



Galway
CHAMBER
I MBUN GNÓ AR SON GNÓ

**NATIONAL PLANNING
FRAMEWORK 2017
SUBMISSION**

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EXECUTIVE SUMMARY

What might ensure the future prosperity and health of our people, region and City is an important question. Building a clear framework for Galway and the region to succeed and prosper has been, and should continue to be, a collaborative process involving local communities, civic bodies, local authorities and the national Government.

In this submission under the National Planning Framework 2040, we set out an ambitious vision for Galway¹. Our vision is one that sees our population double by 2040 and GVA increase at double the national rate. It is an ambitious vision that calls for an integrated approach to development, planning and infrastructure:

Our vision includes the following:

1. Establishment of the Galway Development authority, with responsibility for the development of a master plan for the Central Business District
2. Creation of master plan for Galway, incorporating a mass transit plan extending out to the Ardaun area, incorporating the new industrial and enterprise zones
3. Development of a high speed rail network between Galway and Dublin and increased public transport within Galway, including bus and rail
4. Higher buildings and higher density in the Central Business District
5. The speedy completion of the Galway City Outer Bypass (“GCOB”); an essential transport aisle to allow connectivity for vehicles destined for Connemara, the wider west Galway region and south Mayo
6. The extension of the Port of Galway to accommodate cruise ships and freight
7. A new acute hospital to service Galway and the region, incorporating a medical campus to support greater integration between Higher Education Institutions, medical devices companies, technology providers, pharmaceutical companies and the health service
8. The establishment of a centre for marine research and finance
9. Co-location of national bodies, including ISIF and SBCI
10. Increased emphasis on innovation by providing State agency support for marine, technology, creative industries and medtech accelerators, linked to innovation hubs within the county and region. Greater emphasis and support for the provision of enterprise spaces for start-ups and growth companies

Our collective vision is to make Galway *the* model in Ireland, fuelled by the energy, drive, culture and diversity of the people of Galway, for inclusive innovation and economic growth. Our goals are to:

- Promote and grow quality jobs for all
- Cultivate dynamic, resilient communities across the county of Galway
- Improve the quality of life for all

¹ Unless otherwise stated refers to Galway City and County

INTRODUCTION

Cities are continuously evolving, seeking to become more attractive as places to live, work and play. They are engines of economic growth, as well as the key to our future health and wellbeing. Powers are being devolved to cities, which are increasingly taking control over their own futures and setting their own priorities.

What might ensure the future prosperity and health of our people, region and City is an important question. Building a clear framework for Galway and the region to succeed and prosper has been, and should continue to be, a collaborative process involving local communities, civic bodies, local authorities and the national Government. To this end, Galway Chamber is a founding member of the Atlantic Economic Corridor and is supportive of this endeavour to build a thriving economic corridor along the Atlantic Western regions.

Galway faces a number of challenges. Nationally, the housing crisis means that members of our community are facing longer periods in temporary accommodation. Government finances remain vulnerable as the national debt remains high by global standards. Given the constraints on public expenditure, the national Government is constrained in its efforts to fund required services, including public housing. Unemployment has fallen significantly in recent years but many of those employed are facing challenges, with comparatively high levels of tax, increases in rent and stagnant wage inflation. Internationally, BREXIT has major implications for our tourist and retail sectors and exporters. It is too early to anticipate the changes to be implemented by the new administration in America and the impact of these on Ireland, but we must be observant, prepared and agile and focus on strengthening our domestic economy.

In making this submission, we have considered what would make Galway successful. Urban areas must use resources sustainably and provide a sound economic base that provides the setting for a good quality of life for their inhabitants. Flows of capital, people, and technologies change rapidly, whereas the planning of cities and regions has evolved slowly. In addition, urban areas must be adaptable in order to withstand shocks.

Given the time constraints for the preparation of this submission, there is a limit to the place-specific, sectoral and technical detail that can be included.

We hope that this submission will be received in a positive light, promote discussion and result in a bold, ambitious vision embodied in this submission for Galway, and the wider region.

The Chamber of Commerce remains at the heart of Galway's economy and we offer our full support and that of our members to the creation and implementation of a bold and ambitious vision for Galway.

VISION FOR GALWAY

Galway's future is dependent on its capacity to be a major driver of regional development and a significant contributor to national success. Galway's future success requires the interaction of a dynamic regional capital with a thriving region. The wider global context of new emerging economies and markets, of global innovation and competition for investment and talent presents Galway with both future opportunities and challenges and must inform Galway's economic planning.

Our collective vision is to make Galway *the* model in Ireland, fuelled by the energy, drive, culture and diversity of the people of Galway, for inclusive innovation and economic growth. Our goals are to:

- Promote and grow quality jobs for all
- Cultivate dynamic, resilient communities across the county of Galway
- Improve quality of life for all

Galway and its civic institutions must be an engine for inclusive growth that fights to promote inclusiveness and reduce income inequality. Our city must be:

- A dynamic, attractive city, creating sustainable wealth; a centre of activities designed to facilitate exchanges and to provide high-performance services to businesses and citizens, while pooling infrastructure costs
- A smart city that controls its consumption of energy and natural resources; encouraging responsible use of resources
- A connected city that is well connected by fibre, road, rail, sea and air
- A city that breathes and keeps environmental impact to a minimum
- An accessible, fluid, functional city making urban space better to share
- A city for all, where it is pleasant and safe to live

DYNAMIC CITIES & FUTURE POPULATION

All cities are unique and this diversity means that there is no 'one' future of cities or model pathway to follow. Those concerned with the future of Galway and the wider region must forge a path that results in prosperity and health of our people and place. Whilst predicting the future is impossible, we must attempt to define a path and, therefore, must attempt to understand the drivers of growth that will shape Galway in the future.

