uncertainty could also affect implementation. The cancellation of the planned Gateway Innovation Fund contained in the NDP 2007-2013 is a case in point.

Public investments of a 'national' nature which are mainly located in the Capital contribute strongly to its economic growth and primacy. The relocation of some of these 'national' investments to the NWRA Region and/or decisions to locate new 'national' investments outside the Capital, would help ease congestion, bottlenecks and contribute to the counterbalance to Dublin's growth sought by the NPF. A more central location may also be more accessible to more of the national population. Public investment can either reinforce the 'business as usual' scenario or be used as a tool to achieve the priorities of the RSES for more effective regional development.

While the Draft NPF and RSES posits the idea of regions making the most of their assets and opportunities and 'bottom-up' development, the very low levels of funding available at local and regional government level in Ireland to invest and drive regional development goals, which have been locally developed, is a substantial barrier to achieving this. Reforming administration and governance structures to provide more autonomy at regional and local government level and support to enhance governance and leadership is required to effectively implement the RSES.

Effective Monitoring

Reference is made (page ii) to monitoring of the RSES through an agreed set of key indicators. The WDC agrees that this is critical and the development of a shared consensus on the indicators to monitor progress could assist in creating buy-in from stakeholders. It is unfortunate that the *Issues Paper* does not contain further detail on potential indicators.

Measuring the successful implementation of the RSES will need focus on measuring outcomes at a regional and sub-regional level and indicators need to be devised and used to benchmark and monitor progress. The case for monitoring and measuring outcomes at regional and sub-regional levels is even more important where investment has been spatially targeted.

The WDC believes that progress toward achieving the RSES, recognising its multi-dimensional nature, should be monitored by assessing trends across a range of themes, using a range of social and economic indicators. These include demographics (population share and growth), labour market (employment share and growth), economic structure (the sectoral composition of employment), and output and its regional dispersal.

Improved spatial distribution of economic activity is a part of effective regional development but not the only part. Other indicators that are important include income per capita, poverty, unemployment, social inclusion and inequality, educational participation and attainment as well as

levels of innovation. Indicators such as access to health services, a quality environment and improved quality of life are also important facets of effective regional development.¹

What should be the guiding principles of the RSES?

- Modern approach to regional development taking account of the needs of cities, towns and rural areas
- Focus on high value-added enterprise and high skill jobs, not just for cities but for towns and rural areas too.
- Recognise and support the role and significance of lower-skill, employment-intensive sectors.
- Infrastructure investments appropriate to scale.
- Connectivity
- Focused and realistic
- Practical focus on effective implementation

¹ Some, such as quality of life indicators are as of yet poorly developed while others such as environmental emissions or noise quality are less relevant in the context of balanced regional development and may be more appropriately analysed in a rural/urban context. Others are omitted because of limited data at a regional level. For example the EU publishes *Regions: Statistical Yearbook* annually, which includes a wide range of regional statistics from demographic data to statistics on health and transport access however these are only at NUTS2 level.

Section 2: People and Places

Population & Employment

Q.1. How do we achieve our population ambitions? How do we encourage population and employment growth to the City Regions and Large Towns, to enable them to perform as key national and regional economic drivers? How can they be addressed and by whom?

Key Points:

The solution to growing the regional population is the availability of employment, which in turn requires supporting policy for infrastructural development, a strategy for education and skills and stimulation of entrepreneurship and enterprise growth. It is important that the Strategy is clearly focused on creating real opportunities to keep people living in the region and to attract more people, whether to cities, towns or rural areas. The Strategy should be appropriately resourced (with money, expertise and time, as well as involvement of key stakeholders).

The Regional Spatial and Economic Strategy for the Northern and Western Region has the responsibility of meeting the targets set out in the draft National Planning Framework (NPF) *Ireland 2040*. The North West probably has the most challenging targets to meet in terms of population growth with a target of a population increase of 150-175,000 people and 110,000 jobs in the region.

However, when broken down into annual growth rates over the next 21 years (2019-2040) the targets appear more manageable. For example the target that larger towns should grow by 40% to 2040 is an annualised growth rate of 1.62% p.a. for 21 years while rural population growth of 15% over the period amounts to less one percent (0.67%) annual growth. Galway, which has the largest growth target of 50-60% to achieve a population of 124,000 can do this with an annual growth rate of 2.1%.

Nonetheless these are ambitious targets and achieving them will need significant resources and direction, none of which are identified or set out in the Draft NPF *Ireland 2040*. It also places a significant responsibility on the NWRA in particular and the significant urban centres of Galway Sligo and Letterkenny, as well as other large towns, as the key drivers in the region.

Some of these urban centres, which are targeted for 40% growth in the NWRA area, are not very well connected, though they may be well located to serve as a driver for their region. These towns need their connectivity improvements prioritised so that they have some chance to achieve the planned targets.

The North West, from north of Galway up to Donegal, urgently needs an urban centre that can more effectively drive development than heretofore. This is even more important given the difficulties and challenges now being faced by Border counties arising from Brexit. Sligo is the best located large urban centre to support development throughout much of the North West region. With effective linkages to other urban centres throughout the region and improved connectivity, along with support from the regional and national stakeholders, Sligo can become a more effective regional driver, supporting a greater share of population, economic and employment growth within Sligo and within the wider North West region. Sligo (despite deficiencies) already has significant infrastructure endowment and with some further investment will have significant additional capacity to serve greater population and economic growth in the NWRA Region.

Letterkenny is a very important urban centre in the North West, with strong links across the Border and to Derry in particular. Its development will help mitigate the negative consequence of Brexit along the Border. **Towns close to the border face a complex situation. Letterkenny** is an important

local service centre for remote parts of Donegal and at the same time it is close to the City of Derry. The two have worked well together to develop a thriving hinterland in the North-West City Region. Both of these functions are important to the role of Letterkenny as a regional driver.

The promotion of Sligo as a key driver in the North West will, along with continuing support of Letterkenny, its development will help mitigate the negative consequence of Brexit along the Border. **Towns close to the border face a complex situation. Letterkenny** is an important local service centre for remote parts of Donegal and at the same time it is close to the City of Derry. The two have worked well together to develop a thriving hinterland in the North-West City Region. Both of these functions are important to the role of Letterkenny as a regional driver.

The WDC believes that the larger regional towns can be developed more and have untapped potential, however better intra-regional linkages are needed. The motorway network is focused on linkages to Dublin rather than between other cities and towns. Part of the reason for Dublin's success has been the effective linkages from all regions to Dublin – radiating from all parts of the country to the Capital (discussed in Infrastructure section) which has helped support the efficient movement of goods and people to the Capital.

Galway is the only built-up area which has experienced consistent population growth in excess of the national average (31%) from 1996-2016, with population growth of 41%. Galway has appeal as a significant attractive alternative urban centre to Dublin, albeit on a smaller scale. One of the often cited positives of Galway is its quality of life and this along with good employment opportunities and strong educational and health facilities has helped Galway enjoy strong population growth. Galway is also the only urban centre in the West/Northwest with a university and has a centre for excellence in healthcare. Galway therefore had key infrastructural capacities which enable it to become an effective regional driver. This has further supported the capacity of the city to attract mobile investment and employment opportunities which has attracted labour supply from across the Northwest. Clearly Galway needs further investment in travel and liveability infrastructures if it is to reach its growth target, but the experience of Galway's development shows that rapid growth of larger towns can be achieved. Larger towns in the region do have capacity to grow given the resources and more effective linkages between them.

As will be noted throughout this submission, employment is key to maintaining and growing population. It is the availability of employment which will reduce out migration and attract people to live in the region. It is important that the Strategy is truly focused on creating real opportunities for the people who live in the regions, whether in cities, towns or rural areas. However, to create employment we need to focus on the enablers of employment including infrastructure, as well as developing enterprises and entrepreneurship, education and skills.

It should be remembered that during the early part of this century (2000-2007) when there was rapid growth throughout Ireland rural areas responded rapidly with significant increases in the numbers employed and in workforce participation and, in turn, in local populations. Clearly the region is ready to respond and targeted policies to stimulate employment and entrepreneurship will help to achieve targets.

Ensuring growth

As migration is the key cause of rural population decline, the focus should be on enterprise and employment and education opportunities in the region both to reduce outmigration and attract people to live in the region.

Alongside the need for employment, the region and its large towns also face infrastructure and service deficits such as poor public transport and often a low quality road network and difficulties in much of the region in accessing education services at university level. There is often a mismatch

between supply of education and demand for people with that education. There is a tendency for those who have higher educational qualification to migrate or remain away from the rural area after attending higher education. Parts of the region do not have the job opportunities to attract many highly skilled people, but without these people it is harder to develop these opportunities. For this reason, and for others, public sector employment can be particularly important.

Infrastructure assets can both reflect and influence the viability of a region. At the most basic level a good road network, commensurate with the population and demand level, is essential to allow people to travel to work, and to their markets, to access services and to make the area accessible to other. Similarly, public transport is also key. Access to the rail and intercity bus network is essential but it is important that transport services are integrated with each other.

Modern ICT infrastructure is a prerequisite for economic and social development in the region. Technology provides us with opportunities to work in a variety of locations and to market and sell our work and place. While this has not yet had the significant effect on rural regions and rural employment opportunities that had initially been envisaged, with improved ICT alongside a concerted effort to develop and promote alternative forms of work and remote working, the potential for the development of employment, economy and society and so to achieve population growth targets. Quality energy networks will also be essential to regional growth. The key actions required to achieve the population growth targets are discussed in more detail throughout this submission in response to other more detailed questions.

Conclusion

The solution to growing the regional population is the availability of employment, which in turn requires supporting policy for infrastructural development, a strategy for education and skills and to stimulate entrepreneurship and enterprise growth. It is important that the Strategy is clearly focused on creating real opportunities to keep people living in the region and to attract more, whether to cities, towns or rural areas.

The Strategy should achieve improvements in people's quality of life as well as their economic and social opportunities. It should be appropriately resourced (with money, expertise and time, as well as involvement of key stakeholders). It is better to have a more focused, limited strategy that can be implemented than a vision which is beyond the possibility of effective implementation.

Implementation will require coordination with central government, local authorities, enterprise agencies, some elements could be co-ordinated through the Action Plan for Jobs and the Action Plan for Rural Development or using similar multi agency targeted approaches. The involvement of education providers, employers and people in the region will all be needed to ensure the targets are achieved.

Q.2. Can we identify propositions within cities, urban areas, or, well connected towns that are suitable for strategic employment growth? What are the barriers to their delivery and how can barriers be removed?

Key Points:

The Western Region has a number of **key regional assets** which form part of its 'value proposition' as a location to live, work, do business and visit. Other regions have their own unique package of assets. **Effective regional development requires harnessing these regional assets.** For the Western Region they include:

- Quality of life
- Attractive natural environment
- Strength in manufacturing
- Opportunities in the ICT sector to both support other growth areas and to driver economic growth itself
- Strength and vibrancy of Galway city
- Growth potential of other regional centres
- High level of self-employment and self-motivation
- Abundant renewable energy potential
- World-leading medical technology cluster
- A number of internationally significant tourism locations
- International and regional airports
- Extensive and 'green' food production system and marine resource
- Strong creative sector including links with arts, culture and heritage
- Significant opportunities for further development of the social economy and social enterprises

Regional Value Proposition

The Northern & Western Region has a number of key regional assets which form part of its value proposition as a location to live, work, do business and visit. The RSES needs to harness these regional assets set out in the box above.

The Northern & Western Region's high quality of life and attractive natural environment make it an attractive location for people to live. The WDC's LookWest.ie campaign has, over the past 13 years, highlighted many case studies of people and businesses that have located in, or returned to, the Western Region due to its quality of life. People have chosen to live in the Western Region for a range of personal and social reasons.

For people (re)locating in the region, a primary, but not the only, determinant is employment. The nature of employment has been, and continues, to change with increasing locational flexibility. With one in five people in the Western Region self-employed, entrepreneurship has been a key route for many people to locate in the Western Region, and particularly in areas outside of Galway city.

The region's strong manufacturing base is another critical regional asset. The region is home to an internationally renowned medical technology cluster which, while focused in Galway city, extends across all counties. This cluster should be highlighted and facilitated to evolve through the RSES.

The promotion of Sligo as a key driver in the North West will, along with continuing support of Letterkenny, help mitigate the negative consequence of Brexit along the Border. **Towns close to the border face a complex situation. Letterkenny** is an important local service centre for remote parts of Donegal and at the same time it is close to the City of Derry. The two have worked well together

to develop a thriving hinterland in the North-West City Region. Both of these functions are important to the role of Letterkenny as a regional driver.

More effective intra-regional linkages, supporting transport between these centres will facilitate strategic employment growth as well as extending the labour catchments for employers in these centres. There is already strong evidence indicating the increased commuting flows between Limerick and Galway, arising from the employment opportunities in both centres, as well as opportunities in the Shannon enterprise zone. It will be important to ensure that there are improved linkages from Galway north to Sligo and Letterkenny to support the NWRA Region and inter-regional commuting.

This is not to suggest that intra-regional commuting will become the main feature of labour flows but it can improve the appeal of these regional centres in attracting and retaining quality labour supply which is an important factor in supporting larger enterprise investments (foreign or indigenous). It should also be noted that these distances (e.g. between Sligo and Letterkenny) are relatively short in comparison to the extensive labour catchment of the GDA and its commuter belt.

By improving these links between centres an alternative large labour catchment is available in Ireland. The international evidence suggests that policy can effectively influence the location of FDI. Research in the UK has found that regional policy can and did effectively alter the location of FDI in favour of the north. However when the policy weakened, investment reverted to an earlier location pattern. This shows that regional policy can alter the location decisions of mobile investment but to maintain effectiveness policy needs to continue to be regionally focused².

Of course the size of investment is relevant. Not all centres can or should compete for very large scale investments. While the larger city regions outside of Dublin are now the focal points for internationally mobile investment, it should be noted that it is not only the City Regions that successfully attract FDI. There have been significant recent investments in smaller centres too, some examples from 2017 include: Element Six based in Shannon, Co Clare; Beckman Coulter based in Lismeehan, Co Clare; BorgWarner based in Tralee, Co Kerry.³

The social economy and development of social enterprises also offer significant opportunities for the region as drivers of development, creating jobs and providing services and addressing local needs. The social economy in the region is already an important asset of the region with a significant involvement in health and social care service provision, banking services through the credit unions and through the co-operative movement the development of agribusiness. There is potential to build on current experience in the area, by supporting social enterprises and enabling partnerships with the public sector and with private enterprise.

Social economy enterprises and organisations take many different forms but the local roots of many enterprises enables them to meet local needs and to support local communities through services provision, production and education. Developing the social economy will ensure that jobs will be created in community-based and community-run social enterprises. Some social enterprises will provide goods and services to the community on a commercial basis. Others will contract the delivery of public services. Social enterprises operate in many fields and usually work most effectively in a niche where there is a local need they can meet.

Under the Action Plan for Rural Development the Government is to develop and publish a National Policy on Social Enterprise under this Pillar which will encompass the full range of activity in this

² Wren, C. and Jones, J. 2012, *FDI Location across British Regions and Agglomerative Forces: A Markov Analysis*, Spatial Economic Analysis, June 2012. http://www.wdc.ie/wp-content/uploads/WDC_Policy-Briefing-no-6-Commuting-Final.pdf

³ <https://www.idaireland.com/newsroom/end-year-results-2017>

sector and through the Social Inclusion and Community Activation Programme (SICAP), support the establishment and development of social enterprises in rural areas.

Q.3. How do we ensure population, housing and employment targets align with the sustainable growth needs of the region and remain aligned with the NPF?

Key Points:

The Draft NPF *Ireland 2040* places huge responsibilities on the Regional Assemblies and the City & County Development Plan process but contains no mention of how they will be resourced to develop or implement the plans, nor what support they will receive or how their decisions will be aligned with sectoral and smaller scale capital spending to ensure implementation of the RSES.

The RSES should be explicit on the jobs targets within the Northern & Western Region and the balance between jobs growth in Galway city, large towns and the rest of the Region. These targets should be supported by a clear strategy for how employment growth at different spatial scales will be facilitated and supported through the RSES.

The Draft NPF sets hugely ambitious growth targets for the Northern & Western Region. The target of 40% population growth in towns of 10,000+ population in the NWRA Region, almost twice projected national population growth, places considerable pressure and responsibility on both the RSES and the NWRA. In contrast, for the Eastern & Midlands Region and the Southern Region, which have stronger urban structures and infrastructural endowments, towns of 10,000+ are only targeted to grow by 20-25%.

While we recognise that higher growth targets for large towns in the NWRA Region are intended to facilitate a 'catching up' in order to strengthen the region's urban structure, the Draft NPF does not outline any specific initiatives or funding to allow these hugely ambitious targets for the Northern & Western Region to be met. Indeed it even states that inter-regional connectivity for the West and North West, critical to growth of towns in this area, will become a priority only after urban consolidation/compact growth in the five cities is achieved (see Section 9 of Draft NPF), which raises the question of how exactly regional centres in the Northern & Western Region could possibly meet these highly ambitious targets.

The Draft NPF *Ireland 2040* places huge responsibilities on the Regional Assemblies and the City & County Development Plan process but contains no mention of how they will be resourced to develop or implement the plans, nor what support they will receive or how their decisions will be aligned with sectoral and smaller scale capital spending to ensure implementation of the RSES.

