



Northern & Western
Regional Assembly

IRELAND 2040

NATIONAL PLANNING FRAMEWORK

Submission from the Northern and Western Regional Assembly



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Preface: Strategic Focus

David Minton, Director

Ireland faces a period of unprecedented change over the next decade and the way in which we respond to and manage that change will determine the future direction of this Island in economic and social terms for several generations.

In entrusting the strategic growth of our nation and economy on a spatially led instrument our policy makers need understand both our capacity and our capability. We need to help. Our approach to this submission in 'looking back' from 2028 and 2040 aims to illustrate the potential of our region. The future looks good.

The **National Planning Framework** (NPF), I believe, is our best route, as a nation, to respond to international trends. The NPF is a once in a generation opportunity to craft a vision for a ***Balanced, Effective and Inclusive Island***. If we are ambitious, brave and creative it can be the instrument to unleash the potential of our regions and to harness the energy and talents of all of our people to make that better Ireland to which we all aspire.

Context

All developing countries including Ireland are experiencing the global phenomenon of accelerating migration to urban areas. This phenomenon is largely outside the control of national governments or programmes and counteracting these trends with interventions to achieve 'balanced regional development' does not take cognisance of the wider agglomeration, economic aggregation, globalisation and the changing nature of work.

It is also self-evident that the continued and uncontrolled growth of the Greater Dublin Conglomerate is neither desirable nor sustainable into the future. In fact, continuation of the Business as Usual model as outlined

in the Issues & Choices Paper will put the efficiency of Dublin, our main economic engine, and the future prosperity of the entire Island at considerable risk.

The challenge is complex and multi-faceted. We must maintain the competitiveness of the Greater Dublin Conglomerate while directing future growth to the other regions. We must also identify the potential for economic development in each region and enable that development by prioritising investment into the lagging regions which have most to contribute to our overall National progression in relative terms.

Most importantly we need to be 'responsive' and 'adaptive' – Planning, Land Planning, Infrastructure, Housing, Services, Sustainability and Institutional Reform. Difficult strategic and political decisions will need to be taken informed by measured and evaluated spatial and economic solutions.

Response

Embracing 'Effective Regional Development' (people & place) will fasten our responsiveness and adaptability. Key to this will be reform of institutions and include legislative & policy change. However, 'effective regional

development’ requires an increased role for multi-level governance as a way of funding new and innovative regional solutions. Regional in proposition but local in effect.

Underpinning this move to ‘effective regional development’ will need to be a clear legislative commitment and recognition that:

- Our regions have significant latent economic potential that can be unleashed through investment in both infrastructure and people.
- Regions, functional areas and local stakeholders are best placed to respond with effective programmes.
- Our cities, particularly our successful Capital city is increasingly struggling to cope with infrastructure needs and Government need to favour investment in alternative city regions.
- Optimising new forms of investment need to be devolved to encourage modern financial instruments to deliver funding for INNOVATION, INVESTMENT AND INFRASTRUCTURE.
- Achieving the objectives of the NPF will require a 25 year national infrastructure plan (water, roads, rail, utilities, broadband etc) aligned with the strategic objectives.

It is clear that this region has lagged behind the rest of the Island in terms of population growth and economic activity. The lagging is a significant loss to the Island as a whole and is not due to any inherent flaw in the region which is already home to some of the largest global corporations on the planet. The region has also now garnered a reputation for resilience through an exponential growth in indigenous enterprise and entrepreneurship levels. It is in the main due to delayed investment in critical communication and transportation infrastructure, most notably the motorway network.

The Assembly has identified the three City Regions of Galway, Sligo and Letterkenny-Derry/ Strabane as critical development areas for future population growth underpinned by a sustainable environment and economy, supported through a network of significant towns, villages and rural catchments. In addition, the Assembly support the continued development of Athlone as a service and employment centre, acting as a driver for the surrounding towns and it’s catchment, which includes the regional town of Roscommon. It also looks to underpin the growth of the two towns of Cavan and Monaghan, building on their cross border and city links to Belfast, Dublin and to the eastern corridor that links them

This submission captures 5 clear messages for the future of the Northern and Western Region.