Economists speak of the vital future role of dynamic cities in driving innovation and economic activity. Characteristics of dynamic cities include scale of activity, knowledge infrastructure and exchange, sectorial clusters and attractiveness to investment and talent. In 2050, it is forecast that 70% of the increased global population will live in cities. There are now 2,500+ cities with populations greater than Connacht (0.5m.). Many are dynamic cities competing for investment and talent. Galway, a tiny City by global standards, needs to identify, create and enhance its future comparative advantages in this context.

Nationally, Dublin and its hinterland have been the major drivers of the State's development.

- The population of All Dublin is now 166% greater than at the foundation of the State. In contrast, the population of Connacht is now less than it was in 1926
- Since 1991 the population of All Dublin has increased by more than the present population of All Galway (320K. approx.)
- In the West Region, the income per head is 5.0% less than that average, lagging 15.2% behind All Dublin.

The Central Statistics Office has published regional population projections under a number of assumptions of fertility and net emigration. One middle range projection predicts a national population increase of 613,000 by 2031. Of this the Greater Dublin Area (GDA) increases by 401,000 and the West region by 15,000. The annual rate of increase in the GDA (1.0%) is five times the annual rate in the West (0.2%), the State's lowest. A second projection of lower growth predicts a national increase of 320,000 with the GDA increasing by 253,000 and the West declining by 13,000 by 2031. It is clear that new, radical, ambitious forms of regional development are required to reverse these predictions of future comparative and actual decline.

Ireland now has the youngest population in the EU. Within the EU, 21.4% of the population is under 20 with 10.4% under 10. In contrast Ireland has 27.5% under 20 and 14.8% under 10. This presents an unprecedented opportunity to Ireland but only if it can both deliver excellence in its educational systems to develop the talents of its young people and also provide modern employment on an unprecedented scale. A new radical form of regional development could play a significant role in promoting high employment and entrepreneurial opportunities for young people. Galway could lead in this endeavour.

The United Nations report on global Foreign Direct Investment ("FDI") flows in 2013 records that a record low share 39%, went to developed countries. A record high share, 52%, went to developing countries and a historically high share, 9%, went to transition countries. Europe's total of global FDI at 20% in 2013 has fallen from 31% in 2011. Economic development in the future will be more strongly dependent on internationally trading indigenous enterprise and the winning of FDI against intense competition where comparative advantage can be created.

INNOVATION GALWAY AND REGION

The scale of employment creation and enterprise development needed requires new approaches and the exploitation of distinctiveness and excellence. Initiatives should include the following (not in order of priority):

- Improved connectivity, including the creation of a high-speed train network linking initially Galway and Dublin
- The development of an integrated master plan for Galway, including a mass transit plan and the provision of broadband
- The search for the best organisational arrangements to promote local economic development has been a significant task for local governments and their partners for several decades. The approach most widely adopted by local, regional, and national governments is to place some, or most, of their local economic development initiatives under the operational control of an appropriately regulated and supervised Development Authority, rather than to manage them from within a municipal platform (a council department). This approach is now widespread accepted best practice internationally. It reflects an established consensus that economic development activities are unlike the other roles and responsibilities of local government. They are primarily 'market facing' (labour markets, property markets, investment markets, etc.), rather than 'citizen facing', and involve market-based transactions and incentive structures, rather than public service delivery. Development Agencies are especially suited to 'contested' activities such as locational and investment decisions, or 'collaborative' activities (such as multi-party planning and joint ventures). Such economic development initiatives interventions will need to be delivered by market-like bodies and business-led approaches (marketing, joint ventures, incentives, capitalisation, competitive recruitment, etc). It is now widely practiced that this is delivered

through a corporate, rather than a municipal, structure. The Galway Chamber of Commerce advocates the establishment of the Galway Development Authority (“GDA”),

- The designation of the lands, formerly used by Galway Airport, with their prime strategic location, as a Strategic Development Zone
- The further promotion of Parkmore Business and Technology Park as a central major investment location for High End Manufacturing, High Technology Industries and International Services
- The planning and building in Galway City of a Conference/Exhibition/Performance centre of distinctive design to enhance Galway’s role as a major regional Business and Cultural centre.
- The establishment of the Harbour Area of Galway as a leading centre of Marine Technology and Marine-based Industry, including Marine Finance
- The promotion of the regional food and craft industries by the permanent establishment in Galway Inner City of a Country Market. The widening of its regional effect by its coordination/collaboration with some other regional Country Market locations
- The further development of Mervue as a prime centre for enterprise incubation and expansion in strong collaboration with GMIT and Enterprise Ireland
- The retention of retailing as a core function of the city centre is a long established tenet of national planning policy and we wish to protect and reinforce the strategic role of the city centre as the prime retail area in city, county and the western region. Retailing supports the considerable investment by the public and private sectors in the city centre, by providing shopping facilities to residents and by adding to the vitality and attractiveness of inner areas of cities, which is also important in the context of the tourism sector. Shopping has become more an experience than a functional activity. It has become an attractor to visit cities and consequently support a much broader economy than the single activity of purchasing an item.