While the regional targets for population and housing outlined in the Draft NPF are differentiated between the cities and towns (Table 2.1, page 39), the regional jobs targets are not. The target of 110,000 new jobs for the Northern & Western Region set out in the Draft NPF and RSES Issues Paper is not divided among the city, towns and rural areas of the region.

The only spatial differentiation of the jobs targets is that at least 50% of national growth will occur in the five cities and their suburbs with around 66% in the cities, their suburbs and a number of 'large regionally distributed towns and their environs to be identified through the RSES' (National Policy Objective 2b). If for example the RSES process selected all large towns (10,000+) then the target would be for 16% of national jobs growth to be spread across 41 towns nationally.

The RSES should be explicit on the jobs targets within the Northern & Western Region and the balance between jobs growth in Galway city, large towns and the rest of the Region. These targets

should be supported by a clear strategy for how employment growth at different spatial scales will be facilitated and supported through the RSES.

Q.4. Are there towns below the population threshold of 10,000 that have a role and function that represent potential regional growth drivers? Where are they located? Explain why you consider that they exhibit these attributes and how the RSES could best offer support to them.

Key Points:

The nature and role of the smaller towns including county towns must be considered in more detail in the RSES and in County Development Plans, but it is important to be aware, in the context of the Strategy that these towns as well as being important drivers of their local economy are also essential to those living in other even smaller, or less serviced towns, in villages or in the wider countryside.

In the Northern and Western Region there are only 5 towns (and Galway city, as well as part of Athlone) which have a population of more than 10,000, and yet it is a relatively large region in the Irish context. It is important therefore that the Strategy focuses on the function of towns and the role they play in their hinterland, rather than being too concerned with population size.

The definition of rural areas as outside towns with a population of 10,000 covers 80% of the population in the Western Region and 50% nationally. These are many significant towns which place a crucial role in their region and locality and which need to be the focus of appropriate development and investment. Towns at a distance from cities provide a wide range of services and will continue to do so in the future. They are Infrastructure hubs, with road and rail links, bus services and terminus and they are key centres of local economic activity often being homes of larger employers located in them for historical reasons or because it is easy to attract employees.

Some of the larger regional towns are quite close to cities (Ennis for example) and can benefit from good connectivity and economic spill overs. Other towns are more distant. For example Ballina and Castlebar, as well as being important employment and economic centres, also provide services for large remote hinterlands which are very distant from cities.

While there might be clear differences in relation to the provision of specialist healthcare or universities in cities rather than towns, given distance the large towns discussed above have very important roles in terms of services, for example in health and education, leisure and entertainment, personal and financial services and, of course, retail facilities.

Some of these services are also provided in smaller towns, especially those at a distance from cities and larger towns. The nature and role of the smaller towns including county towns must be considered in more detail in the RSES and in County Development Plans, but it is important to be aware, in the context of the Strategy that these towns as well as being important drivers of their local economy are also essential to those living in other even smaller, or less serviced towns, in villages or in the wider countryside. The connection of these towns into local infrastructure is very important, with good road access, bus services and leisure facilities all essential to the local population.

The population of towns is a simple measure to use when designating their status or importance but other factors are also very important. If a large town (over 10,000 population) is in the vicinity of a city it will have far fewer functions and activities than a similar sized or significantly smaller town which is distant from a city or large town.

In the Northern and Western Region there are only 5 towns (and Galway city, as well as part of Athlone) which have a population of more than 10,000, and yet it is a relatively large region in the Irish context. It is important therefore that the Strategy focuses on the function of towns and the role they play in their hinterland, rather than being too concerned with population size.

While clear designation of key towns (in addition to those with a population above 10,000) is essential to prioritise development in the region, it should be remembered that not all towns will require the same levels of investment or can be expected to provide the same levels of service. Some towns are crucial in their locality for various reasons. County towns provide key local services while other towns, by virtue of their distance from other urban centres, must provide a range of services.

A number of towns are suggested for particular focus, but the list is not definitive, and it should be noted that in this submission we are only discussing the area under the WDC remit (and therefore do not refer to Cavan or Monaghan). These are:

- Roscommon town (5,876⁴)
- Carrick on Shannon (4,062)
- Clifden (1,597)
- Belmullet (1,019)
- Buncrana (6,785) or Carndonagh (2,471) on the Inishowen peninsula.

While these are examples of towns which may need to be given specific consideration, decisions about promoting towns as key drivers or as local service centres should be made in partnership with the Local Authority.

⁴ Populations from Census of Population 2016

Regional Initiatives

Q.5. Is there an opportunity to develop this region as a SMART Region and how can this be best achieved and by whom?

Key Points:

The combined geography of the WDC and the NWRA, represents a population of 1 million people, who reside in a dispersed, rural landscape, on the frontier of Europe. The 'Smart Places' approach builds upon the existing cities approach in order to include our rural landscape & seascape, in order to ensure 'a more balanced pattern of development'.

The Smart Places study driven by the WDC and NWRA along with all other stakeholders will consider how this region can develop towards a 21st century Smart future.

As countries, cities and regions become more connected, this brings innovation & digitisation into all aspects of our work and home life. Smart technology and smart approaches are now pervasive to considering our societal and economic challenges, as well as to continued growth of our knowledge economy. Smart initiatives are a requirement to keep pace with the 21st century development. A Smart regional approach requires a collective framework, in order to set out a vision, and to build momentum behind the initiative.

At the Smart Cities conference at Insight Research Centre at NUI Galway in 2016, the WDC partnered with Northern Western & Regional Assembly, and the Insight Research Centre, NUI Galway to undertake an evidence-led scoping study, in order to document the opportunity for our region with a largely rural and geographically dispersed population to participate in the global Smart movement and the economy of Smart opportunities and the progress of the Smart Cities initiative in our traditional centres of population.

The 'Smart Places', regional scoping study is considering who are the key stakeholder groups, which could support a systematic approach towards a Smart Regional programme. In identifying the key stakeholders in the Public sector – WDC, NWRA and private sector – individual business, chambers, social enterprises, Community, Academic – research centres & academics, the regional scoping study will consider the stakeholders, partnership(s), coalitions, relationships, which are critical in realising a Smart Region Strategy & Vision.

Smart Places is a first look in considering our smart regional position. This regional partnership will consult, engage and query how we can align resources towards a transformation process in order to achieve a Smart vision for our rural region. The Smart Places study will consider the national and EU smart policies, actions, priorities, to build upon our competitive advantage and to reflect our geographic population and place, in order to consider how this region can develop towards a 21st century Smart future.

Q.6 (i) Where are the regionally significant locations for investment concentration? Where are the most suitably available development lands, strategic site and commercial properties, taking consideration of matters including:

- a. Employment location, density of workers**
- b. Locations for expansion of existing enterprises**
- c. Serviced and ready sites**

Key Points:

The regionally significant locations for investment concentration will be those centres with the highest density of employment concentration along with key strategic sites based on available infrastructure and natural resource potential.

The regionally significant locations for investment concentration will be those centres with (i) the highest density of employment concentration along with (ii) key strategic sites based on available infrastructure and natural resource potential.

- (i) Those centres with the highest density of employment concentration are the labour catchments of Galway, Letterkenny, Sligo, Castlebar, Ballina, Athlone and Cavan.

Drawn from forthcoming WDC analysis of labour catchments in the Western Region, the labour catchment of a town is that area from which a town draws most of its workforce.

Within the WDC region, the Galway City labour force catchment is by far the largest with 70,170 people living within the catchment and at work (55.3% actually employed within Galway City). This catchment accounts for 26.9% of the total population at work and residing within the Western Region and is larger than the labour catchments of Sligo, Ennis and Letterkenny combined.

Sligo has the second largest labour catchment in the Western Region with a population at work of 21,834, in Census 2016. Sligo town's influence as a place of work extends over a large area and extends into parts of north Leitrim and the very southern portion of Donegal. In general, Sligo is a very important job location for the region but its influence is mainly within county Sligo and the immediate hinterlands in north Leitrim.

The total resident and 'at work' population within the Letterkenny Labour Market is 19,717 (7.6% of Western Region) and is the fourth largest in terms of population size with only Ennis, Sligo and Galway City with larger labour catchments. Letterkenny's influence as a place of work extends over a large area but is completely confined within the local authority area of Donegal. Commuter flows from the Letterkenny labour catchment to Northern Ireland and Derry county account for close to 1,000 workers (957), indicating the importance of cross border travel for work and Brexit implications.

It is also important to note that within the larger labour catchments there can be smaller embedded labour catchments. For example within or adjacent to the larger Galway City labour catchment the towns of Tuam, Ballinasloe, Loughrea and Gort have their own labour catchments, though they are relatively small. For residents of these four smaller labour catchments, Galway City is an important, but secondary employment destination. These smaller labour catchments can draw on the wider labour supply available within the Galway labour catchment.

- (ii) Strategic sites based on available infrastructure and resource potential.

Logistics and supply chain activities: Ireland West Airport, Donegal airport. Sites adjacent to significant road and rail interchanges, for example the Rathmorrissey interchange at the intersection of the M6 and M18.

International tourism access: Ireland West Airport, Donegal airport, Galway Port and Killybegs (cruise Traffic).

Marine: Ports, especially Galway, Shannon Foynes Port and Killybegs along with Rossaveal, Belmullet and other centres to support renewable energy exploration and development.

Tourism development: Harbours and Ports and airports.

The ICT sector and broadband intensive sectors: MANs infrastructure and connectivity to international access points. E.g. Killala Aquacomms transatlantic link.

Improved intra-regional routes such as the M18 can improve the accessibility of various regional centres to suppliers and customers and extend their geographical catchment. Improved accessibility to international connections such as airports and ports also enhances the appeal of these regional centres as locations for further investment, both indigenous and foreign.

Improved transport links also extend labour catchments in improving accessibility to specific centres but also reducing the journey times between adjacent centres which can allow overlapping labour catchments to emerge. For example, the M18 has improved journey times between Galway and Shannon so now these distances (e.g. between Galway and Shannon) are relatively short, especially in comparison to the extensive labour catchment of the GDA. By improving the links between centres, companies with specific skill requirements can tap into adjacent labour markets while dual income households have more choice of employment options.

This is also a key priority for realising the initiative to develop an Atlantic Economic Corridor (AEC), to link the Mid-West, West and North West is upgrading of the transport links across the area (see below).

(iii) How can competitively priced development lands be provided

Local authorities have a role to play in helping to make competitively priced lands available. Ensuring sites are serviced with water, waste water facilities, good road access and high speed broadband will be important. This will support the IDA strategy of identifying advance sites and Enterprise Ireland and other state agencies to identify appropriate sites for their clients.

Q.7. How can the Atlantic Economic Corridor (AEC) be developed as a value proposition for the region? Who are the drivers for its development and what barriers may exist that need to be negotiated?

Key Points:

The current draft NPF *Ireland 2040-Our Plan* contains a reference to *incrementally* improving access to the North West but this is not a sufficient commitment. If the North West is to develop and be able to meet its growth targets there must be **accelerated** investment in infrastructure improving access and connectivity and providing the large towns with the capacity to grow. The Atlantic Economic Corridor process provides a mechanism through which this investment can be prioritised and objectives for the area achieved.

The fact that the RSES will not be finalised and agreed until after the publication of the NPF and the CIP is a cause for concern. If the CIP is to be published alongside *Ireland 2040-Our Plan*, but the RSESs are not published for another year, the CIP could possibly exclude investments needed to implement the RSES.

The Atlantic Economic Corridor (AEC) is an initiative of the Chambers of Commerce of Tralee, along the Western coast, and the American Chamber of Commerce. The objective is the development of an Atlantic Economic Corridor, with a 'city of scale' from Kerry to Limerick through Galway to Sligo, to match Dublin and Cork in success in developing infrastructure, attracting Irish and multi-national investment, and growing jobs and wealth in vibrant communities.

The AEC recognises that there is a need for an integrated approach to long-term economic planning. The AEC recommends a phased approach, with an immediate focus on the first phase which broadly sets out to correct infrastructure and capacity deficits and optimize the existing capacity to innovate and create new employment and provide the best economic return on new infrastructure and private capital investment. There is also the objective of renewing and re-purposing Enterprise Property Capacity along the corridor.

The WDC agrees that Ireland needs its regions to develop to benefit the country as a whole, and investing in critical infrastructure which has been long underfunded or delayed, is a priority. Places with good infrastructure and connectivity are in a better position to develop than those that are relatively inaccessible and lack critical infrastructure. Poor accessibility, because of lack of investment in infrastructure and connectivity, is a causal factor in the lesser development of some regions.

Investment priorities

The current draft NPF *Ireland 2040-Our Plan* contains a reference to *incrementally* improving access to the North West but this is not a sufficient commitment. If the North West⁵ is to develop and be able to meet its growth targets there must be **accelerated** investment in infrastructure improving access and connectivity and providing the large towns with the capacity to grow.

The draft NPF also suggests that investment in connectivity first without urban consolidation measures will likely worsen the current trends towards sprawl and that only when the core areas in key cities and urban areas have been mobilised will there be enhanced accessibility between key urban centres become a priority. The logic for this sequential investment is not justified and also suggests a lack of understanding as to the role of infrastructure generally, and transport connectivity

⁵ Including Donegal, Sligo, Mayo, Leitrim and North Roscommon

in particular, in enabling development and the consequences of the underinvestment which has so negatively impacted the development of the North West.

While connectivity between cities is very important the focus on links between Cork and Limerick is another example of sequential investment while the North West, which has no designated city, needs improved accessibility as a priority. Given the planned alignment of the ten year Capital Investment Plan 2018-2027 (CIP) to the NPF, it would be important that the infrastructure requirements as outlined by the AEC are reflected in the RSES. However, the fact that the RSES will not be finalised and agreed until after the publication of the NPF and the CIP is a cause for concern. If the CIP is to be published alongside *Ireland 2040-Our Plan*, but the RSESs are not published for another year, the CIP could possibly exclude investments needed to implement the RSES. A mechanism is needed to ensure that there is a clear commitment to fund the infrastructure necessary to RSES implementation.

Rural Matters

Q. 8. How can rural towns and villages best be revitalised within the Region? Are there local, national or international best practice models that can be replicated and endorsed through the RSES that can revitalise the social, economic, cultural and heritage value and vitality of settlements?

Key Points:

Although smaller towns can face significant challenges they also have key assets such as cultural heritage, historic buildings, local businesses and high levels of social capital. These all provide opportunities for diversification and adaptation of the town and its social network to adapt and embrace future opportunities, whether it is improved tourism product, attracting people to live there, or developing knowledge and sectoral clusters such as creative industries.

Many towns have strong indigenous industries which may be exporting and a substantial number have some foreign direct investment, albeit on a small scale. There are other enterprises and employers too, and strong local services sectors and small scale manufacturing serving a local market which are very significant parts of the local economy and important local employers. All of these can be leveraged to support the development of local communities.

A key part of the solution to revitalising rural towns and villages and maintaining or increasing their rural populations is the availability of employment.

Towns have a mixture of employment types. Many towns have strong indigenous industries which may be exporting and a surprising number have some foreign direct investment, albeit on a small scale. There are other enterprises and employers too, and strong local services sectors and small scale manufacturing serving a local market which are very significant parts of the local economy and important local employers. They have significant levels of self-employment and entrepreneurship and have previously proven quick to respond to available opportunities. All of these can be leveraged to support the development of local communities. It is important that this is envisaged in the Strategy and in turn put into practice under the Action Plan for Rural Development.

Some rural areas also face infrastructure and service deficits such as poor public transport and often a low quality road network and difficulties in accessing healthcare and education services beyond the primary and secondary levels. Similarly, public transport is also key. Access to the rail and intercity bus network is essential. It is important to ensure that intercity routes continue to stop at towns regularly. Further development of rural bus services would be welcome, providing links between communities and allowing people access to their local towns but it is important that transport services are integrated with each other.

Modern ICT infrastructure is a prerequisite for economic and social development in rural areas. It can improve accessibility and link rural areas with each other and with urban markets, provide educational, healthcare and business opportunities as well as making rural areas more attractive as places to live, work and visit. High speed broadband should be available in *all* towns and be an asset of each town, alongside other key communications infrastructure including excellent mobile phone coverage at 4G and 5G levels.

Technology provides opportunities to work in a variety of locations and to market and sell our work and place. Towns should provide some shared work places available on flexible terms where local self-employed people, or people employed in other locations, can come to work. This can prove a centre of activity in a town and help contribute to its vitality and maintenance of its businesses and services.

Towns of all sizes should be centres for the provision of local services, including health and education services. Some of these services can be provided on a weekly basis to smaller towns. However it is important that access, via good transport links, is integrated with these. Although smaller towns, in particular, can face significant challenges they also have key assets such as cultural heritage, historic buildings, local businesses and high levels of social capital. These all provide opportunities for diversification and adaptation of the town and its social network to adapt and embrace future opportunities, whether it is improved tourism product, attracting people to live there, or developing knowledge and sectoral clusters such as creative industries. Exploiting the strengths of each town, while addressing its deficits, is the way to sustain viable communities.

