



**Waterford
CHAMBER**
IN BUSINESS FOR BUSINESS

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To Whom It May Concern,

As the voice of Waterford business since 1787, Waterford Chamber appreciate the opportunity to make the enclosed submission in respect of *Ireland 2040 – Our Plan*, the national planning framework guiding strategic planning and development over 20+ years.

In framing our contribution, we have considered our city's advantages and opportunities. The latter are primarily around higher education, land zones available for strategic development, air, sea and land transportation; tourism and recreation.

Few projects have more potential to influence our country's future and shape tomorrow's Ireland. The consultative process in drafting the plan is a positive democratic exercise and affords the country a once-in-a-generation opportunity to reflect on how all of Ireland can be and contribute to a constructive dialogue about how the country's potential can be harnessed to benefit current and future citizens.

We wish all of those involved well with this initial pre-drafting phase and the subsequent rounds through to the plan being adopted. We are also encouraged by your 'Issues and Choices' paper favouring a focus on fewer and larger centres of population rather than looking to spread development thinly with diluted and even counterproductive results.

The economic uncertainty caused by Brexit and the change of administration in the U.S. makes it even more important that Ireland has a realisable plan with a vision for the country but also a roadmap for how to deliver that vision through proper planning. For Waterford, we seek growth – not for its own sake but so that we can realise our potential. Indeed, in our ambitions to grow, we are also conscious of the need to protect our great quality of life.

Yours sincerely,

Laurent Borla,
President, Waterford Chamber

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Waterford 2017 - Snapshot

Waterford is Ireland's oldest city and, according to preliminary results from Census 2016, saw population growth of 3.5% to 48,369 in the five years to April 2016. During the same period, the population of Co Waterford increased by just 1.4% to 68,032. The intercensal period saw the South East (Carlow, Kilkenny, Tipperary South, Waterford and Wexford) record population growth of 2.7% to 511,070. The equivalent national population growth rate for the same period was 3.7%.

Accounting for 7.7% of the country's economic output in 2013, the South East continues to underperform economically – something that will persist unless Waterford City can achieve its full potential as a regional economic powerhouse. Unemployment among those aged 15-74 in the South East was 9.4% in Q4, 2016 compared to 6.7% nationally.

In January 2017, there were 36,952 people on the Live Register in the South East and there are particular issues around youth and long-term residual unemployment.

The South East region has a rate of early school leaving that is considerably higher than the national average (13% in Q4 2013 vs national average of 8%). Two-third of those unemployed in the region did not continue formal education beyond secondary school.

The Regional Labour Markets Bulletin 2016 published in October last by the Skills & Labour Market Research Unit at SOLAS found that wholesale and retail (31,400 people in Q4, 2015) was the largest employment sector in the South East, followed by industry (27,000) and health (24,600).

Knowledge intensive services accounted for 10% of employment. The same analysis of CSO data found 70% of the 30,000 employed in professional occupations in the South East work in the public sector.

With Ireland's population projected to increase by as much as 1,000,000 over the next 20-25 years, there will inevitably be a certain level of population growth in Waterford as the country's fifth largest city. For the city to achieve its full potential and become a true regional capital driving a much stronger South East region, Waterford Chamber contends that the city's population needs to double to approximately 100,000 by 2040.

This ambition has obvious implications for housing and service provision as well as job creation and infrastructure investment but nothing less than this rate of growth will enable the city to compete successfully and play its part in more balanced and effective regional development – offering a counterpoint along with Cork, Galway and Limerick to greater Dublin.

Strong cities drive strong regions and a Waterford that is achieving its potential will contribute far more to the South East and the country as a whole than it can do at present. In short, Waterford stands ready to play its part in Ireland's journey to 2040 and has tremendous untapped potential.

Building on Strengths

Accessibility - Waterford benefited from significant roads infrastructure investment during the Celtic Tiger period and the M9 motorway connecting Dublin with the city, the Outer Ring Road and the N25 Waterford City Bypass are very valuable assets that we will continue to see an economic return from as we grow further.

Agribusiness – Notwithstanding the uncertainty arising from Brexit, the food sector remains hugely important to Waterford and the South East with major employers such as Glanbia, Dawn Meats, ABP and Flahavan’s based here. Capacity also exists to capitalise on the entrepreneurial culture and artisan foods capability which we have within in the city and county. Examples of the tremendous work of GIY, which has its headquarters based on our city, Walsh’s Bakehouse, also city based, and Chia Bia, operating from Tramore, demonstrates the potential to increase sustainable employment opportunities in agri related sectors, including production, technology and tourism.