COUNTY AND CITY – GROWING BETTER TOGETHER

The delineation between county and city is arbitrary; where really does the city end and the county begin? What is of paramount importance is that long term planning must be inclusive irrespective of geographical demarcation and must ensure that both rural and urban grow better together.

Hard-pressed towns must be helped to create new economic opportunities. Villages and small towns serve a role in the economic, social and cultural well being of Galway County, yet many are struggling to cope with job losses, depopulation, empty buildings and poor infrastructure.

Geographic location should not dictate prosperity, but we must be cognizant of the fact that urbanization is increasing as populations are tending to move to cities where services, higher education institutions and cultural activities are centred. Decentralisation largely failed, although it can be argued that it was a worthwhile experiment. The trend towards urbanization, notwithstanding growth in the county based on the aforementioned arbitrary demarcation, is irreversible and therefore it is necessary to consider how towns can prosper.

TOWNS WITH A PURPOSE - COMMUNITY DEVELOPMENT LED PLANS

Agricultural transformation and the pull of higher wages in cities and abroad reduced the rural population. We have, though through careful planning, seen examples of the re-emergence of vibrant towns in the West of Ireland. These towns, embodied with a renewed civic pride, have a purpose.

Towns across the county of Galway must be supported to firstly organize and then to develop a long-term plan, which clearly articulates the purpose of the town. A town, nor in fact a city, cannot exist purely for historical reasons. They must exist for viable reasons.

Capacity building typically associated with community development will lead to improved economic outcomes. Support must be provided to help towns develop leadership and entrepreneurial skills and appropriate funding must be provided to support such initiatives. Due to depopulation, which has social as well as economic effects, many towns no longer have the civic bodies that once existed and thus towns need to be supported to develop the required of these. Civic bodies should be encouraged to be proactive, future-oriented and embrace change. Corporate success stories such as Valeo in Tuam and the successes of towns such as Newport in Mayo should be documented to help the reconstituted civic bodies to develop their own purpose.

DORMITORY TOWNS/ VILLAGES

Dormitory towns/villages have arisen for a number of different reasons. A town may lose its main source of employment, leaving its residents to seek work elsewhere. In other cases, a pleasant small town attracts more residents over time but not large businesses to employ them, requiring them to commute to employment centres. Often, however, dormitory towns form when workers in a region cannot afford to live where they work and must seek residency in another town with a lower cost of living.

From a policy perspective, an adequate transportation infrastructure, including road and public transportation systems must be developed, as well as the necessary zoning of lands. The recognition that some towns exist as dormitory towns and will have little in the way of local employment opportunities requires planning in terms of the integrated movement of people. Park and ride or park and cycle routes should be created at confluences of major roads.

ECONOMIC GROWTH OF GALWAY AND REGION

Economic growth that can benefit the West Region² will largely centre in the areas of highest urban population, of which Galway is the largest. Galway must have the ambition to lead growth, not just in a regional context, but in a national context. This significant shift in economic and population growth is required to halt depopulation of the region and a continued exodus of our young people.

Addressing this growth challenge in a National and EU context requires that we reverse the current public and political acceptance that the West Region is in decline and that we insist on investment equity with the other regions on the basis of population and access to natural resources. This submission is a pragmatic economic proposition that counters the current lack of investment in the Region. It is an economic initiative targeted to raise the Gross Value Add (GVA) per person within the Region.

The suggested strategy for enterprise development in Galway and the Western Region should be based on three objectives:

- a) Create sustainable **Clusters of Enterprise** that are innovation led, export oriented and that greater emphasis is placed on the natural resources of the region.
- b) Provide **Growth and Employment** for all young people joining the workforce, attract new people with special skills and provide flexible employment for part-time contributors and for an ageing population.
- c) Cause a significant investment and focus on the **Development of Natural Resources** with a specific focus on Blue Growth. This should encourage greater rural and coastal community engagement and cross sector co-dependence.

The development of Galway should provide socio-economic balance giving equal strategic focus to the development of social and private enterprise.

The need to “future proof” the growth of existing and new clusters with an ample supply of skilled and experienced people calls for a deeper integration of the Higher Education Institutions into the Enterprise Ecosystem. Embedding these Institutions in all large enterprise development centres, parks and districts will allow for more effective matching of skills output to employment need and a better pathway for IP and technology to enterprise.

The capacity of the Higher Education Cluster in the Region to respond to specific social and enterprise need can be an economic development differentiator. Their core responsibility to produce high quality graduates and new research discovery and knowledge can be further extended to a far deeper engagement within the Region. This can enable cultural change, greater participation in society and the economy, and prepare people to adapt as technology influence increases and global economics dictate a faster pace of change.