The Action Plan for Rural Development has a number of important actions for the development and revitalisation of rural towns under its first Pillar on supporting sustainable rural communities. These include:

- **Action 1:** Support over 600 towns and villages through an enhanced Town and Village Renewal Scheme, with funding of up to €12 million per annum, to support their revitalisation, boost their potential to support increased economic activity and improve the living and working environment of rural dwellers.
- **Action 2** Develop and pilot an initiative to encourage increased residential occupancy in town and village centres.
- **Action 3** Complementing the Town & Village Renewal Scheme, roll out the National Town Centre Health Check Programme in selected rural towns across Ireland to maximise the contribution of important facilities and assets within rural towns, in particular heritage resources
- **Action 4** Finalising and implementing the recommendations of the Framework for Town Centre Revival to assist with the regeneration of rural towns.
- **Action 5** As part of Rebuilding Ireland, the Action Plan for Housing and Homelessness, support all local authorities to respond to the needs of their communities and deliver 47,000 new social homes which should also stimulate construction and other economic activities on a local and regional basis.
- **Action 6** Review planning legislation to allow the change of use of vacant commercial properties in cities, towns and villages, including vacant or under-utilised areas over ground floor premises, into residential units without having to go through the planning process.
- **Action 7** Increase delivery of small housing schemes in towns and villages as an alternative to one-off housing.

When these are implemented in a coordinated way, by town planning and integrated development of the town's assets there will be significant benefits for towns in the Region.

Other useful models are:

The Heritage Council's Policy Proposals for Ireland's Towns (2015)

http://www.heritagecouncil.ie/content/files/policy_proposals_irelands_towns_2015_5mb.pdf

Carnegie Trust “Searching for Space: What place for towns in Public Policy 2017 (covering both UK and Ireland) <https://www.carnegieuktrust.org.uk/carnegieuktrust/wp-content/uploads/sites/64/2017/11/Searching-for-Space-What-place-for-towns-in-public-policy.pdf>

Other interesting information on market towns, their role and development in relation to the Northern Powerhouse is available here:

- **Download:** [The Northern Powerhouse - where do market towns fit in?](#) (PDF, 1MB)
- **Press release:** [What can market towns offer the Northern Powerhouse debate?](#)

Q.9. How can one-off houses in the countryside be best managed so as to maintain it as a living and lived in landscape whilst protecting its environmental qualities and supporting the revitalisation of rural towns and villages?

Key Points:

It is important to recognise the need for a more flexible approach to planning in remoter rural areas where housing and residence is an important part of maintaining viable communities. However, the Strategy should set clear overarching policy for one off housing and provide the context for local decisions as the needs and situation of rural areas can differ widely but rural housing should not be a solution to urban spill over.

Where housing in the countryside is permitted the landscape effects should be considered carefully and the Strategy should give guidance on principles for housing in the countryside, and how it should be planned, perhaps with clusters or small groups, which would reduce the cost of infrastructure and servicing of the houses with utilities.

People live in the open countryside for a variety of reasons. They may be involved in farming, but could want to be close to caring for elderly or sick relatives. Various types of rural employment may mean that people feel the need to live in the countryside and at the same time those not tied to a specific workplace may choose to use this freedom to live in the countryside. Dual income households, where one partner is working in the countryside may need to live there, in particular if there is involvement in farm work, even where this is not an important income source. Very often people wish to live in the open countryside as they have access to land or a site on which to do so.

Many rural towns do not necessarily offer attractive, modern housing options. Towns often do not have a good social mix and can be unattractive places to live. It is therefore important that towns and rural villages are attractive places to live with good social mix, a variety of ages and useful local services. A variety of housing options need to be planned to cater for different needs.

Additionally there may be certain rural areas which will benefit from additional population and where a wider section of the population could be accommodated. Where housing in the countryside is permitted the landscape effects should be considered carefully and the Strategy should give guidance on principles for housing in the countryside, and how it should be planned, perhaps with clusters or small groups, which would reduce the cost of infrastructure and servicing of the houses with utilities.

It is important to recognise the need for a more flexible approach to planning in remoter rural areas where housing and residence is an important part of maintaining viable communities. However, the Strategy should set clear overarching policy and provide the context for local decisions as the needs and situation of rural areas can differ widely. The Local Authority is in the best position to understand the local situation and therefore should implement the high level principles but have flexibility to make the local policy.

Section 3: Our Vibrant Place

Disrupters

Q. 10. What do you believe to be the potential disrupters in our regional / national economy and what strategy will be necessary as a consequence?

Key points:

One of the characteristics of 'disrupters' is that they give rise to *unexpected* economic and social changes. They are, by their nature unpredictable. There must be emphasis here is on developing a ready and responsive region, rather than on predicting change.

It is likely that the development of the Internet of things (IoT), more renewable energy, electric vehicles, driverless cars, changing patterns of ownership (for cars and other assets) the development of 3D printing and its impact on local supply chains could all have important consequences for the region in 2040. How we respond to these changes and how well we are positioned in 2020 will all influence future outcomes for the region.

Ways of working are likely to have changed significantly by 2040 in response to a number of different factors. The gig economy and associated self-employment, the rise in global working and digital management of work flows will change the way we work. Similarly social change, for example and changes in the way household function, with more female participation in the workforce, and more equitable sharing of family and homecare responsibilities may also influence work patterns.

One of the characteristics of 'disrupters' is that they give rise to *unexpected* economic and social changes. They are, by their nature unpredictable. It therefore makes more sense to ensure that we plan to have a resilient, responsive region which can adapt and thrive in a changed future rather than to predict the disrupters.

Many of the elements required to ensure that this can happen are already known.

We need to invest in long term infrastructural assets which benefit large parts of the North West, allowing good connectivity in both transport and communications whatever form they take in 2040. Whether we use electric vehicles, driverless vehicles, timesharing rather than owning vehicles' it is likely that roads will remain important and essential for people to live in the region and participate in local, regional and global economies and society. Similarly while we cannot know how communications, internet and technology will change in the next 20 years, excellent communications infrastructure will be required and the quality available in a locality will influence how what place can develop. Looking back to the 1990s the investment decisions made in telecoms then have had important consequences for Ireland's development and the locations that have developed.

In addition ensuring we have quality, up to date infrastructure it is of course be important that we have quality, comfortable places for people to live, which can be heated efficiently and are safe and resilient in the face of potentially significant climate change and more extreme weather events.

How children born now are educated and develop skills for the future can also improve our resilience and ensure that 'disrupters' are positive opportunities. Education needs to be responsive to the needs of the future society but in particular by developing the skills which allows individuals to be adaptable and responsive to change, and which provides all with sound scientific learning and the skills for analysis of information and understanding of marketing, information and objective data.

Linked to this is the need to remain competitive, so manufacturing and service enterprises must continually upgrade skills and capabilities, access new ideas and technologies through industry networks, tap the knowledge of their workers, suppliers and customers and search for new market opportunities. There is also the necessity of ensuring people have skills for self-employment which may be an increasing trend in the next decades, and entrepreneurial skills to allow our region to grow indigenous business and benefit from our considerable assets. While external investment may continue to be important to the economy we need to have alternatives which allow the region to be resilient in the face of global change.

Ways of working are likely to have changed significantly by 2040 in response to a number of different factors. The gig economy and associated self-employment (which maybe by choice or the only available option for employment for many), the rise in global working and digital management of work flows will change the way we work. Similarly social change, for example and changes in the way household function, with more female participation in the workforce, and more equitable sharing of family and homecare responsibilities may also influence work patterns. The standard working week may be less important, various part time, flexible and piece work options many be more important. These will influence when, how and where people work and their leisure homework activities. Similarly population aging will mean both formal and familial caring as important economic and social activities will increase and will influence people's economic and social choices.

There is significant potential to make the most of the opportunities provided by trends in technology development, the growth of services employment, a move to more varied working hours, and greater remote and home working opportunities as well as incentives for enterprises to offer different work arrangements (timing of day, e-working) to reduce transport emissions⁶.

There must be emphasis here is on developing a ready and responsive region, rather than on predicting change. However, it is likely that the development of the Internet of things (IoT), more renewable energy, electric vehicles, driverless cars, changing patterns of ownership (for cars and other assets) the development of 3D printing and its impact on local supply chains could all have important consequences for the region in 2040. How we respond to these changes and how well we are positioned in 2020 will all influence future outcomes for the region.

⁶ WDC (2017), e-Working in the Western Region: A Review of the Evidence

Brexit

Q.11. What are the potential opportunities and threats presented to businesses in the region by Brexit and how can our RSES mitigate these threats?

Key points:

Brexit is a key strategic issue for the Northern and Western Region. Cross-border linkages including cross-border commuting, access to services, retail and trade are key strategic issues which will undergo massive changes in the context of Brexit. Planning for how to mitigate the impact of Brexit on border communities and the economy of the Border region in particular must be a core priority of the RSES.

Brexit will have long term disruptive impacts on the North West, but the scale and extent of these is difficult to predict which the shape and type of Brexit have yet to be agreed. If there continues to be free movement of people, and 'no hard border' the impacts will be less. If the border is hard, however, there will be both trading and infrastructural implications for the region. However, as it is likely that there will be more clarity on Brexit by the time the RSES is being finalised, it is probably not worthwhile to speculate on the options at this point.

This is a key strategic issue for the Northern and Western Region. Cross-border linkages including cross-border commuting, access to services, retail and trade are key strategic issues which will undergo massive changes in the context of Brexit. Planning for how to mitigate the impact of Brexit on border communities and the economy of the Border region in particular must be a core priority of the RSES.

Employment and Business impacts

The mainly indigenous manufacturing sector already often shows relatively low levels of profits as does the service sector of tourism. Both of these are likely to be significantly impacted by Brexit. As the Department of Finance has noted

Overall, excluding the Pharmachem sector, the exposed sectors are mostly Irish owned, regionally based, have relatively low profit levels and have a greater share of small and medium- sized enterprises. In addition they have a relatively high multiplier and account for a relatively high share of employment in regions which have experienced a slower labour market recovery since the financial crisis period⁷.

The exposed sectors (excluding Pharmachem) have a high share of indigenous ownership and are composed of SMEs. Food & Beverage, Traditional Manufacturing and Materials Manufacturing have relatively high output multipliers, indicative of their linkages to the domestic economy. A negative shock to output in these sectors would have significant second round effects. Thus any impact on the UK-exposed sectors of the Irish economy will have strong regional consequences. Indeed, the Border region has a higher share of total employment in four out of five of the most exposed sectors than any other region of the country.

Access to Health and Education services

Cross border health service provision is in place for a number of different specialities, if this were not to continue post Brexit the catchments for some health centres of excellence would be very large

⁷ Department of Finance | UK EU Exit – An Exposure Analysis of Sectors of the Irish Economy October 2016 vi-vii See also pages 19-20, 29, 30 for further discussion.

with patients in Donegal having to travel to Galway to access some critical and life-saving services. The location of additional health services in Sligo to service the North West region would be required to improve the quality of life for patients in the North West.

A similar situation applies to university education as there is no university in the Republic of Ireland north of the Galway-Dublin line. Students in the North West wishing to attend university often cross the border and again Brexit is likely to impact on the options to access Universities in Northern Ireland. To respond to this the development of the Technological University in the region needs to be expedited.

The Strategy needs to facilitate cross-border access to health and education services and to specifically to prioritise the upgrading the N17/N15 linking Galway, Sligo and Letterkenny to improve movement within the region.

Communities

It will also be important to identify key issues for communities and rural areas and develop a mitigation strategy for these and to provide guidance on issues for those in communities and rural areas affected and for local national and regional administration.

Even before we consider the impacts of Brexit we have a weak understanding of the reasons people are travelling across the Border, how often they travel and whether it is for work, trade or social reasons. Similarly, we don't have good information about local businesses trading, service provision, community engagement, local social and cultural activities across the Border.

We want a sustainable, viable, vibrant Border area in the future and achieving this needs to be a key objective of the Strategy.

Growth

Q. 12. How do we continue to sustain jobs in the region and what strategies should we pursue to grow job numbers?

Key Points:

Infrastructure, the '3Es' (Enterprise, Employment and Education) and Innovation are the key levers for effective regional development. When they work together they drive regional growth. Each has a distinctive role, and needs its own policy focus, but they are most effective when addressed through an integrated policy approach.⁸

The central aim of the RSES should be to provide the conditions for the Northern & Western Region to grow and realise its full potential. Infrastructure, the '3Es' (Enterprise, Employment and Education) and Innovation are the key drivers of regional development. When they work together they drive jobs growth. Each has a distinctive role, and needs its own policy focus, but they are most effective when addressed through an integrated policy approach such as the RSES.⁹

Infrastructure

Less developed regions such as the Northern & Western Region need to have a similar quality of infrastructures for their residents and businesses as is available in more successful regions. Infrastructural connectivity has a critical influence on choice of location for both indigenous and foreign investors. See other sections for the WDC's specific recommendations in relation to infrastructural investments.

But OECD¹⁰ work emphasises that transport and other infrastructure developments are not enough by themselves; to have an impact on jobs growth they need to be associated with, and complemented by, human capital and innovation developments.

The '3Es': Enterprise, Employment and Education

Regions are successful because enterprises in these regions are successful. When enterprises grow, employment grows and this depends on skilled and educated people. Policy to support the '3Es' of enterprise, employment and education must work together at both national and regional level to create dynamic regions.¹¹ Some of the key issues to be addressed by the RSES are:

- Changing work practices: The narrow definitions of 'job' and 'work' as a full-time permanent employee travelling every day to a specific work location is extremely limited and does not recognise either the current reality of 'work' or the dramatically changing patterns likely to emerge up to 2040. Self-employment, the 'gig' or 'sharing' economy, contract work, freelancing, e-Working, multiple income streams, online business are all trends that are dramatically redefining the conception of work, enterprise, and their physical location.¹² This trend is likely to continue and presents an opportunity for the Northern & Western Region.

⁸ WDC (2010), Why care about regions? A new approach to regional policy <http://www.wdc.ie/wp-content/uploads/reports-WDC-Policy-Briefing-Why-care-about-regions-July-2010.pdf>

⁹ WDC (2010), Why care about regions? A new approach to regional policy <http://www.wdc.ie/wp-content/uploads/reports-WDC-Policy-Briefing-Why-care-about-regions-July-2010.pdf>

¹⁰ OECD, 2009, How Regions Grow: Trends and Analysis; OECD, 2009, Regions Matter: Economic Recovery, Innovation and Sustainable Growth

¹¹ WDC (2011), Education, Enterprise & Employment: How can better integration of the 3Es drive growth in the Western Region? <http://www.wdc.ie/wp-content/uploads/WDCPolicyBriefing-Education-Enterprise-Employment-July2011.pdf>

¹² WDC (2017), e-Working in the Western Region: A Review of the Evidence

- Quality of life: Job opportunities are a critical, but quality of life is also a key determinant in the location decision of many people and current trends in the world of work and technology will increasingly help people to work from the same location where they want to live.
- Enterprise diversification: The RSES must enable and support the diversification of the Region's economy and provide a support framework for indigenous enterprise growth. High value, high skill exporting enterprises are central to export-led growth.
- Broad sectoral approach: However high-value enterprises cannot provide a full solution for jobs growth in the Region. Enterprises across all sectors have the potential to innovate and increase productivity but vary in how they contribute to growth and employment. Enterprises in employment-intensive, lower-skill sectors are central to maintaining and growing employment. The RSES must recognise and support existing and new sole traders, micro-businesses and freelancers working in sectors where the Region has comparative advantage or which are not location dependent.
- Opportunities for graduates: The recession led to high out-migration from the Region which was particularly detrimental as the propensity to migrate is higher among the more skilled, depriving the Region of their skills and leaving the less skilled more dependent on local employment opportunities. The creation of job or entrepreneurial opportunities for graduates will help retain and attract a highly skilled labour force and, in turn, stimulate further growth and employment.
- Supporting self-employment: A key characteristic of the Region is higher self-employment. While farming influences this to some extent, self-employment is higher in the region across most sectors. In more rural areas and smaller towns, people who wish to continue to live in these areas have created their own job. The RSES must both recognise and support this trend. The Local Enterprise Offices, local development companies and local authorities are most active in supporting this type of business. It would be important to continue and expand initiatives to support them such as:
 - Roll-out of fibre broadband.
 - Provision of serviced, shared workspace including through Community Enterprise Centres, at a reasonable cost.
 - Mentoring and provision of grants for start-up and established businesses.
 - Network facilitation to allow self-employed, particularly in more rural areas who may be quite isolated, to connect with others in other own or other sectors.
 - Training and upskilling for owner/managers and self-employed across all sectors including personal services (hairdressing, childminding), building trades, retail and hospitality.
- Further and higher education: Educational institutions build the Region's human capital assets, attract and retain talent. **Further education and training have a particular role in up-skilling those with lower education levels, who face higher unemployment rates and are at greater risk of long term unemployment.** Higher education brings knowledge creation, knowledge transfer, cultural and community development and innovation to regions. It can also stimulate entrepreneurship. Within the Region, NUI Galway is a key regional asset and economic driver. It greatly contributes to the attractiveness and economic development of Galway city and its wider hinterland. To the North West the three Institutes of Technology of Letterkenny, Sligo and Galway-Mayo, are collaborating on the Connacht/Ulster Alliance, with the goal of developing a technological university for the region, an initiative that has the potential to expand the contribution of higher education to regional development in this area.

Innovation

Innovation policy is often focused on scientific and technological research, but while leading OECD regions produce several hundred patents per year per million inhabitants, more than one third of OECD regions generate fewer than ten patents per year. **Lagging regions such as the Northern &**

Western need a different kind of innovation policy, one that emphasises absorption capacity and innovation by adoption.