FDI & Indigenous Enterprise – In addition to the agribusiness sector, Waterford has developed distinctive industry clusters around the Pharmaceutical/Med Technologies and Engineering/Advanced Manufacturing sectors. These clusters, providing significant employment growth opportunities, are not only aligned with capabilities and clusters in the wider South East context, but also across the greater Southern Region into Cork and Mid-West to Limerick.

Welcome progress has been made in attracting additional foreign direct investment in recent years from IDA Ireland client companies such as Sanofi, West Pharmaceutical Services, Inc., Bausch + Lomb, Tech Mahindra and RouteMatch.

Waterford must also continue to broaden its economic base and develop a stronger indigenous sector. In this regard, encouraging progress has been made in a short time by ‘home-grown’ companies such as nearForm, Eishtec, Schivo, Q1 Scientific, EirGen Pharma (now part of OPKO Health, Inc.), FeedHenry (now part of Red Hat Mobile) and NutriScience (now part of Swedencare Group). These can in turn help inspire a new generation of start-ups who now have positive role models and exemplars.

Port of Waterford – The Port of Waterford is a very valuable strategic asset in a regional and national context. As well as its direct economic impact, the Port is an important enabler of economic growth and one of the region's key attractors to prospective investors with an eye to international markets.

Quality of Life – Perhaps appreciated most by those who relocate here, Waterford offers a tremendous quality of life with short commute times, ready access to tremendous coastline and mountain ranges and a human-scale urban environment that still offers great amenities. This is something we already see helping to boost our attractiveness for inward investment and start-ups as increasingly mobile investors favour our excellent quality of life over the congestion and higher costs of Dublin.

Tourism – Waterford has made significant progress in developing its tourism offering with a busy calendar of festivals and events helping raise positive awareness of the city nationally. The Viking Triangle and House of Waterford Crystal are also an attractive proposition that set a high standard for continued investment in the city’s urban fabric and public realm.

Another very exciting amenity for locals and visitors alike that will be fully open soon is the Waterford Greenway, a scenic walking and cycling route along the disused railway line from the city to Dungarvan, Co Waterford.

Waterford Airport – For more than 30 years, passenger services to/from Waterford Airport have been a key socioeconomic asset for the South East region. As well as supporting tourism and helping connect our diaspora, it is a vital link for business – whether it be in allowing ease of access to visiting executives or facilitating export-oriented businesses in the South East to access UK and European markets.

Waterford Institute of Technology – WIT is consistently ranked in the top tier of Irish higher education Institutes. Its impact on Waterford and the South East region is considerable. In 2016 WIT provided higher level education opportunities to 49% of students from County Waterford schools who accepted a programme through the CAO system (Wexford 27%, Kilkenny 22% and Tipperary South 25%). Through its graduate pool, WIT contributes very significantly to the talent base available for industry in Waterford and beyond. WIT has strategically developed pinnacles of research excellence in particular disciplines such as ICT/Mobile Services, Advanced Manufacturing and Pharmaceuticals. These centres have collaborated effectively with regional industry and these innovation centred collaborations have created the conditions for attracting high value employment to Waterford and the wider region. Researchers from WIT compete successfully for global research funding and the work done at the Institute’s Arclabs Research & Innovation Centre has already delivered very considerable positive results with spinout companies creating hundreds of sustainable jobs. The Institute is also a major local employer while the student population are substantial direct contributors to the city’s economy and social environment.

Waterford 2040 – Investing for Growth

In considering how our city can grow in a sustainable and positive way during the timeframe covered by *Ireland 2040 – Our Plan* and reduce our reliance on public sector employment and a relative small base of large-scale private employers, Waterford Chamber has identified a series of opportunities that, taken together, can unlock Waterford's potential and set us up for success.

Boundary Extension – In their report to the Minister for Housing, Planning, Community & Local Government published in February 2017, the Waterford Boundary Review Committee recommended that the boundary of Waterford City & County Council be extended into Co Kilkenny by including the electoral area of Kilculliheen and parts of the electoral areas of Aghlish and Dunkitt south of the N25 Waterford City Bypass. This is a compromise, cognisant of County identity, as Waterford Chamber and Waterford City and County Council originally recommended an extension covering a greater area.