² References to the West or Western region encompass areas covered by the Atlantic Economic Corridor (“AEC”). The Atlantic Economic Corridor is an initiative of the Chambers of Commerce of Tralee, Limerick, Shannon, Ennis, Galway, Roscommon, Mayo, Sligo, Leitrim, and the American Chamber of Commerce. Collectively representing 80,000 employees, in 2,725 Irish-owned and multinational firms in the mid-west, west and north-west.

INNOVATION LED ENTERPRISE STRATEGY

Galway benefits from FDI in high value jobs and spend in the local economy. It has created, over the last forty years, a human capacity and a “can do” working culture that has fuelled other enterprise development. This legacy and foundation is central to new growth, whether it is new foreign direct investment, indigenous investment or new capital investment in natural resources. Increasingly FDI is attracted to certain regions by the availability of skilled employees, a creative, innovative and vibrant start-up econ-system and a high quality of life for employees.

It is important to further strengthen existing clusters such as ICT, Life Sciences, Medical Devices and Technology, Arts, Culture and Tourism, by providing specific enterprise development resources to help smaller companies provide technology, products and services to those sectors. Where existing clusters can gain new mandates from a focus on regional assets or natural resources, such as Marine ICT, there should be a specific development focus that can leverage such resources.

The opportunity to develop growing clusters such as Ocean Technology, Gaming & Creative Media, Data Analytics, Marine Tourism, Education and Health offers Galway a unique possibility to infuse innovative and creative talent into professions and organisations. This unique combination of enterprise and innovation would give new and emerging sectors the creativity and energy required to develop faster in Galway. Investment in these emerging sectors depends on innovative talent, a good base of education and research and the facilities to competitively address their respective markets.

Central to attracting such investment will also be the availability of properties that are suitable for the sector. This quality and specification of facility will range from the availability of “clean room” environments to the use of medieval historic locations to inspire creativity. Providing an array of facilities that are affordable to smaller and new companies will attract entrepreneurs and companies from within and outside the Region. The associated costs and benefits of living in Galway and the surrounding towns and villages may well be the greatest differentiator in an overall enterprise investment decision. The value and quality of housing in such areas offering life style choice have proven to be the most significant factor in the growth of particular regions in the USA.

The development of new enterprise will also be based on attracting entrepreneurial talent who have access to a fourth level foundry of IP and technology and who can live in a place of choice and preference. The creation of innovation and incubation facilities that are connected to the HEI Cluster but rooted in the enterprise centres, are critical to the development of the City and region.

The renewal of the City should focus on providing facilities and infrastructure to support small and emerging enterprise, both social and private. The further development of the Innovation District within the City, with links to regional innovation, the Higher Education Institutions and Galway Harbour, would add a unique feature to the City. This form of development would also attract larger enterprise, including Multinational Companies (MNC’s), who seek talent, ideas and technology.

ENTERPRISE ZONES

The development of the **Harbour District** as a business and enterprise heartland for Galway will recast the City. The development of the harbour will bring with it new business and technology investment, far beyond the commercial benefit that will accrue from transport and or tourism. The creation of an international **Marine Technology Hub**, linked with the Galway City Innovation District (see below), should attract significant international mobile investment to Galway.

Galway Chamber, working with Enterprise Ireland, Start Up Galway, the Local Enterprise Office, third level institutions and others, set up a not for profit company, Galway City Innovation District (“The

GCID”), in 2015. This company has leased and developed The PorterShed, which opened its doors for business in late Spring 2016. The PorterShed, providing co-working space and a soon to be launched technology accelerator, currently houses around twenty companies and eighty people and hosts a range of events for the start up and wider business communities.

Planning of the City’s Industrial and Enterprise infrastructure must focus on people movement within the City and make mobility easier for those living within and those living in the surrounding region. There is an opportunity to transform older industrial areas within the City and create a **City Enterprise Park**. The Mervue Industrial Estate, including its extension toward the City centre on one side and its extension through the Crown Development site towards the by-pass on the other, is an ideal choice. This could form a modern in-City Industrial and Business Park, with a transformation programme to modernize the buildings, significantly increase the density and refresh the portfolio of industry and enterprise. This site, properly serviced with modern public transport, would add to the vibrancy of the City centre. Equally, it would provide employment to the greater Galway area given its proximity to the dual carriageway.

The Airport Complex is suitable to create an **Airport Enterprise Park**. It is a large zoned enterprise area on the edge of the City and proximate to the east-west and north-south motorways. This is an ideal site for new large developments that might include a new emerging cluster such as Creative Media, include infrastructure for large film studios and /or use of the private airfield to support work carried out within a chosen sector. Other uses could include the development of a life sciences cluster with access to a large medical centre and access using the private airfield.

Natural resources are abundant in the West of Ireland and are largely underdeveloped. Agriculture, which is established in smaller farm holdings, is underdeveloped. While its current status is an outcome of National and EU policy over many years, there is an opportunity to create a generational shift in agriculture and, specifically, in Agri-food.