A substantial focus of the RSES should be on adoption of innovations developed elsewhere and on initiatives in areas such as human resource management or implementation of new processes. It should stimulate innovation activity in areas where the Region has particular strengths such as renewable energy and agri-food.

Q.13. What in your view are the regional emerging sectors? What would you identify as a strengths, and opportunity for this region?

Key Points:

Sectors which could provide significant opportunities for the region:

- Creative industries
- Tourism
- Agri-food
- Renewable Energy
- Medical technology
- ICT
- Marine
- Social Economy and Social Enterprise

For the Northern & Western Region, developing enterprises in sectors which build on its assets and characteristics will drive broad-based job creation across the region and contribute to it becoming more successful. These include:

- **Creative industries:** The creative industries of arts, crafts, design and media is another area of regional strength with **many creative entrepreneurs attracted to the Region by its high quality of life**. It has been estimated that close to 11,000 people in the region are engaged in this sector, characterised by sole traders, micro-enterprises and freelancers. The WDC is the lead partner of a transnational project called ‘a creative momentum project’ supporting the development of the sector, including expanding export markets.¹³
- **Tourism:** Cultural heritage, outdoor recreation, experiential tourism and the ‘silver market’ are some of the tourist areas of potential growth. **The Wild Atlantic Way initiative is an example of a regional approach driven by the public sector and strongly supported and developed by the private sector in these areas.** Developing the tourism assets that exist beyond the Wild Atlantic Way and in areas which are not traditional tourism ‘honeypots’ is an area of substantial growth potential. In 2016 23,038 people in the Western Region worked in the Accommodation & Food service sector which, while it does not fully cover ‘tourism’ is an indication of its key employment role. Between 2011 and 2016 employment in this sector in the region grew by 12.8%.
- **Agri-food:** Agri-food is one of the most regionally dispersed sectors nationally and plays a central role in the rural economy. **In 2016 there were just over 5,000 people working in food and beverage manufacturing in the Western Region. Given the nature of agriculture in the region, opportunities in value-added meat processing, organic production, functional foods and artisan products are potential areas of growth**, in some cases linked to the tourism sector. In general however the region’s agricultural and agri-food sector is of a smaller scale than that elsewhere such as the South West and also plays an important environmental stewardship role.

¹³ www.mycreativeedge.eu

It has been predicted that the agri-food sector will be one of the most severely impacted by Brexit and strategies to help the region's sector adapt and explore new export markets will be important for regional development.

- **Renewable energy:** Renewable energy is an area where the Region holds substantial resources in wind, ocean and biomass, which can be developed for regional and national benefit. The WDC is actively involved in a number of projects to develop the region's renewable energy capacity. – Currently the WDC is a partner in three transnational projects in this area¹⁴ – GREBE (Generating Renewable Energy Business Enterprises (lead partner)), Re-Direct and LeCO. These projects are concerned with developing renewable energy businesses in the region, promoting the efficient use of natural resources / materials by converting residual biomass into carbon products, and community energy respectively.
- **Medical technology:** In 2016 there were 12,658 people employed in the medical technology sector in the Western Region, an increase of 30.2% since 2011. In 2016 46% of all employment in that sector nationally was within the seven-county Western Region, illustrating the strength of the region's cluster. The cluster consists of a number of large multinationals, many in Galway and Mayo but also in other western counties, and a considerable number of smaller IP-based indigenous companies. The WDC has invested in many through the WDC Investment Fund. Strengthening this cluster: the region's research and development capacity; the ability of multinationals based in the region to compete internally for new products; and indigenous start-ups will be important to maintaining its prominent international role.
- **ICT:** There is potential for ICT to support the development of other sectors in the region with innovative communications and technological solutions, but ICT can drive econ development in its own right, and the region can be a place for collaborative development of products and services with an ICT base, perhaps with a special focus on the needs of remoter or more dispersed populations where technological and communications solutions can help provide better linkages on product supply chains and better services. There may also be future opportunities to develop the region as a base for data centres. As cooling is a large cost in running such centres, the Western Region's cooler, wetter climate is an important asset in attracting such investments.
- **Marine:** The Western Region's many valuable marine assets are relatively under-developed. **The region is in a position to take advantage, in a sustainable way, of potential in seafood products, tourism, amenity and ocean energy. Other innovations in the use of marine assets are also likely in life sciences.** Our extensive ocean resource and the existence of research infrastructure and a research orientated FDI and SME base, offers potential for developing the blue economy while preserving the ecological stability of the marine environment.
- **Social Economy and Social Enterprise** The social economy and development of social enterprises also offer significant opportunities for the region as drivers of development, creating jobs and providing services and addressing local needs. There is potential to build on current experience in the area, by supporting social enterprises and enabling partnerships with the public sector and with private enterprise. This is discussed further in Q2.

A regional approach, bringing together the private and public sector is critical to developing the potential of these sectors. New and existing SMEs and micro-enterprises in these, and other sectors, need to be facilitated to enter international markets.

¹⁴ <http://www.wdc.ie/regional-development/renewable-energy/>

Q. 14. How will new technologies and digital / mobile technology impact on our settlement patterns?

Key Points:

Broadband access and increasingly available next generation access has enabled more varied work practices as well as more varied work locations to emerge. Self-employment, the 'gig' or 'sharing' economy, contract work, freelancing, e-Working, multiple income streams, online business are all trends enabled by new technologies and are dramatically redefining the concept of work, enterprise, and their physical location with more work taking place at home. This trend is likely to continue and presents an opportunity for the Northern & Western Region.

Broadband access and increasingly available next generation access has enabled more varied work practices as well as more varied work locations to emerge. A survey by Eir¹⁵ found that 21% work occasionally from home though they are not based at home. The research also found that 59% of the working population now do some form of their work at home (e.g. check emails, bring work home etc.).

Focussing on rural dwellers, a study conducted for Vodafone in 2016 found that nearly one in four broadband users in rural Ireland use the internet at home in relation to their work and one third have remote access to their company network. An estimated 150,000 rural workers avoid commuting some or all of the time because they can connect to work remotely.¹⁶

In 2016 an IBEC survey¹⁷ of their membership found that 30% (110) of companies had a practice of e-Working/ home-working, on one or two days per week, while 5% have a practice of e-Working five days per week. Companies operating e-working policies do so to retain key personnel as well as being able to access a larger labour market. For example, Pramerica (www.pramerica.ie) based in Letterkenny, employs approximately 1,300. The company operates a policy of teleworking and some staff live and work as far away as Limerick and Kerry.¹⁸

The current reality of 'work' is much more varied than the traditional narrow definition of 'work' as a full-time permanent employee travelling every day to a specific work location. Self-employment, the 'gig' or 'sharing' economy, contract work, freelancing, e-Working, multiple income streams and online business are all trends enabled by new technologies and are dramatically redefining the concept of work, enterprise, and their physical location. This trend is likely to continue and presents an opportunity for the Northern & Western Region.

While the location of job opportunities is crucial to regional development, their location is not the only factor in people's decisions on where to live, and many other personal and social factors influence this decision. Quality of life is a key determinant in the location decision of many people and current trends in the world of work and technology will increasingly help people to work from the same location where they want to live.

¹⁵ Eir Connected Living Survey 2015 https://www.eir.ie/opencms/export/sites/default/.content/pdf/pressreleases/eir-connected_living_survey.pdf 48% of workers specifically check work email at home, up from 42% in August 2014.

¹⁶ WDC (2017), e-Working in the Western Region: A Review of the Evidence

¹⁷ IBEC, Flexible Working Arrangements Report, 2016.

¹⁸ <https://www.pramerica.ie/life-pramerica/>

Q. 15. How do our rural and peripheral communities (<10,000) remain sustainable and create job and population growth?

Key Points:

Rural areas are often attractive places to live, and have lower housing, childcare and other costs than many urban areas. Therefore, by working to improve employment opportunities and develop and support a culture of enterprise and entrepreneurship will help to improve the viability of rural communities.

It is essential that the Strategy dovetails with the Action Plan for Rural Areas to ensure they work together to provide a strong policy and strategic basis for regional and rural action and so are doubly effective in their focus on improving economic opportunities and social well-being and thus quality of life for people living in rural communities. It is also essential to ensure that national goals align with regional strategies and county and local plans, across all sectors not just in the areas of planning and land use.

Rural areas are already supporting national economic growth, climate action objectives and the development of local communities but a greater focus on rural development and in developing rural regions would increase the contributions made by rural areas. To sustain viable rural communities we need to stimulate growth and employment, address issues of out migration and demographic change, provide innovative and practical public service solutions and make better use of their rich natural resources while ensuring they are protected for the future. We need to be aware of the cost of doing nothing, of not investing in making rural areas more sustainable. These are not just the economic costs of higher unemployment and under employment and the associated social welfare, they include the human costs of social exclusion, poverty and isolation.¹⁹

It must also be remembered that rural areas are often attractive places to live, and have lower housing, childcare and other costs than many urban areas. Therefore, by working to improve employment opportunities and develop and support a culture of enterprise and entrepreneurship this will help to improve the viability of rural communities.

Rural areas depend on their natural resources for much of their economic activities, indeed this is one of the key differentiating characteristics of a rural economy. Making the most of these assets, for enhancing quality of life, attracting people to live, work and visit and providing employment opportunities in a coordinated way can all help to sustain rural communities alongside the natural environment. There are significant opportunities in the development of the green economy and bio economy, in areas such as renewable energy, new forms of food production and agricultural output all of which can take advantage of more concentrated urban markets, particularly when the 'story' of local sustainable production is integral to their sale and value.

The high quality environment of the Western Region of Ireland is a key asset, providing opportunities in the area of high value food production, foraging opportunities, and enjoyment of the landscape and nature. Indeed, in the future recreation, amenity and outdoor activities will centre more on key experiences and the development and sale of such experiences can provide quality employment in rural areas. As the quality of the environment and low population density are key to these it is important that there is management and regulation of these assets to ensure they can continue to contribute to rural economies but also to ensure that these assets are available to future generations and users. Good quality of life is also an asset of our rural areas so it is important

¹⁹ Social Justice Ireland, 2016, Socioeconomic review: chapter 12 rural development

that they are in a position to attract people of working age. This is in part by being appealing places to live with attractive small towns and also through good connectivity allowing multiple forms of working.

A problem for rural areas is often a lack of local market because the population is smaller and often less well off. However, there is significant potential in the global market, in particular for services and 'experiences' or quality products with strong local connections and 'stories'. Such products, with a focus on their local qualities can, with innovative development and marketing, take advantage of global opportunities and allow more growth in rural regions.

Rural communities can face particular challenges due to the demographic composition of their communities, the structure of their economies and their access to and ability to adopt new technologies. However, it is important to recognise that all rural areas and rural communities are not the same. There are differences in remoteness and accessibility, in the influence of large urban centres and their connections to it and in the natural resource assets and in their access to infrastructures.

As mentioned throughout this submission employment is crucial to population maintenance and growth. Rural areas have a mixture of employment types. Most counties have some foreign direct investment, albeit on varying scales, and some have strong indigenous industries which may be exporting. There are other enterprises and employers too, and strong local services sectors and small scale manufacturing serving a local market which are very significant part of the local economy and important local employers. They have significant levels of self-employment and entrepreneurship and have previously proven quick to respond to available opportunities. This is evidenced by the rapid population growth in most rural areas during the 'celtic tiger' and while that growth proved unsustainable it provides clear evidence that people were ready to respond to the opportunities available which allowed them to live or work in rural areas. Relatively limited job options, especially in rural areas, means that more people have to create their own job. The development of entrepreneurship and support for self-employment and other forms of employment in rural areas will help maintain rural populations.

It is essential that the Strategy dovetails with the Action Plan for Rural Areas to ensure they work in a coherent manner to provide a strong policy and strategic basis for regional and rural action and so are doubly effective in their focus on improving economic opportunities and social well-being and thus quality of life for people living in rural communities. It is also essential to ensure that national goals align with regional strategies and county and local plans, across all sectors not just in the areas of planning and land use.

Q. 16. Are there additional or specific value propositions which have been omitted above, and which are likely to emerge in the coming years, even if specific to a particular Sub-Region?

Key Points:

The central aim of the Strategy should be to provide the conditions for the Region, its city, towns and rural areas to grow and realise their full potential, based on their assets.

The Northern & Western Region's high quality of life and attractive natural environment make it an attractive location for people to live, work and visit. The high number of environmental designations should be viewed as key assets on which we can build. The natural habitat of the region also lends itself to the development of a regional recreation and activity brand, with businesses providing these options for tourists.

The region has strong historical and cultural identity which can form a part of a confident regional

identity as well as providing the opportunity to develop regional expertise in local history and local culture, both past and present.

Our marine assets are tremendous; tied in with development of ports and harbours and land based transport this is an area with potential for a significant contribution to the region's economy.

Social enterprise and a strong social economy are areas of great potential in the region, creating jobs, providing services and addressing local needs.

The central aim of the Strategy should be to provide the conditions for the Region, its city, towns and rural areas to grow and realise their full potential, based on their assets. In this section we list a number of additional 'value propositions'.

The Northern & Western Region's high quality of life and attractive natural environment make it an attractive location for people to live, work and visit. Areas of potential include niche eco-tourism, developing an identity for the region associated with high environmental quality and developing tourism options for those with an interest in the area. .

The natural habitat of the region also lends itself to the development of a regional recreation and activity brand, with businesses providing these options for tourists and people from other parts of the island, as well as attractive opportunities for people who live here. This can contribute significantly to the attractiveness of the region.

In addition to our natural habitat, the region has strong historical and cultural identity which can form a part of a confident regional identity as well as providing the opportunity to develop regional expertise in local history and local culture, both past and present. There are niche opportunities for businesses and tourism development in these areas. These could be in areas such as literature, and local crafts and creativity.

The region has strong natural assets which can be used for renewable energy production, from wind, biomass and the marine and to a lesser extent from solar. Producing renewable electricity and the renewable biogas can make the region an attractive site for 'green' investment. Renewable energy is an area where the Western Region holds substantial resources in wind, ocean and biomass, which can be developed for regional and national benefit. 28% of Ireland's installed Wind Energy capacity is currently based in the Western Region. The WDC is actively involved in a number of projects to develop the region's renewable energy capacity. Currently the WDC is a partner in three transnational projects in this area²⁰ – Generating Renewable Energy Business Enterprises (lead partner), Re-Direct and LeCO. These projects concern developing renewable energy businesses in the region, promoting the efficient use of natural resources / materials by converting residual biomass into carbon products, and community energy respectively.

Our marine assets are tremendous; tied in with development of ports and harbours and land based transport this is an area with potential for a significant contribution to the region's economy.

Social enterprise and a strong social economy are areas of great potential in the region, creating jobs, providing services and addressing local needs. See Q2 for further discussion.

²⁰ <http://www.wdc.ie/regional-development/renewable-energy/>

Section 4: Our Natural Place

Transition towards a Low Carbon Economy

Q. 17. How do we integrate sustainable policy and practice into our RSES so that they add value and not just regulate our practices?

Key Points:

The high number of environmental designations should be viewed as key assets on which we can build. Areas of potential include niche eco-tourism, developing an identity for the region associated with high environmental quality and developing tourism options for those with an interest in the area. It is also an important area for the development of research and environmental management expertise and specialisms.

The natural environment is a key asset of the Western Region and therefore it needs to be protected, and enhanced, both for its existence value to the economy and society and also for the potential it brings to local economic development. It is therefore important that the environment is protected and managed appropriately in a sustainable manner.

The high number of environmental designations should be viewed as key assets on which we can build. Areas of potential include niche eco-tourism, developing an identity for the region associated with high environmental quality and developing tourism options for those with an interest in the area. It is also an important area for the development of research and environmental management expertise and specialisms.

The natural habitat of the region also lends itself to the development of a regional recreation and activity brand, with businesses providing these options for tourists and people from other parts of the island, as well as attractive opportunities for people who live here. This can contribute significantly to the attractiveness of the region.

The region has strong natural assets which can be used for renewable energy production, from wind, biomass and the marine and to a lesser extent from solar. Producing renewable electricity and the renewable biogas can make the region an attractive site for 'green' investment.

Q. 18. Would the development of a co-ordinated approach to supply chain development in the forestry/ biomass sectors have the potential to deliver regionally significant dividend to the region through innovative renewable energy solutions for businesses and communities, together with the adoption of energy efficient technology? What would this look like and what barriers exist and how can they be resolved?

Key Points: The region is uniquely placed to develop a wood energy sector because it has the forestry resource required to supply market demands, now and in the future. Developing the sector has a potentially important impact arising from its possible longer term role in developing viable economic activity in rural areas. Wood heating makes use of existing natural resources, most of the employment is rural, and the high costs of transport mean that the activities must be locally based, bringing benefits throughout the region.