Such a measure will immediately add c4,500 to the population of Waterford City but – more crucially – the inclusion of this area in the city will improve service delivery to those who live there now and in the future and ensure Waterford can grow and develop in a more sustainable and balanced way on both sides of the River Suir.

The boundary extension must happen. If this opportunity is lost, the growth of this key regional area will be stymied and won't reach its potential. In that situation, Waterford and by extension the South-East region loses out. Waterford City, along with the other three Atlantic cities, is geographically key to provide balance to Dublin. The report rightly states that there is no effective alternative to a boundary extension, it simply won't work. For Waterford City to grow, it needs one clear vision and one clear voice, as opposed to two sets of political and executive leadership. There cannot be different goals, internal competition influences and vested interests.

It is understandable that Kilkenny would prioritise development of its county capital, mainly around a vibrant centre, over its lands on the doorstep of Waterford. However, in doing so, it prevents Waterford City from developing concentrically around its own city centre. In nearly 100 years, while Waterford City has expanded hugely, the planning policies of Kilkenny Council have shown limited investment in the Ferrybank area. The failed implementation of the Planning Land Use and Transportation Strategy for the area which was developed collaboratively between the two Councils, proves without any doubt that dual control will not work.

At a critical time when foreign investors are demonstrating their confidence in Waterford City in a significant manner, the political system must assume its responsibility and do what is best for the long-term benefits of the South-East. The boundary extension must be implemented with immediate effect so Waterford and the South East can continue its development towards greater economic prosperity.

Connectivity – Notwithstanding the investments made in the 2000s, significant deficiencies remain. While we greatly welcome the ongoing works on the N25 New Ross bypass which will help alleviate a considerable bottleneck on the Rosslare-Waterford route, further investment will be required while the same is the case for the N25 Cork-Waterford route.

However, a key priority must be the development of motorway connectivity between Waterford to the M8 and onwards to Limerick. If that was completed, we would then have motorway connectivity between the cities of Waterford, Cork and Limerick and ultimately to Galway. This measure would greatly enable these four cities become real economic drivers for their respective regions.

This need for improved connectivity between Galway, Limerick, Cork and Waterford was underlined by the Irish Academy of Engineering in their May 2016 publication on Ireland's Atlantic City Regions.

The Academy rightly recognised the importance of improved links between these four cities not only to our individual economic and social performance but also to allow us more effectively counter-balance the ever-growing dominance of the greater Dublin area.

More efficient and cost-competitive public transport within and to/from Waterford is also vital to supporting population growth. Taking a longer view, a third river crossing of the Suir – this time downriver – will also need to be advanced in the coming years to support future development and growth.

Connectivity through next generation Broadband provision is essential for business in Waterford and accelerated investment is required in order to compete and to trade internationally. Fast broadband also supports the potential for regional development which will enhance the competitiveness of the South East region.

North Quays – The designation of eight hectares of vacant riverside lands on the North Quays in Waterford as a Strategic Development Zone (SDZ) was announced by government in January 2016. Previously used for shipping and storage before the Port of Waterford relocated in the 1990s to a more appropriate site downriver at Belview, Co Kilkenny, this land-bank in our city centre core has tremendous potential – something recognised in national policy for at least a decade.

The creation of a new, vibrant urban quarter on the North Quays with a potential mix of high-quality offices, hotel and residential accommodation will mark a huge leap forward for Waterford and represent a tremendous statement about the city's future. Connected to the existing city centre by an iconic pedestrian bridge, development at the North Quays will enhance our city centre and more fully open out our riverfront which is a huge underused amenity right at the heart of the city. In line with urban planning in many European cities this site has significant potential to become a vibrant innovation district in Waterford, a future hub of employment opportunities and economic growth.

Port of Waterford – While the Port of Waterford Company is satisfied that it can accommodate envisaged expansion to 2020 within its current facilities at Belview, it also recognises that subsequent growth will require increased capacity. Accordingly, the Port of Waterford is preparing a masterplan that will set out the type of infrastructure investment required to 2040 so the Port can continue to play a key role in facilitating international trade and respond to shifting customer demand and the global trend towards ever larger vessels.

The rail freight link to the Port at Belview should also be further utilised as it is a sustainable way to transport large volumes of goods.

The Port's future will be boosted by continued investment in the Belview Industrial Zone where Glanbia Ingredients Ireland operate the first greenfield primary dairy processing facility opened in Ireland in 40 years.