The successful development of small manufacturers of dairy product in the South of Ireland is an outcome of support from the larger players in the food sector, leveraging the science and technology of a Technology Park run by Teagasc. This Public-Private investment surpassed expectations in terms of the numbers of new companies and products that come through there. Such a development in the West with Teagasc could be supported by local authorities through an investment in a **Covered Food and Craft Market** to promote local food, create a unique hospitality character and attract people into the City. This would equally serve producers of craft products and artists looking to create small business opportunities within the surrounding towns of the region.

Tourism in the West of Ireland is dependent on two very basic natural resources – the beauty of our landscape and environment and our people. The opportunity for Galway City to be an iconic cultural hub for the West of Ireland has barely been explored. The richness of the City’s culture and arts is known far and wide, yet it is a fragmented often socially dependent resource base.

The opportunity for the City to release brown field sites and create socially engineered enterprise and community that can create a vibrant iconic City for arts and culture is immense. A particular focus and investment in the medieval part of Galway City to create a **Medieval District** would add greatly to the development of Arts and Culture and support a rich Tourism experience. Such a district could also be home to the creative arts, including new growth technology sectors such as Creative Media.

The City must also be the centre point for the region’s tourism, enterprise and commerce, where travellers from all over Europe, the Americas and beyond meet. A major deficit in the infrastructure of Galway is the availability of a multi-purpose event venue. Creating this kind of infrastructure within

the City, or at the Medieval Harbour, to host significant international events would greatly boost business in the City. Investment in a **Galway Conference, Performance and Exhibition Centre** would add to the attractiveness of Galway, providing a boost for tourism and the number and size of conferences that could be hosted in Galway.

Whether business or tourist visitors travel by land, sea or air, the recreational and transport infrastructure calls out for further development. Many of the larger projects for roads, rail and ports are underway and must be strongly supported. A plan for a major relief road around the City and the planning of a future public transport system need to be accelerated, specifically in the context of doubling or quadrupling tourism and enterprise. As a large urban destination for enterprise and tourism, Galway can become a rail, road, sea and air hub, given its planned port and easy access to two international airports.

MEDICAL DEVICE

Eight of the world's 10 largest medical device companies are located in Ireland, with Europe's premier cluster of device companies based in the Galway region.

Within the industry, there is a rapid drive towards convergence (medical device, technology and pharmaceuticals). This convergence requires a new skill set. A new model of products as a service is emerging, blurring the lines between where the factory ends and the hospital begins. In order to retain and attract medical device companies, greater emphasis must be placed on deepening the ecosystem. New initiatives such as the operation of a hospital sandbox, where innovations can be tested and access to patients is provided in order to obtain feedback, should be encouraged in Galway.

Increasingly, there is an overlap between hospitals and the commercial operations of high-end manufacturing of medical devices. In order to create a sustainable environment of the medical device industry, a new set of skills are required. This necessitates close alignment between the industry and HEIs. Medical device companies have a global workforce, working environment is key, including both infrastructure and lifestyle. The lack of broadband, and traffic issues are key impediments to future expansion within Galway. A much more integrated approach is required, including an integrated approach to the built environment.

CULTURE & TOURISM

Culture is embodied in social groups, places and spaces. The provision of public spaces is an important dimension of culture, as are the governance structures that overlay most cultural activities. Culture plays strategic and instrumental roles important in binding communities, creating a sense of place and assisting the growth of our tourism and attracting FDI.

Culture encompasses fine arts, physical artefacts of heritage, commercially orientated enterprises (bars, restaurants etc.) and sporting facilities. The creative industries have expanded through the means of live performance, music, television and digital platforms. Creative industries now account for a significant component of economic output and employment. Culture, within Galway, is defined by many cultures and sub-cultures, which creates our unique identity.

Tourism is a strategically important component of our economy. Galway is experiencing a shortage in hotel rooms; occupancy rates within the City are reported at 80%. There are currently around 10,000 hotel rooms in Galway. A lack of supply puts Galway's attractiveness at risk. The capacity of the Galway to cope with the expected large numbers of visitors in 2020 is a particular concern.

Barriers to building hotels include lengthy planning processes and a lack of competitive development finance. Galway Chamber believes that the number of hotel beds available in the city needs to be increased significantly.

To ensure the sustainability of Galway as an attractive destination, we must develop and, as such, we must look to:

- Capitalise on the “once in a lifetime” opportunity than 2020 European City of Culture represents to the tourism sector in Galway
- Promote Galway’s central position on the Wild Atlantic Way; encourage local communities to research and develop local tourist attractions that can be combined into a visit to Galway
- Continue to enhance Galway’s image as a Good Food destination. This area has received a significant boost through Food On The Edge (successfully staged in 2015 and 2016) and the award to Galway of the European Region of Gastronomy 2018
- Tap-into the growing demand for active/sport holidays by promoting friendly cycle ways and other activities
- Promote and improve accessibility into our lesser known attractions such as NUIG Zoology & Marine Biology Museum, the James Mitchell Museum and the Computer and Communications Museum
- Development of a cohesive tourism strategy for the lakelands and waterways of Galway, including the development of a coordinated events programme. Further development of waterways infrastructure to support recreation and tourism
- To meet the growing need in the tourism industry, fully serviced campervan parks should be created close to the City and throughout the County
- Galway city of the future must provide an immersive experience blending the physical environment and history of the city with technology. Investments must be made in the ICT infrastructure to support this immersive experience and people manage visitors.