The region is uniquely placed to develop a wood energy sector because it has the forestry resource required to supply market demands, now and in the future. Ireland now imports 88%²¹ of its energy and is heavily reliant upon imported fossil fuels. Developing the sector has a potentially important

²¹ <http://www.seai.ie/resources/publications/Energy-in-Ireland-1990-2015.pdf>

impact arising from its role in developing viable economic activity in rural areas. Wood heating has a number of advantages in this regard. It makes use of existing natural resources, most of the employment is rural, and the high costs of transport mean that the activities must be locally based, bringing benefits throughout the region. The increased viability of small farming business and associated community cohesion are also important in this regard. Wood energy is the most significant source of renewable energy in the EU, where it is a technically mature, widely deployed and commercially viable sector. Examination of the market prospects shows the underlying economic attractiveness of certain types of wood energy investment in the region. Wood heat is viable and commercially attractive and its development can help improve regional competitiveness. In the Western Region 11.5% of land is afforested (approx. 40% of Ireland's forestry), of this approximately 113,400 hectares are in private ownership and approximately 3,000 hectares of private forestry are being planted per annum. WDC work has established that there will be a sustainable harvest of pulpwood and a related supply of co-product in the future²².

Wood heating systems are more expensive to install than oil or gas heating systems. However, they are much cheaper to operate as the cost of wood fuel is lower than oil and gas. In simple terms, wood heating will gain market share where the fuel savings justify the capital investment. The range of typical applications includes installations such as large hotels, care homes, hospitals, leisure centres, secondary schools, shopping centres, commercial glasshouses, cement and chemical works, and large offices. The role of the public sector in early market development is a key one and an essential priority for action.

Many energy users are simply unaware of the technology and the wood fuel supply options. In addition there can be a lack of market confidence in the technology and fuel supply chain because it is new to the region. For the market to develop there needs to be greater confidence in the reliability and convenience of the technology.

In order to grow the market, technical, design and practical skills in the installation, operation and conversion of wood to energy must be developed. The business case and fuel supply models must be understood. The investment process is more complex than for a standard oil fuel boiler and specialist expertise is required. This investment is therefore more time consuming and risky than an investment in fossil fuel heating.

There is a lack of awareness of the heat market opportunities, and limited knowledge and technical expertise of the wood fuel supply chain amongst growers. Many of the plantations that are most suitable for wood energy production are dispersed and small in scale and therefore must be 'clustered' to make market entry commercially viable. New investment in equipment and infrastructure will be required in order to respond to market opportunities.

Supportive planning policies will help to increase the rate of market development. For instance there is a lack of awareness among potential users as to the planning requirement for a wood heat facility. Similarly, better understanding of the benefits of wood heat systems and their operations is needed to improve their passage through the planning process.

²² http://www.wdc.ie/wp-content/uploads/reports_WoodEnergyStrategy_Full.pdf

Q. 19. How can the RSES assist local authorities and other stakeholders in addressing its climate change responsibilities and targets?

Key Points:

The Strategy will provide the context for regional development to 2040 and much of the move to a low carbon economy will take place in that time period. It is important that the Strategy plans for this so that structures are in place for the development of the low carbon practices which will be required. This will mean a clear vision for transport, for industrial development, for energy production and consumption and for agriculture in the region will be necessary. If the Strategy provides clear direction on this and local authorities will act in line with the strategy then it will be easier to address these responsibilities for mitigation of climate change and adaptation to its consequences over the longer term.

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With the publication of the National Mitigation Plan (NMP) and the National Adaptation framework (NAF), and with the recognition that it is necessary for Ireland to move towards a low carbon or fossil fuel free economy, it is essential that the Strategy supports and enables this switch. While we must reduce emissions nationally the Strategy must consider the needs of the region.

In relation to climate adaptation, development planning is of course very important, ensuring that we have planned for potential negative consequences of climate change. Flooding has been an important issue for many parts of the Western Region so it is important that this is considered in planning policy and that limitations are placed on development of areas known to flood, as well as adaptation and protection of those parts which are already developed.

Many of the actions associated with climate adaptation as outlined in the National Adaptation Framework (NAF) will be the responsibility of local authorities. To help them the Government is setting up Local Authority Regional Climate Action Offices around the country to implement national climate policy. Four are to be set up, one of which is to be located in Castlebar. This Atlantic Seaboard North office will cover counties Mayo, Donegal, Sligo and Galway and will be located in the Mayo County Council building in Castlebar. Prepared under the Climate Action and Low Carbon Development Act 2015, the National Adaptation Framework (NAF) sets out the potential implications of climate change for Ireland and specifies the national strategy for the development of adaptation measures by key sectors and by local authorities. Local authorities will play a key role in 'identifying our vulnerabilities and increasing our overall climate resilience'.

People in the region are more reliant on car based transport, they have less available public transport and tend to travel greater distances. Clearly rural dwellers' transport demand patterns need to be central to planning for climate change mitigation. In addressing this issue it is important to consider the underlying presumption that employment will be concentrated in cities. There are opportunities for employment to be more dispersed, in line with current population patterns. Towns, smaller centres and rural areas provide a variety of opportunities as locations for employment across many sectors (not just agri-food and tourism). Commuting travel demand, fuel use and time spent can also be reduced if employment is more dispersed, in line with current population patterns. In 2011 61% of rural dwellers (excluding farmers) worked in towns or rural

areas rather than cities, illustrating the potential to stimulate employment closer to where people live.

It can be argued that better spatial planning, with more concentration in population centres, will provide more concentrated transport demand which can be better served by public transport with lower per capita emissions. However, in addition to planning for future development, there is a need to manage current and historic settlement patterns. People will continue to follow historic patterns and it should not be assumed that land use planning can radically alter Ireland's historically dispersed settlement pattern, especially in the Western Region and other rural regions. Finally, should there be a significant switch to electric vehicles, and if electricity generation is mainly renewable by 2040, then rural emissions will fall considerably.

Marine

Q. 20. Ireland's marine economy (Our Ocean Wealth) has an ambition to grow from 0.9% of GDP to 2.4% by 2030. How can our region, our communities reap dividend from the unprecedented growth of our blue economy?

Key Points:

Developing our maritime potential needs to be supported by and integrated with land based investment to ensure that the benefits of developments in our island and marine economy are felt among the communities living adjacent to marine opportunities.

Nearly half (49%) of the coastline of the Republic of Ireland is in the Northern & Western Region²³, so the development of our island and maritime potential is regionally and nationally important. The Region's many valuable marine assets are relatively under-developed. The region is in a position to take advantage of potential in seafood products, tourism, amenity, ocean energy and marine innovations for the life sciences sector. Our ocean resource and the research infrastructure and research orientated FDI and SME base, offers potential for developing the blue economy in a sustainable manner.

In order to develop the maritime economy, land based infrastructure development is essential. Some of the areas with greatest potential for maritime activity are among the most remote parts of Ireland and have, historically, poor infrastructure.

Our ports and harbours are a hugely important infrastructural asset with many functions;

- as transport hubs for distribution of into the Region, e.g. Shannon Foynes, Galway Port and Killybegs particularly
- as fishing ports and processing centres, e.g. Killybegs, Greencastle and Rossaveal
- and as marine tourism centres ranging from large scale ocean cruises to smaller marinas and harbours for berthing smaller fleet.

Improvement in broadband and mobile phone connections is essential to the development of our offshore economy and coastal communities, in the same way as they are for other rural and less developed areas. It would support the development of local enterprises and community connectivity both in high-tech, high value added opportunities in the marine sector as well as in tourism, amenity and recreation and more traditional fishing, marine farming and foraging enterprises.

Another priority in most instances is improved road connection, our coasts are not well served by a quality road network. In some areas, as ocean energy opportunities are developed, significant energy transmission and distribution infrastructure investment will also be required. These areas should be designated in the NPF and RSEs.

If we are committed to developing our maritime potential it is important that this is supported and integrated with land based investment to ensure the benefits of developments in our island and marine economy are felt in areas adjacent to marine opportunities.

²³ Note this is a higher ROI coastline (5,507km) than the standard 3,171km from the OSI, but measures of coastline are very variable.

Q. 21. How can the region extract the maximum sustainable benefit from the potential of key maritime assets such as Killybegs Fishing Port, Galway Port, north Mayo coastline, the BIM Maritime Educational Facility (Greencastle) and other key Infrastructural assets?

Q. 22. How do we as a region strengthen our maritime identity and increase our awareness of both the commercial and non-commercial benefits of engaging with the sea in support of harnessing all its extensive coastal hinterland. How and where can we best capture these benefits and what barriers need to be negotiated?

Key Points:

The goal to realise our island and maritime potential, makes recognition of the importance of our Atlantic ports essential and policy needs to change to support a greater role for ports such as Galway Port and Killybegs among others.

Investment in dedicated marine infrastructure, coastal economies, incubation and enterprise support centres is required we need to integrate the key actors; innovators, policy makers, investors from the marine, maritime and energy sectors with those from other marine industries and the broader community of entrepreneurs and with our coastal and inland populations. This focus will drive accelerated economic, societal, innovation and infrastructural marine growth.

Located on the extensive western coast, both Galway and Killybegs ports play an important role in supporting the marine and fishing sectors as well as providing key transport access points and contributing to the tourism offering, with further potential to grow. Ports are also important service centres for naval facilities as well as Search and Rescue services.

Galway Port is planning a major expansion which will include a new deep water port which will support tourism through new berthing facilities for cruise ships as well as a marina.²⁴ Better freight facilities are also planned.

Killybegs port is a natural deep-water port and the second largest fishing port in the country. It also handles passenger cruise liners and mixed specialist cargoes. In recent years Killybegs has become the favoured port for the importation of wind turbines, and is a service port for the offshore gas/oil drilling rigs, a sector which is likely to become increasingly significant with the development of the renewable energy sector.

Test sites for renewable ocean energy such as the Galway Bay Test Site and the Atlantic Marine Energy Test Site in Co Mayo provide significant potential for the region to lead development in this area. Continued support for facilities such as the Marine Institute (Co. Galway) is very important, the former in recognition of the critical role the Institute plays in ensuring the sustainable development of Ireland's marine resource and the two Fishery Harbour Centres at Ros an Mhil, Co. Galway and Killybegs, Co. Donegal. The recognition of the role they play in supporting the sustainable development of the economic and social fabrics of the regions in which they are located.

Facilities such as the Galway Bay Underwater Observatory and the BIM National Fisheries College of Ireland site at Greencastle are also important resources which will need to be supported and expanded upon if the Region is to contribute substantively to the higher GDP targets to be realised from the Marine sector by 2040.

Policy

Current policy; the National Ports Policy (2013) designates Irish Ports in order of national and regional significance. There are no Tier 1 or Tier 2 ports located along the entire coastline of the

²⁴ <http://www.galwayharbourextension.com/>

west/North West²⁵. Galway Port is designated a port of regional significance. Formulated before consideration of the National Planning Framework, the context therefore was one of ‘business as usual’ rather planning for ‘an increasing population in a balanced and coherent way’ (p.5) with specific regional targets. However the Draft NPF appears to propose the continuation of the business as usual approach: proposing that there be *A greater concentration of traffic through Tier 1 ports; Dublin, Cork and Shannon Foynes* (p.94).

While there is strong growth in traffic through all Irish ports there is an increasing imbalance with volumes through Dublin port being disproportionately large while local ports do not put through the volume that good spatial strategy would dictate, according to the Irish Exporters Association²⁶. In the interests of competition, security and more regional balance there should be less concentration rather than more at Dublin Port and policy needs to reflect this.

The goal to realise our island and maritime potential, makes recognition of the importance of our Atlantic ports essential and policy needs to change to support a greater role for ports such as Galway Port and Killybegs among others. Policy needs to change to reflect and support more competition between the larger ports and to avoid the monopoly of activity occurring at Dublin Port. The role of regional ports such as Galway Port needs to be reconsidered in a new context rather than supporting the discredited ‘business as usual’.

Given that much of the island and marine economy and culture is outside the cities and larger towns, the marine economy could, if very successful, lead to significant development in places which are outside the perceived drivers of growth; cities and towns.

One growth potential areas is the promotion of inland waterways as sites for inland marine tourism. The continues growth in tourism offer an opportunity to more effectively market our rivers as tourism destinations, for fishing, angling and cruising as examples.

²⁵ Only Tier 1 and Tier 2 ports are named and the Tier 1 ports are well located to serve the Eastern and Southern regions (Dublin, Cork, Shannon Foynes), while Shannon Foynes is the only port mentioned on the west coast.

²⁶ Pre Budget Submission, Budget 2018, Irish Exporters Association p.9, 10. <http://www.irishexporters.ie/wp-content/uploads/2017/08/PreBudgetSubmission2018.pdf>

An Gaeltacht

Q. 23. How can the RSES best support Gaeltacht communities to retain a strong social & cultural and linguistic identity?

Q. 24. Can the RSES play a role in broadening employment base and enhance productivity within our Gaeltacht communities?

Q. 25. What and where are the regionally significant opportunities within the Gaeltacht and how can the RSES enable them to be realised?

Key Points:

The areas deemed to be 'Gaeltacht' and their governance under regional and local governance structures needs to be considered, both in terms of the integrity of the Gaeltacht areas covered, their boundaries and also their relationship with English speaking areas. Planning for economic development must address issues of language development as essential to Gaeltacht regions and also address the balance between maintaining social and cultural identity of Gaeltacht regions while avoiding discrimination against those who do not originate in the Gaeltacht.

The Strategy must contribute to the national goal of supporting the Irish language, and strengthening its use as the principal community language of the Gaeltacht and to assist the sustainable development of Gaeltacht communities.

It is important that the NWRA work closely with the agencies involved in the maintenance and development of the Irish language in the Gaeltacht areas including in particular Údarás na Gaeltachta as the regional development agency for the Gaeltacht. Where appropriate it should link with Foras na Gaeilge in its work in supporting the Irish language on an all-island basis.

Údarás na Gaeltachta has important regional development responsibilities for Gaeltacht areas and has experience of the issues essential to economic, social and cultural development as well as the development of language and identity in these areas. Therefore responsibilities may overlap with those of the NWRA in relation to the RSES so it is important that there is close contact between the agencies while developing the Strategy

However, planning in a broader sense will be important in the Gaeltacht areas and so it is essential that the RSES address both physical planning and economic and social development of these areas in future. It is also important to ensure that there is a clear mechanism for integrating the plans to be prepared under the Gaeltacht Act into the wider regional strategies even though the timelines may be different.

In addition, the areas deemed to be 'Gaeltacht' and their governance under regional and local governance structures needs to be considered, both in terms of the integrity of the Gaeltacht areas covered, their boundaries and also their relationship with English speaking areas.

Planning for economic development must address issues of language development as essential to Gaeltacht regions and also address the balance between maintaining social and cultural identity of Gaeltacht regions while avoiding discrimination against those who do not originate in the Gaeltacht.

The traditional language and culture of Gaeltacht areas can help to drive local development and should be used to enable employment and economic opportunities based on these characteristics. There are opportunities for development in niche areas, which are often of high value, where provenance, history and stories associated with the product have increased importance.

Examining these opportunities and enabling people to take advantage of them is an important element of development in Gaeltacht regions, but provision of appropriate services and availability

of services in Irish is also essential to maintenance of Gaeltacht areas and the Irish language as a language of daily living. Recognising this and recognising the importance of Gaeltacht areas as a part of the regions identity is essential to ensuring these areas thrive, and also to ensuring that the RSES can be successful.

Many of the issues facing Gaeltacht areas such as peripheralisation, poor infrastructure and poor networks are also faced by other remote rural communities. The RSES should provide a context for the development of all of these areas, but with a specific emphasis on language and identity in the Gaeltacht. It should ensure that the both local plans and the strategies for infrastructural and for economic and social development are mutually reinforcing.

Tourism and Greenways

Key Points:

Drivers of the rural economy such as tourism, green products and services and the creative industries need jobs and innovation policies which are cognisant of the particular characteristics of these sectors in rural areas and address the barriers to their growth. At the same time, the sensitive development of our biodiversity, conservation, cultural heritage and landscape assets is important both for our society and for the planning of tourism developments.

Areas with high quality natural social and cultural assets should develop trails or routes which showcase these assets and maximise the experience of the user. Greenways and tourist routes are more than simply a means of travel from start to finish, they provide opportunities for exploring, for stop offs and for deviations from the route. Thus greenways and other routes should always highlight any places of interest, providing the visitor with the option for further exploration if the area of interest is not directly on the route.

Q. 26. What are the opportunities presented by our natural, built and cultural assets? Where are they located? How can they be conserved and their potential harnessed and what barriers exist that need to be resolved?

Cultural heritage, outdoor recreation, experiential tourism and the 'silver market' are some of the tourist areas of potential growth. The Wild Atlantic Way initiative is an example of a regional approach driven by the public sector and strongly supported and developed by the private sector in these areas. Developing the tourism assets that exist beyond the Wild Atlantic Way and in areas which are not traditional tourism 'honeypots' is an area of substantial growth potential. In 2016 25,400 in the Western Region (which covers a similar area to that under the NWRA) worked in the Accommodation & Food service sector which, while it does not fully cover 'tourism' is an indication of its key employment role. Between 2015 and 2016 employment in this sector in the region grew by 39.6%.

Although rural communities face significant challenges they also have key assets such as a rich and beautiful natural environment, cultural heritage, peaceful surroundings and high levels of social capital. These all provide opportunities for diversification and adaptation of the rural economy and its social network to adapt and embrace future opportunities, including improved tourism product and attracting people to live there.

Areas which are often highlighted as drivers of the rural economy such as tourism, green products and services and the creative industries need jobs and innovation policies which are cognisant of the particular characteristics of these sectors in rural areas and address the barriers to their growth. At the same time, the sensitive development of our biodiversity, conservation, cultural heritage and landscape assets is important both for our society and for the planning of tourism developments.

Q. 27. What should a strategy that provides for the development of Regional Trails look like? Where are these potential Trails and what are the potential barriers that need to be resolved.