Technological University of the South East – Waterford Chamber has long championed the provision of university education in Waterford so that the South East is no longer the only region of more than half a million people in these islands without a university. Equity alone demands that this deficiency be addressed before further generations of our most ambitious school-leavers are forced to leave the region in what is too often a one-way brain drain. Providing for the talent requirements of the future is critical to ensuring Waterford based business can compete effectively internationally.

Waterford Institute of Technology is an exemplary higher education institution with a track record in delivering quality education programmes across a diversity of levels and disciplines as well as a strong research base. However it can deliver even more for this city, region and country as a Technological University.

We encourage stakeholders to move forward with re-designation as a matter of urgency. Investment to underpin the Technological University is critical to ensure that the infrastructure and knowledge resource base of the Technological University of the South East is of a standard comparable to international comparators. As well as contributing directly to population growth, the Technological University will make Waterford a more attractive place to live and work as well as aiding the drive to attract further investment and back indigenous enterprise.

Enabling Waterford Institute of Technology/Technological University of the South East to foster a new generation of start-ups and to respond nimbly to skills requirements of the future will help position Waterford for further economic growth to 2040 and beyond.

Tourism – Considerable potential remains for Waterford to grow its tourism base by attracting more Irish and overseas visitors while also retaining those who do come here for longer. The consistent availability of passenger services between Waterford Airport and the UK/Europe is critical, especially for Waterford to get its share of the fast-growing market for short city breaks. Improved berthing facilities for cruise ships will help Waterford and the South East tap into the higher-spending visitor market.

Similarly, continued investment is needed in Waterford's artistic, cultural, retail, hospitality and festival offering along with improved marketing of the city to would-be visitors. Indeed, many of the things that make Waterford more attractive to visitors also help with the attraction of investors.

Urban Core – For Waterford to achieve its potential and act as a powerful driver for the South East, it must have a strong city centre. Recognising this, Waterford City & County Council has made great strides on improving the urban core but more can and should be done over time through a combination of public and private sector investment.

The more attractive and vibrant our city centre becomes, the better placed we will be to secure further investment and growth – helping create a virtuous circle and ensure we do not end up with doughnut development where the centre is neglected as the suburbs grow.

University Hospital Waterford – A growing and ageing population will only increase demand for healthcare provision and, notwithstanding advances in primary care, acute services will remain largely concentrated in our major hospitals.

To ensure that Waterford remains an attractive place to live and somewhere that people will consider favourably when relocating, it is vital that University Hospital Waterford continues to develop its range of services and specialties commensurate with serving a large regional hinterland. The hospital is a vital – arguably one of the most vital – piece of social infrastructure in the South East region but also a key economic driver and a source of valuable direct and indirect employment.

Any diminution in services must be resisted and the hospital's role enhanced.

Waterford Airport – The expansion of our regional airport is perhaps one of the clearest opportunities for growth.

A key priority here is the extension of the runway to 2,100 metres in length and 45m width. This will then be capable of accommodating typical passenger jets such as Boeing 737 and Airbus A320/321.

A 2016 economic impact analysis of the runway extension by AECOM shows that by 2035, the Airport could be handling up to 600,000 passengers per annum and serving 12-15 destinations in the UK and mainland Europe. Employment at the airport would then be in the order of 300-350 people but, more significantly, it will be helping to power wider economic activity in business and tourism.

Conclusion and Recommendations

Waterford Chamber welcomes the launch of the National Planning Framework and the opportunity to contribute to the development of Ireland as a country over the next 20 years, to 2040.

Our Vision

- By 2040, Waterford will be a city with a population of 100,000 people, driving economic growth and employment creation.
- Investment in connectivity has been delivered between Waterford, Cork, Limerick and Galway, enabling more effective trading and mobility corridors which will drive economic and population growth in Waterford, other regional cities and surrounding hinterlands.
- The recommendation of the Report by the Waterford Boundary Review Committee has been delivered in its totality.
- A vibrant city centre which includes the development of the North Quays.
- Waterford will be a University City with the Technological University of the South East being recognised as a teaching, research and innovation institute of international standing and providing our future generations with the skills and competencies required in an ever changing technological and global society.
- University Hospital Waterford designated and functioning as a regional hospital delivering the full range of hospital services for the region.
- The establishment of Waterford Regional Airport which connects the South East with the UK and Europe.
- Waterford is a developing City of international and indigenous enterprise connected regionally, nationally and internationally through a significantly improved road, rail, port and broadband infrastructure.

*Submitted by
Waterford Chamber
March 2017*