We must also look at our product and ensure that it remains relevant in a changing world. A recent report found that China and other emerging markets are the main forces that will drive the travel industry in the future. The rapidly growing middle class in China will see it overtake the U.S. as the world’s largest outbound-travel market this year. We must be prepared to capture our share of this growing market, ensuring that our product caters for the needs of the Chinese and other emerging market tourists.

COMMUNITY

There is a need to refocus on the participation of communities directly in the regional economic development plan. This new focus will directly engage communities in the creation of new enterprise that is community led on a cooperative and not for profit basis.

Community led enterprise requires a new system of governance that recognises the importance of the flexible employment and equity interest that is based on employee participation and community voluntary involvement. The community led enterprises require new incentives to encourage their establishment and encourage micro investment directly by members of the community

Community led enterprise is specifically suitable in certain sectors, including tourism, food and social care.

PEOPLE AND SKILLS

The development of private and community level enterprise is critically dependent on the availability of the requisite skills and people. The focus must be:

- On the pre-positioning of critical skills and competence in new areas and existing areas of technology to enable the development and expansion of existing sectors and investment in new sectors
- It must also focus on the existing labour profile to ensure that new investment meets the employment need of the existing working population
- To stem the flow of graduates from Galway and the West of Ireland. Galway city has the highest concentration of STEM workers in the country, but in excess of 50% of graduates from certain disciplines leave the region to find employment.

Highly skilled people are required to rapidly increase the number of high-value jobs within the region. Community led enterprise as a valued form of training and contribution is required to provide flexible employment for a broader range of people and skills and quickly reduce the source of dependence within the region.

Investment in people and skill development must be rebalanced within the region to provide a ripple focus on those people required to service the employment opportunity at each level. This requires an immediate focus on the development of low-level skills in the technical service and trade areas.

The matching of the current profile of skills available within the region to new investment opportunities requires specific support and funding within the region; this is an area of critical importance to achieve the goals set out and requires a new level of focus and of thinking.

GOVERNANCE

How Government goes about implementing the NPF will be as important as the steps taken to prepare and design it. In order for the NPF to truly effect change, significant emphasis must be placed on developing a robust governance and implementation structure.

Collaboration is a key feature of successful implementation. As major contributors to local and national Government funding, the business community should be involved in policy development and implementation.

NATIONAL & LOCAL GOVERNMENT

Understanding the interaction between the local and national Government, and how EU and national policy impacts Galway, is critical when thinking about how Galway is designed, developed and delivered.

Local authorities must promote growth and build their asset base. They need to invest in growth to enable the creation of new assets, which produce rateable income to meet service needs and finance infrastructure, which then enable the creation of further new assets.

The Galway Chamber of Commerce believes that State agencies such as ISIF and the SBCI should establish offices in Galway.

PLANNING

It is abundantly clear that concerted action needs to be taken to address Galway's housing and office space crisis. Civic bodies, state agencies, local and multinational businesses are increasingly frustrated by the lack of City based, grade A office space and appropriate space for start-ups and growth companies. Anecdotal evidence suggests that Galway has lost out on FDI projects, which would result in the expansion of jobs in the region, and FDI companies willing and disposed to locate in Galway have gone elsewhere due to the lack of available office space. The growth of indigenous start-ups and SMEs is also restricted by the lack of enterprise space.

The Harbour District, encompassing State lands owned by Galway Port and CIE lands (adjacent to Ceannt Station) should be designated as the Central Business District ("CBD"). Existing planning restrictions on density and building heights should be relaxed within the CBD. Greater density taller buildings will provide much needed housing and office space and will lead to increased productivity gains from the transport infrastructure.

Planning is a local, national and often European issue. In order to meet the current housing, office space and infrastructure crisis within Galway, a number of measures need to be undertaken:

- Locally, fast-tracking the planning process must be part of the solution to what is a complex issue but this must not be at the exclusion of engagement with stakeholders
- Establishment of the Galway Development Authority is key to the development of the large areas of land currently in the ownership of the State
- Nationally, existing planning policy and legislative environment must be streamlined.
- Sustainability standards in all new housing developments should be set nationally. The aim is for energy efficient, long-lasting housing with minimal impact on the environment

NATURAL RESOURCES AND INFRASTRUCTURE

A more strategic, integrated, long-term focus on infrastructure is required - in particular, more certainty and stability in planning, and a clearer vision for infrastructure planning is required. This will enable all stakeholders to take the long-term view, based around agreed priorities. The case of Galway Port is a good example of delayed decision-making that has tied up valuable development land in the centre of Galway for decades.

Providing appropriate and sufficient facilities, utilities and serviced infrastructure to meet the challenge of economic growth creates a challenge for both urban and rural planners. It is an opportunity to refocus on efficiency, affectivity and the utilisation of infrastructure. It provides an opportunity to develop green and brown field sites to meet social and economic need. It opens up creative options to transform social dependence to social enterprise while rejuvenating the City and Medieval Centre. The innovative use of space and buildings, coupled with the development of new iconic but sympathetic buildings, will be required to meet the growth challenge set out earlier.