A strategy which provides for the development of regional trails should be clear about the objectives of the trails and what they are being developed for. Following success of greenways in Mayo and in Waterford there are very high expectations of benefits from trails. While the trail or greenway will bring local benefits, and indeed this is a key reason for the investment, it is important that the main focus is on the user, the users' needs and their expectation of the trails. Otherwise the trail will not be used sufficiently.

Each trail need not have the same objective, nor should it be necessary to seek to attract the same type of user. Areas with high quality natural social and cultural assets should develop trails or routes which showcase these assets and maximise the experience of the user. In the development of trails and greenways access for use of trails on private land is likely to be a barrier. Agreement on routes and the places the trail will go through may also be difficult to agree where there is no obvious or specific route (such as a disused rail line).

Q. 28. Are there best practice models for the management and marketing of our tourism assets that can be replicated for our region?

The management and marketing of tourism assets may be beyond the scope of the RSES, such detail is not likely to be needed in a spatial strategy. However, the RSES should provide the context in which the development of our tourism assets can take place in a sustainable way.

Q. 29. Should the RSES provide a platform for regional collaboration on tourism development for this Region.

Yes, it should alongside other appropriate tourism collaboration and collaborations on maintenance and enhancement of natural assets.

Q. 30. In terms of a Greenways Strategy which crosses County Boundaries, are there priority routes & potential connections which could be achieved within the Lifetime of the RSES?

As the lifetime of the RSES is to 2040, more than 20 years from now, it would be hoped that all of the proposed routes and connections shown in the issues paper would be achieved along with many other regional and local routes.

Q. 31. Would such links provide an experience of directing visitors to places of interest, and towns / villages en route?

Such links should bring tourists to places of regional interest and should also provide towns and villages as well as historic sites or areas of high quality natural environment with the opportunity to attract visitors as well as providing high quality local amenities for people living in the region.

Greenways and tourist routes are more than simply a means of travel from start to finish, they provide opportunities for exploring, for stop offs and for deviations from the route. Thus greenways and other routes should always highlight any places of interest, providing the visitor with the option for further exploration if the area of interest is not directly on the route.

Q. 32. Do you see additional or alternative connections to those outlined above on the NWRA's Draft greenways vision? (See the above envisioned Regional Greenway network, can same be added to or enhanced?)

It is assumed that the draft greenways vision is that shown in map 6. If this is the case then here is a definite need for more north south linkages, for example an inland route from Galway city to Sligo, and also a route which would run through more inland counties from east Galway, through Roscommon and Leitrim to south Donegal. Finally the Inishowen peninsula is another potential area for the development of a greenway or trail.

Section 5: Our Healthy Place

Health

Key Points:

Good access to primary, secondary and tertiary health services is very important. Local GP services need to be a focus of health planning, and access to secondary and tertiary health services needs to be well designed and take full account of the needs of those who are distant from the service. This means there should be good, extensive car parking available at a reasonable price, and for those who cannot drive or be driven, that a co-ordinated travel service for hospital appointments is available.

An increase in the number of tertiary clinics held away from the main centres should also be considered, so that, where possible services travel to the people rather than the other way around.

Q. 33. Where will our healthcare infrastructure and services need to be located to meet the population projection targets identified in the NPF?

Good access to primary, secondary and tertiary health services is very important. Local GP services need to be a focus of health planning, and access to secondary and tertiary health services needs to be well designed and take full account of the needs of those who are distant from the service. This means there should be good, extensive car parking available at a reasonable price, and for those who cannot drive or be driven, that a co-ordinated travel service for hospital appointments is available. An increase in the number of tertiary clinics held away from the main centres should also be considered, so the services travel to the people rather than the other way around.

Older people

Where possible, nursing home and residential care for older people should be provided as close as possible to the neighbourhood where they live so they can remain a part of their community and maintain their social life.

There are also opportunities for towns and rural areas to become more attractive to older people, either by having a mixture of housing options (a town should ideally have people at all stages of the life cycle living there) and also through small clusters of retirement homes or assisted living facilities for people who are still active but need some support services. The needs of older people and the ageing population must be central to Ireland's housing strategy and the NPF.

The working population

Long distance commuting in heavy traffic is known to be a source of stress and can affect people's mental well-being. In combination with better design and the development of other employment hubs it is important that opportunities for e-Working are promoted. Working from home on a regular or occasional basis can help to reduce stress and can provide significant quality of life benefits as well as helping to reduce carbon emissions. Greater possibilities for working from home will emerge with the rollout of the National Broadband Plan (NBP).²⁷

Rural towns and villages

Footpaths and pavements need to be provided in the vicinity of towns and rural villages so that residents can walk safely in a good environment.

In all situations where towns are bypassed or new stretches of road are built, investment in ensuring the older, now lesser used routes are transformed into safe and pleasant walking, running and

²⁷ WDC (2017), e-Working in the Western Region: A Review of the Evidence

cycling routes, is essential. This will allow bypassed towns to gain additional benefit from the initial investment. Local walking and running routes are important to local users as well as attractions for visitors. Not all areas will have enough tourism to justify such investment but development of such routes, by the local community, brings local health and well-being benefits as well as improving tourist potential.

Q. 34 Where will public recreational spaces be provided for citizens and what are appropriate levels?

It is essential that in all designs for the built environment that the needs of walkers and cyclists are considered foremost to ensure that these are attractive options for users. These options need to be easy and safe so that people are happy to make these choices.

Ireland needs to invest in attractive leisure facilities which encourage participation by all age groups and all activity levels. These include swimming, indoor sports facilities and gyms which provide both physical and social benefits to the local population and these should be widely available not just in larger urban centres. While many of these facilities are provided by private businesses, their provision should not be left to the private sector alone, as there are significant health benefits associated with access to good community facilities. However there are many models of effective public and private service provision. Such facilities need to be accessible to all, rather than just to those who can afford them.

Q. 35. How do we enable modes of 'active transport' or 'smarter travel'?

It is important that, when investments are made in our living environments, the impacts on health and lifestyle are considered. The place we live should help us to develop and sustain healthy active lifestyles and improve our quality of life rather than promoting stressful or sedentary patterns.

This consideration of health and well-being should occur in all settings, urban and rural, and should take account of the needs of the ageing population. There should also be a focus on reducing stress that can be brought about by poorly planned built environments.

While the emphasis of this section is on health and healthier places for people to live, it is important to recognise that there are many different health issues and many different lifestyle concerns, and that both physical and mental health are important. We must consider the needs of an ageing population and ways that the built environment can help to promote healthier living at all ages and in all types of places, from city centre to remote rural. There is no one solution and the needs of older people differ from those of the working age population. Clearly, therefore, there is no single planning or investment solution that will address all health issues but it is important that the concept of promoting healthier options is integral to all planning and investment decisions.

Healthy environments

To ensure that we develop environments associated with healthier lifestyles, criteria for granting planning permissions and project developments should always include consideration of the implications for health and well-being. Design solutions making healthy choices more attractive are important (e.g. walking access should be quicker and easier than that for vehicles) and safe places to walk should be provided.

Appraisal methods used for public projects need to include consideration of health and well-being benefits, either through qualitative or quantitative measures, which encourage designs which inspire more healthy choices and which will build healthier lifestyles.

Developing liveable neighbourhoods is also important. In urban and town areas this involves good walking, running and cycling access and well-designed green spaces. In more rural areas it can include footpaths and safer walking areas either off road or on a safer road margin than is often the case at present.

Q.36. How much of the necessary infrastructure is available to deliver smart healthcare in our region?

We do not have this information.

Q. 37. Will this region have the capability to have and retain adequate expertise and human capital to deliver modern healthcare?

There have been some difficulties in attracting and retaining qualified people at all levels of the health services. Many of the reason and solutions to this are beyond the scope of the RSES.

However, by encouraging innovative thinking in relation to models of healthcare, especially in the remoter or more rural areas of the North West, and by enabling planning of more innovative solutions the RSES can provide a planning context within which solutions are enabled.

Encourage of multi-use building which can provide for outreach healthcare clinics or other public services to be provided on different days could encourage provision of more local services and benefit smaller towns bringing more people in to avail of the services.

There are concerns in rural areas about primary care provision attracting a local GP. Again solutions are beyond the scope of the RSES but planning to integrate service provision at key sites (both towns and buildings) could enable different solutions including options for group practices which provide dispersed services.

The main contribution, however, that can be made by the RSES is in ensuring that all parts of the region are seen as attractive places to live and work, attracting a variety of people and ensuring the attractiveness of a place (both environmentally and culturally as well as practically in relation to infrastructure and services so that people to come and work and once here that they will remain living and working in the North West.

Education

Q. 38. How will early childhood care and education be provided and who will provide it?

It is likely that early childhood education will continue to be provided by local providers. It is important to ensure they are provided close to built up areas and ideally in the vicinity of existing primary schools. This will minimise drop off journeys of parents and will also facilitate continued afterschool care. The detail of early childhood education is probably beyond the scope of the RSES.

Q. 39. How will the education needs of our larger towns and cities be able to meet the population projections in the NPF, is the existing capacity of the sector sufficient?

What is needed to be done to increase human capital at a regional level?

Key Points:

Increasing human capital at a regional level has three key purposes: to provide a skilled labour force; to improve employability and life skills for individuals; and to stimulate entrepreneurship. All three must be seen as priorities when developing regions' human capital.

Greater collaboration among education and training institutions at all levels and alignment of education and training provision with areas of regional strength and future employment growth, as well as provision of transferable and entrepreneurial skills, will be most effective in enhancing regions' human capital.

Providing a skilled labour force

Improving the skills and competencies of the labour force at a regional level will help increase productivity and attract investment. It is critical for regions to have the right mix of skills, across all education levels, to meet enterprise demand especially in future growth sectors.

Regional enterprises need to be closely involved in identifying skill shortages and future needs, inputting to course design, facilitating lifelong learning and upskilling among their employees and providing feedback to the further and higher education institutions on the employability / work skills of recent graduates.

The Regional Skills Fora are an important step in increasing coordination and long term planning among education and training providers in response to regional enterprise needs. From the long term perspective of the NPF, the focus needs to be as much on future growth sectors and trends as on current demand for skills e.g. the over-focus of the apprenticeship system on construction trades and its subsequent near collapse clearly illustrates the importance of ensuring that education and training provision targets a broad range of sectors and transferable skills. The recent overhaul and broadening of the apprenticeship system is a useful example and it is important that, overtime, the system allows new apprenticeships to come on-stream as quickly as possible in response to specific sectoral skills gaps/needs in regions.

Providing a skilled labour force requires increasing the number with third level qualifications. A pool of graduates attracts high value-added indigenous and foreign investment, but graduates only remain or return if job opportunities exist. Therefore increasing the number with higher qualifications in a region involves not just growing the supply of new graduates but also stimulating demand from enterprises and facilitating self-employment.

Within the Western Region, NUI Galway and the three Institutes of Technology (Sligo, Letterkenny and Galway-Mayo) that are currently co-operating under the Connacht/Ulster Alliance are key regional assets. They are working together to meet the criteria for the establishment of a technological university.

Increasing regional human capital also requires in-employment training and management skills development. This benefits individuals and firms, particularly SMEs attempting to move up the value chain or in vulnerable sectors. The Skillnets programme is an example of an initiative that supports such in-employment upskilling and its network approach can be particularly useful for rural enterprises.

Improving employability

For individuals, education level and employability are strongly related. Basic, vocational, further and higher education, as well as training, for those with lower skills will improve their employment chances. However those with low qualifications are less likely to undertake further study.

Ensuring people are job-ready requires upskilling and re-skilling to be based on an assessment of learner's abilities and needs and provide them with the 'right skills' for the types of jobs likely to emerge in their region, across the full spectrum of skill levels. It also requires that those needing upskilling, unemployed and those at work, receive career/education advice and information that is closely linked to actual regional skills demand and areas of future growth potential.

In more rural areas, while courses on general subjects e.g. computer skills, may be provided locally, if participants want to progress or specialise they often need to travel. In 2015 while lifelong learning was undertaken by 10% of adults (25-64 yrs) in Dublin it was only 4.6% in the Border region and 6.5% in the West, partly influenced by lower access to lifelong learning opportunities.²⁸

Access constraints can be addressed through flexible learning options e.g. part-time, online/distance education, outreach centres. This can be particularly important for women who may have greater caring responsibilities. The widespread availability of high speed broadband is required to facilitate distance education and upskilling. As well as the roll-out of the National Broadband Plan, it is necessary to invest in centres for public access e.g. libraries, for those without high speed home access. In addition, improved funding, more flexible routes of progression, recognition of prior and work-based learning and return to study assistance would help increase participation.

A particular focus is needed on young people (15-24) who are 'Not in Employment, Education or Training' NEET. In 2015 15% of young people in the West region were NEET compared with 9% in Dublin. There are substantial regional variations in the issues of NEETs and how they can be addressed. Access is a key issue as young NEETs in smaller towns or rural areas may be unable to access many education, training or employment opportunities unless they own a car. Limited public transport options may constrain many young people in regional locations from access to education, training or employment.

One example is that a person undertaking a Further Education course cannot access school transport services, even if the course is being provided in a secondary school which is serviced by the school transport system. Access to the school transport system should be extended to those undertaking further or higher education courses. As well as increasing access for young people in rural areas, this could also help improve the financial viability and sustainability of school transport.

Stimulating entrepreneurship

One in five of those working in the Western Region is self-employed, higher than the share in the rest of the state. Entrepreneurship and business skills are a key component of human capital development and critical for regional development and job creation. Entrepreneurs, new and experienced, regardless of scale or sector face a very challenging business environment. Supports for entrepreneurs, including recent graduates, such as soft supports (mentoring, advice), incubation space, marketing, online trading, entrepreneurship and website development need to be continued and expanded and access to them made as easy as possible.

²⁸ Solas and Expert Group on Future Skills Needs (2016), Regional Labour Markets Bulletin 2016

Entrepreneurship education is critical. Developing business skills across all education levels and disciplines opens up the possibility of self-employment from a young age and widens the options for new graduates and jobseekers to become 'job shapers'.

Q. 40 What would a technological University look like in this region?

Key Points:

A technological university in the region would act as a focal point for applied higher education and training in the region, attracting students and resources and being a facilitating factor in inward economic investment. It would be a dynamic driver in the region creating energy for generation of enterprise, wealth and social and cultural cohesion. It would be a partner with industry and employers in the region, developing applied research programmes, and shared centres of practice as well as providing training and education based on the regions needs and its growth opportunities.

A regional technological university has the potential to contribute significantly to the Irish economy and to regional development and develop critical mass in research areas as well as more extensive opportunities for students arising from its broader subject base and multiple campuses. It would have a key role in enhancing the lifelong learning agenda and a strong regional identity which would attract research funding, international students, export earnings, generation of spending locally and enhancement of the synergy between regionalisation and internationalisation, in terms of foreign investment. A technological university in the North West also has the potential to help rebalance growth ensuring all our regions are making important contributions to the national economy.

A technological university in the region would act as a focal point for applied higher education and training in the region, attracting students and resources and being a facilitating factor in inward economic investment. It would be a dynamic driver in the region creating energy for generation of enterprise, wealth and social and cultural cohesion. It would be a partner with industry and employers in the region, developing applied research programmes, and shared centres of practice as well as providing training and education based on the regions needs and its growth opportunities.

It would provide multi campus innovation hubs for the region and areas for enterprise innovation as well as creating focused under-graduate and post graduate programmes which are responsive to the needs of the regional current and potential enterprise. Industry specific training programs would use Industry equipment and new technology as well as supporting the development of user tools and environment.

The technological university should be multi campus but have a strong central strategy, with centres acting coherently but with individual campuses having specialities in research and teaching and responding to the needs of employers and enterprises in their localities. It should also have cross-campus learning networks through e-learning and a universal module system.

The technological university would enhance the region's ability to lever inward investments, to attract research funding and domestic and international students. It would be the location of expertise in research, innovation and programmes delivers at points convenient to the client base thus facilitating the development of new local markets. Student numbers (especially part-time and work-based) would expand in response to regional business needs. It would align and simplify programmes in a framework of pathways, degrees, modules and credits and expand and develop e-learning and flexible learning.

The technological university could be more responsive to a wide range of businesses, industrial and professional needs and more proactive, since the breadth of its subject expertise, together with its integrated structure, would allow the development of multi- and interdisciplinary subjects. This would enable it to be at the forefront of innovation and the creation of new ideas and to access a wide range of expertise in each discipline area, providing opportunities to offer electives/options

and new, industry relevant, packages of modules and to teach in a technology-supported way across campuses and off campus using distance learning options.

Q. 41 How can 'upskilling' needs be future proofed and through what structures can flexible further education and training be best provided, taking account of the cross-border working practices, e working, communications deficits etc?ee the above envisioned Regional Greenway network, can same be added to or enhanced?).

Key Points:

To ensure that upskilling is future proofed and accessible to all in the Northern and Western Region, education and training content needs to be relevant to employers both within the region and to the industries that are likely to establish a base within the region.

The delivery of education and training is increasingly on a 'blended' basis; part in a classroom, or 'on the job' basis and part on-line and 'remote' from the trainer, usually from home. This online element and increasingly also class based delivery require quality resilient broadband.

To ensure that upskilling is future proofed and accessible to all in the Northern and Western Region, education and training content needs to be relevant to employers both within the region and to the industries that are likely to establish a base within the region.