1. Spatial prioritisation of the city regions and regional towns as economic drivers.
2. Market, industry and spatial impact of the 4th Industrial Revolution on settlement types.
3. Unlocking latent economic potential.
4. Critically enabling infrastructure.
5. Convergence through good governance and connectivity (multi-level governance).

This region aims to lead Ireland into 2040 by advocating and endorsing policies that encourage suitable responsiveness and adaptability. I believe in the capability of this ‘Place’ and resilience of our ‘People’, we just need to unleash its potential.

David Minton
Director

Executive Summary

1. The following submission on the Issues and Choices Paper for the Preparation of the National Planning Framework: Ireland 2040 is presented by the Northern and Western Regional Assembly, following collaboration with key stakeholders, including local authorities and representatives of the State Development Agencies and 3rd level education sector.

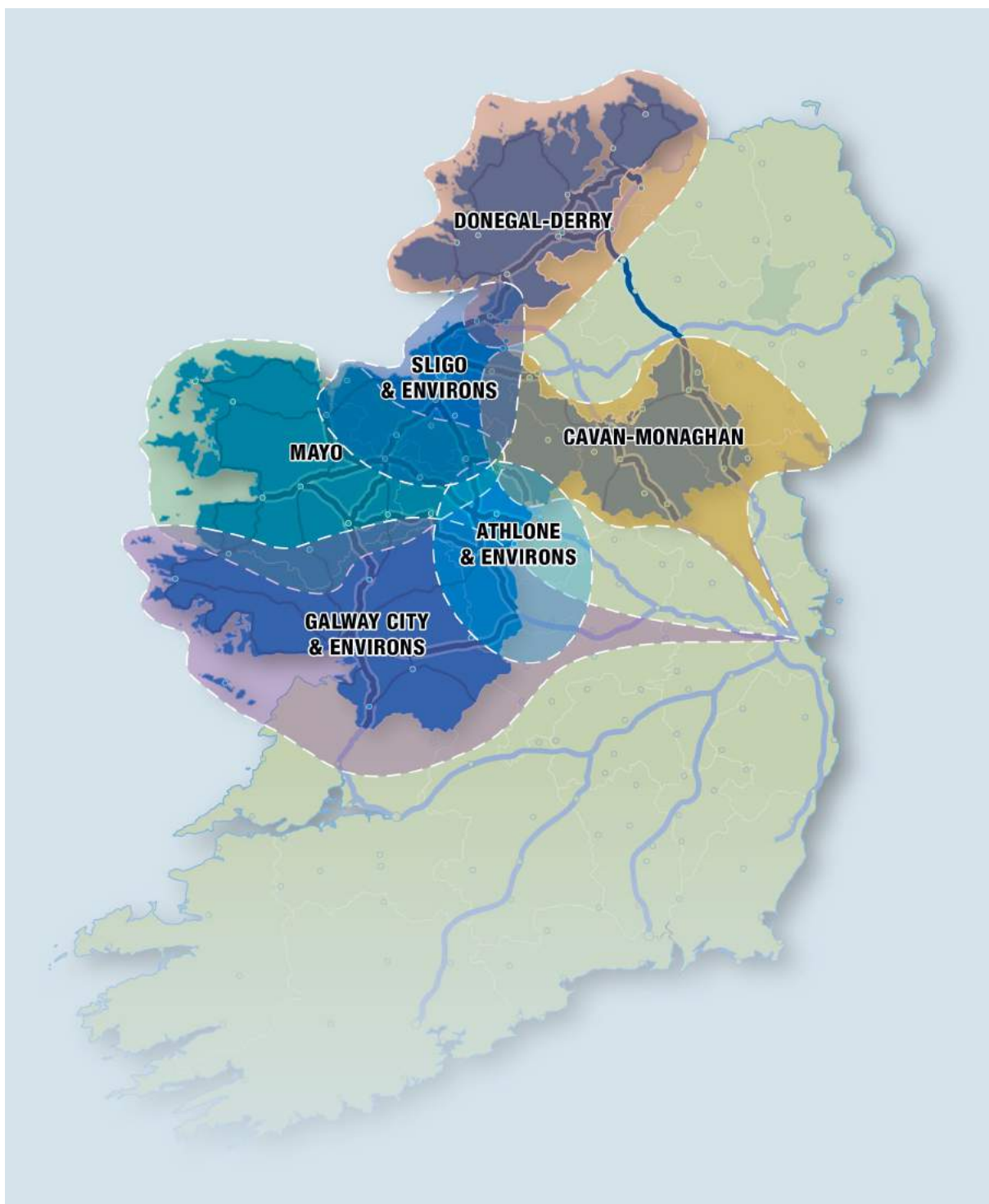
2. The Assembly highlights in the Submission the potential of the Region to underpin island wide sustainable growth to 2040, including in Energy, Marine, Life Sciences, Financial Services, Creative Economy, Tourism and Agri-Food.