As a result of BREXIT Ireland will become the most physically isolated and peripheral country within the EU and this will have a significant impact on our ability to compete on equal terms within the Single Market. This peripherality is already a factor in recent decisions of the various finance houses to move to Central Europe (from London). Within Ireland the NUTS Regions, West and North West, will be the most peripheral, yet both of these regions are currently excluded from the €28bn EU TEN-T (2015-2020) funding. Under the EU principle of subsidiarity the decision to exclude the West and North West was taken by the Irish Government.

In the interests of Irish and European solidarity, both the Irish Government and the EU must address the post BREXIT physical isolation of the West and North West NUTS Regions. Both Irish and EU experts in transport, logistics and communications need to come up with a plan to address how the additional costs associated with the build-out of the required infrastructure be minimised and how we can compete and participate on an equal basis within the Single Market.

In addition to spatial planning, the planning of facilities such as water supply, wastewater, solid waste and information and communication technologies is required.

THE ENERGY SECTOR

There is an abundance of renewable energy opportunities within Galway and along the Atlantic Economic Corridor. Galway is leading the way as a green energy producer and is a net exporter of “green” electricity. The ability to produce green energy is a key factor in attracting future FDI as multi-national companies seek to lower their carbon footprint. Within the region there are significant opportunities to make further investments in wind, wave and solar. Taking a regional perspective, this could prove a major attractor to energy hungry sectors, such as dark cyber facilities.

Such opportunities include:

- 80% of Ireland’s wind and wave energy lies to the west in our Atlantic Ocean; 90% of our sovereign land lies under the sea.
- Much of the untapped oil and gas reserves lie in the North & South Porcupine Basins, Corrib and Slyne Basins, Erris and Rockall Basins, Celtic Sea and Fastnet Basins.

PORTS AND AIRPORTS

Investment in the development of our ports and airports within the greater western region has become a source of controversy and dispute. It is negatively impacted by a Dublin centric view that is focused on population growth and not economic return. The rationalist view of infrastructure seeks to close key infrastructural assets and regard infrastructural assets as liabilities.

It is necessary in planning for economic growth of Galway, that all regional stakeholders promote the alternative perspective i.e. infrastructural assets are good. Galway Chamber supports key development plans for ports at Foynes, Galway, Rosaveal and Killybegs. Likewise, it supports the development of two international airports at Shannon and Ireland West. All such infrastructure must be in place if the Region is to benefit from growth and, specifically, from the development of tourism and Marine based natural resources.

98% of trade on this island has arrived or departed via the sea on a ship. Other than for a small percentage of high value or perishable goods, connectivity to our trading nations is only economically possible through our ports. Transport modes must have a seamless connectivity primarily at the interface of all main ports and harbours. This connectivity allows efficiencies in moving goods throughout the island networks.

In the context of Galway, the extension of the port allows for the capturing of opportunities as outlined in the July 2012 report "Harnessing Our Ocean Wealth". The relocation of commercial shipping out of the medieval harbour and downstream allows for plans to breathe energy back into the City's quays and its waterways, an improved quality of life for Galwegians and the development of a new all-year round tourist experience which will bring new commerce to the Medieval City. A new port to accommodate cruise ships, where a visitor can walk from their cabin to a Medieval City, will significantly increase the value of tourism to Galway and the Region.

The opportunity to link cruise to plane and become an international hub for the global traveller is an ambition that must be explored. A new deep-water port that is served by two international airports can create niche business and tourism opportunities. Both airports provide excellent connectivity to continental Europe and the USA. The completion of the M18 will support ease of access from Galway to both airports and positively impact Shannon Airport and Ireland West Airport at Knock. It is important that both airports operate independently.

ROAD AND RAIL

The infrastructure with the greatest impact on business and the general public is road and rail. The development of the road network has had a profound effect on other infrastructure, most notably the need for regional airports. The completion of the M18 (Gort to Tuam) by end of 2017 adds investment substance to an enterprise and transport corridor between urban centres allowing a conduit of commercial activity spanning this important motorway.

The high proportion of private car transport for commuting to work remains an issue. Public transport is a viable and preferable alternative to the private car. Equally, car-based shoppers, diners, tourists, concert and theatre goers are a critical component of city's ecology and economy. Failing to acknowledge the role that private vehicles play will be detrimental to the retail, leisure and tourism sectors, and could lead to Galway city becoming a 'donut' city with an empty city centre.

The City and County Councils should continue to support the development of public transport in Galway by supporting greater density and height as this improves the economic returns to investment in public transport.

The fifth bridge spanning the river Corrib (Galway City Outer Bypass (“GCOB”) is an essential transport aisle to allow connectivity for vehicles destined for Connemara, the wider west Galway region and south Mayo. The development of West Galway and its coastal area is dependent on improved access to the main motorway network. The completion of the fifth bridge over the River Corrib is critical to the economic development of the Region and to tourism generally in the West. This bridge and route will reduce congestion in Galway City, reduce carbon emissions, improve life quality for its citizens and allow for improved cycle lanes and bus routes due to reduced car traffic.