The recently established **Regional Skills Forum** as well as the **Regional Education and Training Boards** are a vital resource in tailoring, adapting and delivering relevant and appropriate education and training ensuring that local businesses can access the skills they need. The **Regional Skills Forum** was originally established on a pilot 3 year basis and this needs to continue on a permanent basis.

Online delivery

The delivery of education and training is increasingly on a 'blended' basis; part in a classroom, or 'on the job' basis and part on-line and 'remote' from the trainer, usually from home. This online element and increasingly also class based delivery require quality resilient broadband.

Currently much of the West and North West do not have access to quality broadband services, so for example 50.6% of households in County Leitrim are with the 'intervention area' of the Government's National Broadband Plan. Certainty and speed are now required, certainty that government policy will deliver the National Broadband Plan and that it will expedite this process as soon as possible. It will also be important, given that the National Broadband Plan is a 25 year contract, to ensure that robust regulatory arrangements are enshrines in the National Broadband Plan to ensure quality broadband services at a competitive price to all.

Section 6: Our Connected Place

Public Transport

Q. 42 What policy interventions or initiatives can be introduced to encourage a greater number of people (and commuters) to choose public transport over private cars, and how can these inform the RSES?

Key Points:

Some of the analysis on car dependence and car use assumes that the use of the private car is always by choice, implying people have a choice. Many Western Region residents do not have any choice but to use their car to travel to work, education and health services and retail and leisure activities. Given the service levels within the Western Region, largely only those living in the centres of Galway and Sligo can reasonably expect to access services using public transport and it will likely be only a subset of these will be able to access suitable services to meet their needs.

There are a range of policy interventions which will be required to encourage greater take-up of public transport and reduced car dependence. Some of the specific initiatives are discussed below. There are a couple of overarching observations which should inform policy and practice to promote public transport use.

1. Public Transport Choices

Some of the analysis on car dependence and car use assumes that the use of the private car is always by choice, implying people have a choice. Many Western Region residents do not have any choice but to use their car to travel to work, education and health services and retail and leisure activities. Given the service levels within the Western Region, largely only those living in the centres of Galway and Sligo can reasonably expect to access services using public transport and it will likely be only a subset of these will be able to access suitable services to meet their needs.

For those living outside these centres there are some public transport options, particularly intercity services, however often the service levels are so poor that they are not a reasonable option and so the choice is not available.

2. National Transport Authority

The National Transport Authority has a remit to undertake a range of transport functions on a national basis which include

- Procure public transport services and to develop an integrated, accessible public transport network;

However when originally established it was the transport authority from Dublin only and while its geographic remit has been extended, the focus seems to be largely focused on the transport issues of the Eastern region, where the NTA itself notes:

There remain some specific additional functions in respect of infrastructure and the integration of transport and land use planning in the Greater Dublin Area, reflecting the particular public transport and traffic management needs of the Eastern region of the country comprising approximately 40% of the State's population and economic activity.

Furthermore the NTA has additional functions reserved for the GDA including to 'Undertake strategic planning of transport and Invest in all public transport infrastructure'. The WDC considers that due to its original mandate and its additional functions with regard to the GDA, the NTA has been focused on the transport needs of the GDA. The NTA should also be mandated to undertake strategic planning of

the transport needs of all regions. This would allow a coherent overview of all transport services on a regional basis and an identification of where service levels need to be invested in.

3. Public Transport Interventions

Public Transport: Bus

Key investments:

Investment in infrastructure and services including Bus Stations, Timetabling and ticketing, Rural transport services, PSO services and new transport hubs are all required and are detailed below.

A Review should be undertaken of the entire bus network across the region to identify new service routes and strategic locations for the creation of new, high quality transport hubs which would facilitate passengers to easily switch between services.

Options such as licensing ‘bundles’ of routes, where, in order for a commercial operator to receive a license for a profitable inter-city or urban route it would also be required to provide services on a number of rural PSO routes (and receive the PSO subvention) should be explored.

Improved timetabling and ticketing to encourage greater take-up of this, more sustainable, transport mode.

In the context of Brexit, cross-border bus services must be maintained and if possible services increased to encourage modal shift from car to bus. Current agreements in relation to use of travel passes should also be maintained.

As the most important mode of public transport (70% of all public transport journeys in 2015 were by bus and all forms of bus transport had increased journeys in 2015, National Transport Authority), and in the context of an ageing population and the need to achieve Ireland’s climate and energy goals, infrastructure investments in bus transport must be central to modal shift from car to bus transport must be central to capital investment over the longer term.

Bus transport services, as well as being used by commuters, are extensively used by younger and older age groups, those with a disability, recent immigrants and other relatively socially disadvantaged groups. Bus transport can be particularly important in a rural context to address social isolation and facilitate access to services. Bus transport is an important element in ensuring equitable development.

Any strategy to reduce carbon emissions must include initiatives to increase bus usage. Increased frequency of services, integration of services and Quality Bus Corridors in cities and larger towns will all be needed to increase modal shift to bus. Opportunities for the use of biogas in bus services could provide another route to improved sustainability.

The WDC believes that the Exchequer should fully support continued public subvention of bus services in less populated, rural areas through PSO services and the Rural Transport Programme as a key public service for rural residents, including allowing them to access services in urban areas. Bus transport is a key element in promoting both sustainable and equitable growth

To improve take-up in relation to Bus services there are a number of key priorities. These include a scheduled programme of fleet renewal and expansion for the public bus companies should be clearly set out in the Capital Plan to provide for new and replacement buses to maintain fleet quality and safety. This should take place alongside a planned schedule of refurbishment and upgrading of bus

stations, including provision of adequate free or competitively priced car parking, based on an assessment of current conditions should be included in the Capital Investment Plan.

As well as current bus stations, a review should be undertaken of the entire public bus network to identify strategic locations for the creation of new, high quality transport hubs with convenient and free or competitively priced car parking facilities, which would facilitate passengers to easily switch between services. An example could be Charlestown, Co Mayo where North-South routes from Limerick/Galway to Sligo/Donegal intersect with East-West routes from Castlebar/Ballina to Dublin. Public/Private approaches to the development of such transport hubs could be considered.

A key challenge in expanding bus transport is increasing frequency of services, improved timetabling and smart ticketing to increase the integration of services. Current timetabling often does not facilitate passengers to transfer between services and reduces the attractiveness of bus as a mode of transport. As well as facilitating residents to access health, education, recreation and other transport services in urban areas, integration and timetabling are important for increased bus usage by tourists visiting regional and more rural locations.

The Rural Transport Programme is particularly important to older, younger and socially disadvantaged groups living in rural areas providing access to services in their local town or larger centre. With an ageing population, the demand for such services is likely to continue to grow. They can also contribute to increased sustainability by reducing car dependence in rural areas. Maintenance of current services and increased investment should be included in the Capital Plan.

PSO services are socially necessary but financially unviable routes. As these services have a public service element, and are an important connection for rural residents often to access services in urban centres or connect with inter-city public transport, the Capital Plan should clearly support continued public subvention of rural PSO routes. Options such as licensing 'bundles' of routes, where, in order for a commercial operator to receive a license for a profitable inter-city or urban route it would also be required to provide services on a number of rural PSO routes (and receive the PSO subvention) should be explored.

In the context of Brexit, cross-border bus services must be maintained and if possible services increased to encourage modal shift from car to bus. Any impact from Brexit on the current all-island agreements that facilitate provision of cross-border bus services should be minimised. Current agreements in relation to use of travel passes should also be maintained.

Roads & Critically Enabling Projects

Q. 43 Does the list of seven capital projects (as detailed above) represent the key priority projects within our Region? Are there other projects which are of a regional significance?

Ultimately, the priority infrastructure projects will be those projects that will help support the objectives of the NPF and associated RSEs to achieve more effective regional development. If it is accepted that the spatial pattern of development which is described in the NPF Consultation as ‘business as usual’, is not desirable, then an alternative approach is required. If the second tier cities, other larger urban centres and rural areas are to play a greater role in the economic and social development of the country, these centres will need to be supported through investment in infrastructure.

Along with the projects identified the list below represents the key critical roads projects in the Western Region.

National Roads

Key investments:

The additional priority national primary road projects that need to be delivered include:

- New bridge and approach roads over the Garavogue River in Sligo – in Capital Plan.

National secondary routes are critical for inter-regional linkages and ensuring access from rural areas to services and employment in larger urban centres. Priorities include:

- N59 (Ballina Relief Road; Crossmolina–Ballina)
- N60 (Castlebar–Claremorris)
- N61 (Athlone–Boyle; Boyle Bypass; Roscommon Bypass)
- N83 (Ballyhaunis Outer)
- N84 (Ballinrobe Bypass)
- N56 (Dungloe–Glenties – in Capital Plan; Mountcharles–Inver – in Capital Plan)
- N59 (Moycullen Bypass – in Capital Plan).
- N5/N26/N58 Turlough to Bohola.
- Ensure completion of all road improvements outlined in priority list for current plan, but not yet complete.
- Identify and address emerging bottlenecks/improvements needed to support border communities in light of Brexit.
- Identify and address emerging bottlenecks needed to support the objectives of NPF. National secondary routes not completed in Current Capital Plan

Regional and Local Roads

Key investments:

Increase regional and local roads funding to allow road maintenance programme to be enhanced and to improve roads that have not been maintained to the appropriate standard.

Improvement (realignment/ widening/ surface works) for regional and local roads that provide access to key regional centres, key transport hubs and to the national road network.

It is important that we continue to prioritise investment in key regional roads in line with RSEs priorities. It is also important to ensure that funding is available for the maintenance of local roads so that, at a minimum, they are in suitable condition for travel without causing vehicle damage.

There are almost 91,000 km of regional and local roads in Ireland (30,878 km in the Western Region), which accounts for 94% of the country's roads network and they carry around 54% of all road traffic. These are therefore very important to the Irish economy and society as a whole. Given the length and variety of regional and local roads in the Region the details of investment in individual road projects is not considered.

At the most basic level a good road network, commensurate with the population and demand level, is essential to allow people to travel to work, access services and to make areas accessible. Regional and local roads are the backbone of travel in Ireland and allow for travel within a rural region but are also important links to the national road and rail network. Spending on regional and local roads has been severely reduced since 2008 and consequently maintenance has been cut back and the quality of the road network is disimproving.

It is essential to ensure that communities isolated by distance or weak national roads have improved quality of road access to local towns, their key regional city and to ports and airports.

Key routes to and from the existing motorway and national road network need to be prioritised in the Regional and Spatial Economic Strategies (RSES). It is important that these local and regional roads are maintained to a reasonable standard according to their traffic load for local importance. It is essential that there is a planned cycle of maintenance implemented by the Local Authorities who manage these roads.

Policy will also influence the infrastructure investments needed. The need to lower carbon emissions will help influence infrastructural investments (for example supporting cleaner transport modes) such as electric vehicles.

There is little recognition of the potential importance of electric vehicles (EVs) in contributing to a more renewable transport system, especially in rural areas, even though a significant rise in their use in rural areas has the potential to reduce carbon emissions and improve efficiency. In order to ensure that EVs are sustainable they need to use renewable electricity. The development of the grid to support the expansion in electricity demand is discussed below.

Q. 44. Outside of major road projects, do you consider any additional capital projects which should be identified as priorities for our region, and in what way would these bring significant added value?

The state should capitalise on the capacity already available and 'sweat' the state investments already made across the range of transport modes including, rail, airports and ports infrastructure. For example given capacity constraints at Dublin Airport, the other international airports with spare capacity such as Ireland West Airport Knock should be positioned and supported to deliver a stronger international offering to and from the Regions. Other examples include the rail network, Ports infrastructure, educational infrastructure (Institutes of Technology), Health facilities and Housing.

All of these represent significant infrastructural resources available in the region, which the state has already invested in and many of which have spare capacity. It is logical therefore that these should be leveraged to drive regional growth and where possible alleviate capacity constraints at bottlenecks in other centres, notably Dublin airport, Dublin Port and the M50.

The Costs of Congestion

The Department of Transport, Tourism and Sport has undertaken research estimating the costs of congestion in the Greater Dublin Area (July 2017). Estimating the value of time lost due to

aggravated congestion²⁹, the research values the cost at €358 million in 2012 – the base year), rising to €2.08 billion per year in 2033.

These costs are considerable and need to be assessed in the wider context of spatial balance and regional development and the capacity which is available in the regions, such as international air and sea access ports which can help reduce some of these congestion costs.

Appraisal and Selection

There is a need for an appraisal and evaluation methodology which accords the NPF goals and objectives a higher value. To realise better spatial balance, there will need to be a change to the conventional appraisal and evaluation methodologies, which are typically used to determine what projects are given the go-ahead. The traditional cost benefit approach will naturally favour the larger and often largest population centres as the impacts are likely to be felt by a greater number, wherever the project is being delivered.³⁰ The impact on the wider spatial balance of the country and the extent to which the investment is supporting the NPF goals will need to be factored in.

Additional capital projects are outlined in the following sections.

Q. 45 Are there examples of soft infrastructure that proved successful, and which could serve as a template for the future?

Key investments:

- Further capital investment in enhancing infrastructure and facilities at NUI Galway, Galway-Mayo Institute of Technology, Institute of Technology Sligo and Letterkenny Institute of Technology is needed to ensure that the full benefit of previous state investment can be realised and that the role of the higher education institutions in economic growth can be maximised.
- Investment in further education and training centres and facilities across the region is also needed to ensure upskilling across all skill levels.

Further and higher education has an important role to play in regional development and growth. Educational institutions build a region's human capital assets, attract and retain talent. Higher education brings knowledge creation, knowledge transfer, cultural and community development and innovation to regions. It can also stimulate entrepreneurship.

Within the Western Region, NUI Galway is a key regional asset and economic driver. It greatly contributes to the economic development of Galway city and its wider hinterland and is an internationally recognised centre of research and teaching excellence. In addition the region is home to three Institutes of Technology (Sligo, Letterkenny and Galway-Mayo) that are currently co-operating under the Connacht/Ulster Alliance, with the goal of creating a technological university, an initiative that has the potential to expand the contribution of higher education to regional development in this area.

Further capital investment in enhancing infrastructure and facilities at NUI Galway, Galway-Mayo Institute of Technology, Institute of Technology Sligo and Letterkenny Institute of Technology is needed to ensure that the full benefit of previous state investment can be realised and that the role of the higher education institutions in economic growth can be maximised.

²⁹ Congestion levels above those which would be expected on a properly functioning busy road.

<http://www.dttas.ie/corporate/publications/english/cost-congestion-main-report>

³⁰ http://www.dttas.ie/sites/default/files/publications/corporate/english/common-appraisal-framework-2016/common-appraisal-framework2016_1.pdf

Investment in further education and training centres and facilities across the region is also needed to ensure upskilling across all skill levels. Investments by the Education and Training Boards need to be closely aligned to identified regional skill needs. In more rural areas, while courses on general subjects e.g. computer skills, may be provided locally, if participants want to progress or specialise they often need to travel. Access constraints can be addressed through flexible learning options e.g. part-time, online/distance education, outreach centres. The widespread availability of high speed broadband is required to facilitate distance education and upskilling. As well as the roll-out of the National Broadband Plan, it is necessary to invest in centres for public access e.g. libraries, for those without high speed home access.

Rail

Q. 46 Is there scope for increasing rail activity from the region or into the region?

Key Points:

Rail activity serving the Western Region can be enhanced through a more strategic policy focus, better service levels and additional investment.

The longer term role of rail, serving a population in the NWRA region that is growing, and with an increasing need to reduce carbon emissions, positions rail as an increasingly important travel mode. When considering priorities for development or areas in which sustainable development opportunities are available, it is important to consider how the location of housing and employment along public transport corridors, such as intercity rail routes, allows significant possibilities. It is important to consider the rail network as an asset with huge potential to enable more sustainable development in many regions.

While commuting by rail is 'relatively' negligible outside of the Dublin area, this in part reflects the lack of services available to commuters, which are relatively limited. In the Region the only notable commuting services are Athenry to Galway. Commuting by rail to many urban centres is likely to increase following further population and economic growth and where the road network becomes congested and there is an attractive rail offering.

As outlined in Q42 the role of the National Transport Authority in the GDA of *Undertake{ing} strategic planning of transport* needs to be extended to the NWRA region. This will allow an overall assessment of strategic planning along the rail network within the Region and also identify and promote better integration with bus services which can help increase patronage levels on both modes.

Rail lines serving the Western Region have relatively high patronage levels, however proposed investment plans do not seem to be priorities for investment on these routes. For example, Iarnród Éireann proposals to reduce rail journey times on some inter-city routes and not others is in direct response to the improvements in the motorway network and the relative competitiveness of road versus rail, largely south of Galway and the M1 corridor. The cumulative effect of little funding for both road and rail on some routes (to the North West) is rarely evident from a broader, transport accessibility point of view³¹. Once more the role of the NTA in providing a more holistic transport focus with a strategic planning mandate in the Region would be very useful.

Detailed projects which should be identified as priorities are set out overleaf.

³¹ <http://www.wdc.ie/wp-content/uploads/WDC-Submission-to-Rail-Review-2016-Jan-2017.pdf>

Q. 47. Are there Rail projects within our Region which should be identified as priority, and are there rail-lines which are currently unused which could be utilised for alternative recreational uses?