3. The Assembly acknowledge and welcome the overall proposal to focus on building up the urban fabric of the State whilst also seeking to underpin the future of rural Ireland. This means for the region a focus in the forthcoming NPF on building up urban catchments to be of sufficient scale to underpin the region as a whole in economic, social, cultural and environmental matters, whilst embracing the populated living countryside that is a characteristic of this region's culture.

4. The Assembly has identified the three City Regions of Galway, Sligo and Letterkenny-Derry/Strabane as critical development areas for future population growth underpinned by a sustainable environment and economy, supported through a network of significant towns, villages and rural catchments. In addition, the Assembly support the continued development of Athlone as a service and employment centre, acting as a driver for the surrounding towns and it's catchment, which includes the regional town of Roscommon. It also looks to underpin the growth of the two towns of Cavan and Monaghan, building on their cross border and city links to Belfast, Dublin and to the eastern corridor that links them.

5. The NWRA ask that the NPF clearly delineates these areas in the policy framework itself and, more significantly, their on-going development is underpinned across polices of all departments and state agencies:

6. The Assembly demonstrate the critical need to underpin the long term development of the Region through the provision of key infrastructure including upgrading the N4 (and N5 from Westport to N17), the N2/A5, the Galway City Ring Road and the N17/N15 Atlantic Corridor network. The long-term feasibility of extension of existing rail services from Galway up to Sligo must remain an open option subject to appropriate consideration. This also applies to the movement of rail freight across the region and island generally. Therefore retaining existing and under used networks in public ownership must remain a policy priority for the long term.



Map 1: The NWRA Sub Regional Catchments.

7. The Assembly highlight the potential impact of the 4th industrial revolution, noting that this will bring considerable opportunity if the region is properly positioned through ensuring comprehensive connectivity across the region.

 8. The institutional arrangements necessary to deliver effective regional development are largely in place at local and regional level. What is now required is a clear focus at national level on implementation of the investment programmes, noted throughout this submission, but also, and as significantly, policy which applies a pro-active discrimination in favour of lesser developed areas.

 9. Spatial concerns arising from BREXIT bring considerable challenges but also huge opportunity. The Region is likely to be the best positioned to sustain a spatial relationship with all of Northern Ireland in social, cultural, environmental and economic matters and therefore needs to be at the heart of engagement on spatial planning grounds with counterparts in Northern Ireland.

 10. A cross departmental approach to ensuring implementation of the NPF is a welcome approach which could be further developed through creation of a cross departmental group focused on the cross policy application/whole of government application of policy focused on effective regional development in each Regional Assembly Area. Such a structure could be serviced by the Regional Assembly.

 11. The creation of a futures focused expert group which would provide the necessary intelligence and knowledge of transition based processes in the wider international context has to be a necessary initiative if futures thinking is to adequately inform the monitoring and evaluation of an NPF and underpinning Regional Spatial and Economic Strategy.