Galway Chamber would also like to support an integrated multi-purpose eastern expressway of some 5kms linking the City with suburban areas of the East side of the City. As this side of the City continues to expand rapidly, there is an opportunity to create a new expressway along the southern face of the Dublin-Galway railway. This could include the City Development Plan objective to create a coastal promenade from Roscam to Barna, whilst protecting the coastline from erosion. This new expressway would enhance public transport by allowing a 10 min round trip bus loop from Eyre Square to the residential area of Renmore by use of a Quality Bus Corridor (“QBC”). It can also accommodate a cycle lane encouraging better commuter choice and creating a leisure and tourism attraction between Medieval Galway and Oranmore.

The creation of a cycle lane network, to include Barna and Moycullen, is already proposed along the old railway line. The development of an integrated cycle lane network will have a significant and progressive impact on Galway and its outer town. It will encourage citizens in these outlying towns to cycle to the City in a safe and free flowing way in both directions.

The development of the rail network needs greater evaluation. The opportunity to develop a high speed rail network, linking Galway to Dublin and Galway to Limerick, public commuter service, and freight infrastructure needs consideration.

The Chamber regards the dual road and rail option as a necessary one for growth and the expansion of the City and County. In this regard, we welcome the proposed development of Ceannt Station and the continued development of this hub as key for both leisure and business traveller.

Only 0.2% of goods in Ireland are moved by rail. After shipping, rail is the next most environmentally friendly transport mode. With the completion of the M18 (2017) and GCOB (2020) the development of Athenry as a main rail hub in the West should be considered. In planning the town’s infrastructure, land capacity along the railway line (land zoning) should be reserved for connectivity to the port by rail, allowing Athenry to become a transshipment hub for goods. The development of a rail commuter and freight proposition will be a strategic consideration for the development of the new port.

HEALTHCARE

Hospitals play an important role within our society. They are a place of learning, education, innovation and primarily, a place of healing.

Public hospitals are the cornerstone of our healthcare model and have been the main drivers of medicine and health technologies. Public hospitals must be aligned with all providers in the continuum of care.

Galway and Saolta University Healthcare group urgently need a new acute hospital to safely manage the healthcare needs of the region. The current ageing facilities at University Hospital Galway (UHG) are not fit for purpose and do not provide an appropriate environment to safely manage the current and future care needs of the population of the West/Northwest.

Galway University Hospital (“GUH”) Provides Dual Clinical Functions:

1. Secondary care to the population of Galway city and county and adjacent parts of counties Mayo, Roscommon and Clare.
2. Tertiary care for the 900,000+ population across the 6 West/Northwest counties (Donegal, Leitrim, Sligo, Mayo, Roscommon and Galway). Saolta University Healthcare Group is unique among the hospital groups having only one level 4 hospital (UHG) for this population, supporting four level 3 hospitals (Mayo, Sligo and Letterkenny) and one level 2 hospital (Roscommon).
3. There is no clear medium/long-term strategic vision for acute hospital services in Galway and the region.
4. UHG is one of the busiest hospitals in the country but has one of the greatest challenges in managing access for emergency and elective services.
5. The current UHG site is a city centre campus consisting of multiple, predominantly low-rise buildings dating from the early 1950s, spread across a congested site with poor access for patients and staff. The infrastructure is neither adequate nor safe for the optimal delivery of high quality modern healthcare.
6. The unplanned evolution of the Saolta University healthcare group has resulted in a major increase in demand for tertiary services in Galway, further exacerbating the capacity deficits in UHG.
7. The current ED at UHG (second busiest in Ireland) is clearly not fit for purpose in size, layout or capacity. While the proposal to build a new ED on the UHG site is welcome, it does not address the serious underlying capacity and infrastructure deficits throughout the rest of the hospital.
8. Galway urgently needs a new hospital to facilitate the delivery of safe high quality acute, elective and cancer care for all our patients across the West/Northwest, now and into the future.
9. A new hospital build on the Merlin Park site has been suggested as the best location for a new hospital build. Its location on the east of the city in a relatively greenfield site adjacent to the major road network to the south, east and north would facilitate improved access for the majority of the region’s population.
10. The new hospital should be developed as part of a medical campus supporting greater integration between Higher Education Institutions, medical devices companies, technology providers, pharmaceutical companies and the health service. The medical campus could further support an institution focussed on disabilities.

‘GREEN’ AND ‘BLUE’ INFRASTRUCTURE

Our marine resource encapsulates not just renewable and fossil energy but the building blocks of planetary evolution. 50% of the air we breathe comes from life that lives in the sea. Harnessing our Ocean Wealth and participating in the EU’s Strategy for Blue Growth, will create employment in the new and expanding areas of the Marine. This includes the protection of this environment, the

recovery of carbons, the farming of fish, to the provision of smart technologies to enable and manage the sustainable exploitation of those resources.

Developing our marine resource in a sustainable way will bring economic benefit to the coastal communities, counter population decline in these areas, and safeguard the nature and knowledge of those coastal communities who are the natural guardians of our Marine.