Key Points

- Investments to support increased frequencies and service levels to all routes serving the Western Region.
- Electrification of routes for shorter journey times and emissions savings, in the first instance Dublin to Sligo and Dublin to Galway, thereafter the other routes in the Western Region.
- Passing loops (passenger and freight capacity) in the short-term and double tracking in the longer term to accommodate increased rail traffic.
- Investment to support a more competitive fare structure.
- Better and less expensive car-parking facilities to encourage greater modal shift.

The Government committed to a feasibility study in advance of the Mid Term Review of the Capital Plan designed to identify what supports are required to increase the share of rail freight. This study needs to be completed to inform both investment needed to support the current rail freight traffic and the policy decisions to support a greater modal shift to rail freight so as to realise further emissions savings.

The Dublin-Galway line has high patronage levels (second after Dublin-Cork³²) while the high patronage levels on the Dublin-Sligo line (the third highest passenger numbers after Dublin-Cork and Dublin-Galway lines), illustrate the importance of the line as a transport mode serving the route to/from Dublin and the North West region.

Driven by rolling stock depreciation and the need to reduce our transport emissions and diesel use, electrification of Ireland's railways will be an important policy decision with a need for significant investment. Electrification will have the added benefit of improving journey times and increasing rail patronage and reducing car use.

Improved service levels, journey times and electrification on all inter-city lines serving the Northern & Western Region should all be considered as part of improving transport accessibility. The WDC believes that generally across lines serving the Western Region, service levels, fare structure and supports to improve the attractiveness of rail (such as better car parking facilities) are needed to increase patronage levels.

While commuting by rail is 'relatively' negligible outside of the Dublin area, this in part reflects the lack of services available to commuters, which are relatively limited. In the Region the only notable commuting services are Athenry to Galway. Commuting by rail to many urban centres is likely to increase following further population and economic growth and where the road network becomes congested and there is an attractive rail offering.

Rail Freight

Rail freight, where available, offers several advantages over road transport, for example it generates less than a quarter of the emissions of road haulage, removes heavy goods traffic from the roads and it can provide an alternative efficient route to market, avoiding congested routes. Rail is particularly suited to high volume freight, carried over relatively long distances and for import/export via the ports.

³² National Transport Authority, Irish Rail. Rail Review 2016, p.17

While rail currently moves less than 1% of surface freight across Ireland, most of this rail freight originates in Co. Mayo with three of the four rail freight routes originating there³³. Irish Rail plans to quadruple national rail freight traffic within four years. A projected 4% modal share by 2020 would reduce combined emissions from road and rail freight in Ireland by 3% or a reduction of nearly 35,000 tonnes CO₂e⁴.

The current Capital Plan, *Building on Recovery*³⁴ contained a commitment that, *In advance of the Mid Term Review, the Government will commission a feasibility study to examine options for expanding freight transport on the railways*. This study needs to be completed as soon as possible to help inform both investment needed to support the current rail freight traffic and the policy decisions to support a greater modal shift to rail freight so as to realise further emissions savings³⁵.

Air

Q 48. How can we enable IWAK to truly compete internationally and that this region becomes the access point to the Wild Atlantic Way?

Key Points

Ireland West Airport requires funding for various maintenance and improvements to the main runway, Apron and car parking facilities which are the subject of capital and operational expenditure requests to the Department of Transport, Tourism and Sport. Increased patronage levels will help support the Airport's viability. New EU State Aid Guidelines permit additional aid in exceptional circumstances. The Government needs to support Ireland West Airport Knock in seeking approval for a higher aid rate.

There is an increasing focus on regional airports to be commercially independent with declining State aid rates over a 10 year period to 2025. The impact of this needs to be reviewed over the period so as to ensure the continuing viability of airports in the Region.

International air access via Ireland West Airport Knock is very important to ensure good international connectivity for the Region. Ireland West Airport Knock provides efficient access with over 20 connections both to and from the region to destinations in the UK, and Europe, vital to supporting the various businesses across the region as well as tourism access.

Ireland West Airport Knock serves those areas of Ireland beyond the catchments of the State airports including much of the West and North West. Most of counties Mayo, Sligo, Leitrim, Donegal and part of Roscommon are 'inaccessible' to State airports, defined as those areas with a greater than two hours drive time to any of the State airports.

Though *Ireland 2040-Our Plan* notes that the main airports of Dublin, Cork, Shannon and Knock are spatially located to serve most of the population, the focus of investment and ever greater expansion in *Ireland 2040-Our Plan* is at Dublin Airport despite the spare capacity at the other three main airports and the ability of these airports to serve their catchments and help drive further development in their regions. The current focus on Dublin Airport only serves the 'business as usual' scenario and militates against each of the other airports fulfilling the role envisaged of them.

Improved services at Ireland West Airport Knock and Donegal airport are needed. This will reduce the need for residents in regional locations to avail of services at Dublin Airport which in turn will

³³ <http://www.wdc.ie/wp-content/uploads/WDC-Rail-Freight-Study-Final-Report-18-12-15.pdf>

³⁴ <http://www.per.gov.ie/en/building-on-recovery-infrastructure-and-capital-investment-2016-2021-statement-of-the-minister-for-public-expenditure-and-reform-mr-brendan-howlin-t-d-on-29-september-2015/>

³⁵ http://www.wdc.ie/wp-content/uploads/WDC-Rail-Freight-Insights-Feb_2016.pdf

reduce journey numbers through an already congested Greater Dublin Area. (see note on Congestion costs in GDA). Improved service levels are also needed to allow tourists to access the Wild Atlantic Way directly, especially for those international tourists who are on short breaks and do not want to spend time travelling via Dublin airport.

The role of Ireland West Airport Knock and Donegal airport are particularly important in addressing the challenges and opportunities arising from Brexit given the extent to which the region shares a Border with Northern Ireland.

Q. 49 How can our Airports advance their role in contributing to enterprise and tourist development? What economic opportunities do they provide us?

Key Points:

Ireland West Airport Knock and Donegal airport need to be supported to increase patronage levels which in turn will help support the Airports' viability.

Following a revision of EU State aid rules³⁶, there is an increasing focus on all airports to be commercially independent within a 10 year timeframe to 2024. Since then the regional Local Authorities have taken an equity shareholding in Ireland West Airport Knock, illustrating their recognition of the benefit of the airport to the regional economy.

These EU Guidelines recognise that airports with fewer than 1 million passengers per annum may face difficulty and, subject to a case-by-case assessment, an aid rate in excess of 75% (up to 90%) may be justified in exceptional circumstances, subject to EU approval.

- Ireland West Airport Knock and Donegal airport both need to increase patronage levels which in turn will help support the Airports' viability.
- Ireland West Airport requires funding for various maintenance and improvements to the main runway, Apron and car parking facilities which are the subject of capital and operational expenditure requests to the Department of Transport, Tourism and Sport.
- Investment is needed to support greater connectivity to Ireland West Airport Knock and Donegal Airport with improved connectivity to the national road network a priority.

The regional and local authorities with their equity shareholding in Ireland West Airport Knock, need to ensure a strong cohesive and concerted marketing campaign designed to support the Airport's efforts at building on existing routes and increasing patronage levels.

Q 50. The SDZ designation opens up considerable opportunity for IWAK. Are there emerging sectors / global industries that would be attracted to this region?

Key Points:

To leverage growth possibilities as part of the SDZ designation, support from all levels of Government will be required.

There has been consideration over the years as to the type of sectors that might be attracted to locate in IWAK as part of an SDZ. Such sectors include:

- Global Trading Services; Web, software, Tech support & Languages
- European Centralized Services,

³⁶ <http://www.dttas.ie/sites/default/files/publications/aviation/english/european-commission-decision-re-state-aid-sa.39757-2015/n-irelands-regional-airports-programme-2015-2019/eu-decision.pdf>

- Financial Services,
- Research and Development
- Bio medical devices,
- Light Engineering,
- Electronics & components
- Incubation Units.

Over the medium to long term growth in population and employment, coupled with improved road infrastructure, it is likely that sites adjacent to IWAK could become attractive as logistics hubs. This would be an even greater possibility if air cargo becomes more established at IWAK.

Many international airports, in addition to other sites, seek to attract investment to support economic development at their sites and there is much competition for mobile investment.

Attracting global industries to an SDZ at IWAK will require much effort and backing from local and regional authorities as well as Government support at national level.

Broadband & telecommunications Infrastructure

Key investments:

Ensure the National Broadband Plan NBP (i) is implemented fully (ii) can deliver on planned future EU target speeds by deploying future proofed infrastructure.

The Implementation Group of the mobile phone and broadband taskforce needs to ensure that actions to provide immediate solutions to the broadband/phone coverage deficit in rural Ireland take effect at the earliest opportunity.

There are towns which have not yet had investment in Metropolitan Area Networks (MANs) infrastructure, (fibre rings enhancing broadband capacity in towns). These include Tuam and Westport and should be deployed.

There is a significant imbalance in the equity of digital services; urban centres are generally well served but rural areas have poorer service levels and limited competition and investment. Census 2016 Summary results show that overall, 76.2 per cent of the State's urban households had broadband compared with 61.1 per cent of households in rural areas.

Significant developments in the state intervention in next generation broadband rollout are expected in 2018. Contracts are to be awarded to telecommunications providers to rollout a high speed broadband network as part of the much awaited National Broadband Plan (NBP). These decisions will influence the nature of telecommunications infrastructure investment in Ireland for the next 25 years.

The withdrawal of one of the two remaining bidders has raised concerns about the completion of the procurement process as originally envisaged. Though the NBP plan was published in 2012, the form of the intervention strategy was not published until 2015. At the outset of this process (2015), it was not clear that there would be a multiplicity of bidders. The process to date has navigated a regulatory environment and complied with EU State aid rules to ensure that all potential bidders were treated in a fair and equitable manner.

While the NBP targets include universal access to 30 Mbps download and 6 Mbps upload, there are indications from the EC that new EU targets are being planned. For example there is a draft proposal that all European households will have access to connectivity offering at least a download speed of 100 Mbps by 2025. To ensure we can deliver the speeds of any future EU targets, the use of future proofed infrastructure delivering very high speeds has to be deployed in the planned investment to start in 2018, but will be delivering for the next 25 years.

Recognising that there is some poor 4G coverage and ‘blackspots’ for mobile voice calls, the Government established a Mobile Phone and Broadband Taskforce to identify immediate solutions to broadband/mobile phone coverage. The work of the Taskforce is being monitored by an implementation group which needs to ensure solutions are implemented in a speedy manner.

It is important that mobile phone coverage, 4G and 5G continues to be improved, as this is a key enabler of business transactions and social networks and many rural areas are at a disadvantage because of patchy or non-existent coverage.

Energy Infrastructure

Key Points- Energy infrastructure

The WDC regards the provision of quality energy transmission and distribution networks as important elements of the infrastructure required to underpin the economic development of the region. A commitment to investment in energy infrastructure is important to achieving regional development goals through the RSES.

It is important that investments in electricity network reinforcement are made, which will both allow for the transmission of significant amounts of renewable energy from the region, as well as providing high quality electricity infrastructure for enterprise in the region (both existing and potential).

Lack of gas infrastructure may become a disincentive to investment, reducing a region’s competitiveness and increasing existing disparities. The Strategy needs to be clear about the requirement for natural gas infrastructure in the North West, in particular in the larger towns of Sligo and Letterkenny.

The WDC regards the **provision of quality energy transmission and distribution networks as important elements of the infrastructure required to underpin the economic development of the region**. A commitment to investment in energy infrastructure is important to achieving regional development goals of the Strategy.

Electricity

Electricity transmission and distribution networks are likely to be needed to support the increase in renewable electricity to be used in transport and heat. The west of the country has some of the best conditions for wind energy in Europe and it has very significant potential for ocean energy (both off shore wind and wave), and so it is likely that the transmission infrastructure will be needed at key points along the West and North West coasts.

EirGrid’s Grid25 strategy provided a strategic overview for the development of the electricity transmission system to 2025 and beyond. It was based on a vision of delivering a strong, cost efficient transmission system, which will be essential for facilitating regional economic growth. The element of Grid25 most relevant to the Western Region was Grid West which has recently been cancelled. The Grid West project planned a significant addition to the electricity grid. It was developed in response to the large number of proposals in the North West for renewable energy generation. **This project could also have provided an opportunity to attract industries with a high-demand for electricity to this region.**

The cancellation of this project and its replacement by a very much smaller scale project designed to meet only immediate generation requirements will severely limit options for the development of renewable generation in the west and nationally.

In order to achieve progress towards a low carbon economy there needs to be significantly more electricity generation in the region than demand so electricity produced here is used elsewhere. It is important that investments in electricity network reinforcement are made, which will both allow for the transmission of significant amounts of renewable energy from the region, as well as providing high quality electricity infrastructure for enterprise in the region (both existing and potential).

Gas infrastructure

The Strategy needs to be clear about the requirement for natural gas infrastructure in the North West, in particular in the larger towns of Sligo and Letterkenny. In general to qualify for a connection the towns need to have a large commercial load. The ease with which a town can qualify also depends on the distance from the existing transmission line. Yet initial infrastructure was built without this requirement, so towns at a distance from earlier investments in natural gas transmission infrastructure are disadvantaged. There needs to be a clear focus on the development of this infrastructure in the North West. Letterkenny is relatively close to the transmission line at Coolkeeragh in Derry.

Natural gas availability improves competitiveness in a wide range of industrial applications, including food processing and pharmaceuticals, both of which are key sectors in the Western Region. It provides greater choice for consumers, which leads to greater competition and potentially lower energy prices. Natural gas produces fewer greenhouse gas emissions than other fossil fuels and less solid waste and particulate emissions than other fuels for Combined Heat and Power (CHP).

Industries and businesses in areas without natural gas face higher energy costs, lack of choice in energy supply and face higher carbon charges. Homeowners in such areas likewise face higher costs and use less energy efficient systems. Where natural gas has recently become available, large users (e.g. Allergan in Westport, Baxter Healthcare in Castlebar) quickly switched to natural gas. As the gas grid expands nationally and more consumers (both industrial and domestic) gain access, the availability of natural gas will be taken for granted. Lack of gas infrastructure may become a disincentive to investment, reducing a region's competitiveness and increasing existing disparities.

In order for regions to develop and contribute more to the national economy they must have access to quality services and infrastructure, such as those for energy. Investment in natural gas infrastructure will bring benefits to the North West and to the wider economy.

Options for the future

While the focus here is on natural gas transmission infrastructure there are a number of different options for the future. For example, it is possible to transport Compressed Natural Gas (CNG) which can be brought in bulk by road or rail to the site of demand and can be used directly there or can then be fed into a local network. This possibility is being explored by commercial users in Sligo.

Additionally it is important to remember that energy policy developments in the future are likely to be dictated by climate change targets and the need to reduce greenhouse gas (GHG) emissions. Although natural gas has fewer GHG emissions than other fossil fuels, it is likely that renewable energy will be the choice in the future so it is likely that further development of the natural gas grid into the North West could be important for the transmission of biogas which will be used to fuel freight vehicles, into or out of the region. However it is important that it is planned so as to connect as many towns and users as possible.

Tourist Infrastructure

Q 51. Are there Tourist Projects of scale which can make a significant difference to the Regional & Sub Regional offer to visitors?

There is potential for a number of regional projects of scale in different parts of the northern and western region which would help to attract visitors to the region. Such projects would provide the opportunity for local authorities to work together to enhance the attractiveness of the region.

Q 52. Is there an existing network of cultural or historical attractions, which are outside of the WAW, and which could be combined to offer tourists a world class experience in our Region?

The Shannon river is itself a network of cultural and historical attractions in the Northern and Western region. Rising in Cavan and travelling through the centre of the region, through relatively unvisited places, it provides a significant opportunity for multiple developments networked together.

The Shannon has many sites of historic and cultural significant in the region which would be of interest to visitors. It is also associated with a significant waterway cruising product as well as the country's first blueway which continues to be expanded. The river travels through unspoilt landscape with opportunities for quiet visits as well as activity holidays both on lakes and on land with gentle walks or more strenuous hills within easy reach. Cycle routes on quiet roads and planned excursions through scenic landscapes provide other tourism opportunities along this network.

Such a network would provide the opportunity for local authorities to work together to enhance the attractiveness of the region.

Q 53. How can the RSES best harness the exceptional natural resources, culture and environment our Region has to offer, to ensure a greater proportion of overseas visitors arriving in Ireland travel into the Northern half of the Country?

Q 54. What proposition does this create in our region? Can we understand its potential better?

- Develop the Tourism product: Cultural heritage, outdoor recreation, experiential tourism and the 'silver market' are some of the tourist areas of potential growth. The Wild Atlantic Way initiative is an example of a regional approach driven by the public sector and strongly supported and developed by the private sector in these areas. Developing the tourism assets that exist beyond the Wild Atlantic Way and in areas which are not traditional tourism 'honeypots' is an area of substantial growth potential.
- Ensure good competitive international access to bring tourists direct into the region.
- Ensure excellent transport links within the Region, emanating from IWAK, Shannon, Donegal and Dublin airports to allow international visitors access the entire WAW extending from Malin Head to Kinvara in South Galway.
- Ensure the State tourism agencies drive product development and service enhancements along the Wild Atlantic Way and throughout the regions.
- International Tourism advertising should ensure extensive exposure of the Northern and Western Region and its distinct product offering – Tourism Ireland