 12. The creation of a Connacht-Ulster Technological University alongside the continued expansion of Galway University, and underpinned by the wider education sector, will be vital if the Region is to retain younger people and position the Region to have sustainable growth. It follows that any failure to develop a Technological University of the highest international standard would be a major impediment to future development of the state and would seriously compromise the future living conditions and opportunities for the people of the West/North West.
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1.1 Backdrop to Submission

Development of a vision for the Northern and Western Region is at the heart of the work of the Northern and Western Regional Assembly. The Assembly aims to achieve this through putting forward the proposition that Rural Ireland is far from dead. The Assembly has a vision which is alert to international trends whilst interpreting our unique heritage. In fact the Assembly is changing, adapting, and reshaping to confront the challenges of the international arena and build upon the many strengths inherent in the Region. The Northern and Western Region has a legacy of underinvestment in critical enabling infrastructure and it is noteworthy that the emerging data from Census 2016 indicates that parts of the Region have suffered population decline or low levels of population growth and an increased ageing population. Notwithstanding this, the region, as the most rural of Irish Regions, has shown considerable resilience. The region has not just survived but is now critical to the overall development of the State, especially in the vibrant start up culture of its entrepreneurs, the diversity of its villages and towns, the environmental wealth of a diverse and internationally important landscape and, most importantly, the culture and diversity of its people. Amongst this, in Galway, it has one of the fastest growing cities in Europe, a hot bed for medical technology, a model of city-led regional development and a city region with the foremost potential to lead Ireland into 2040.

This background, which will be further developed in the remaining sections to this submission, has provided an evidential basis for the Assembly to develop our vision of having a connected region capable of competing within the context of the 4th industrial revolution, but doing so with a quality of life that is at the heart of our region's future.

1.1.1 Critical Milestones

This submission starts with how the Region will have moved from the current context to where it will be in 2028 and 2040. The Assembly has identified 2028 as a critical milestone in delivering the infrastructure necessary to underpin the future of the region. It is the view of the Assembly that the first critical phase to a successful National Planning Framework is to have in place both the institutional settings and the necessary infrastructure to deliver a successful connected region over the life span of the NPF and within the environment of transition now accepted as the 4th industrial revolution.

The institutional setting is almost already in place through the re-configuration of the planning system at local authority level and the proposed statutory underpinning of the NPF. The establishment of the Regional Assembly is creating the policy space to take a region-wide perspective across traditional boundaries. In preparing the Regional Spatial and Economic Strategy, the Assembly will further develop the detailed policy response to meeting the challenges of transition that are the hallmark of the 4th industrial revolution.

The 4th Industrial Revolution

The world is now in a historically important period of industrialisation, what is now accepted by the World Economic Forum as the 4th industrial revolution. New options for growth are focusing on artificial intelligence, robotics and the interface between the two, a critical aspect of new public service delivery platforms increasingly featuring across the globe. The on-going development of biotechnologies, principally in genetic engineering and neurotechnologies and their interface present new economic opportunities but will bring considerable disruption to existing services and goods impacted by such developments. The internet of things and the advancing of 3D Printing is also causing considerable disruption to existing industrial and service sectors. New skills are, and will be, required with the major focus now on development of people to understand and develop data literacy. Done correctly, an economy and society will see considerable benefit in terms of well-being and wealth, done badly and a region/state risks falling down the well-being and competitiveness stakes with resulting deterioration of quality of life and incomes. These skills include the capacity to solve complex problems, people management, human factors and the interface with technology, sustaining quality services that are people centered, creativity and active listening, among others. Regions which can build these skills platforms will underpin their sustainable development and quality of life. Regions which do not will see their development potential lag severely within a 4th Industrial revolution context. In other words those who can successfully manage the convergence of digital society and biotechnological advances with the physical characteristics of the area are most likely to succeed within the 4th industrial revolution.

The need to invest in necessary infrastructure is highlighted throughout this submission. In the absence of a fit for purpose infrastructure, the potential of the Region to sustain and enhance its impact upon the state's future will be restricted and the opportunities that come with the transition to a new industrial era environment lessened, not just for the region which holds considerable competitive advantage in the context of the transition era, but the State as a whole which is going to have to confront the reality that other regions have less capacity to grow in the on-coming environment unless the capacities of the Northern and Western Region are fully utilised.

1.2 Consultation

Notwithstanding the short period available to the Assembly, comprehensive consultation was undertaken in the preparation of this Submission. In addition to the members of the Assembly, the Local Authority Chief Executives collectively were engaged to develop a regional overview of local authority issues. In addition, a workshop was organised with participants drawn from the Directors for Planning and Economic Development in each Local Authority, Chief Officers of the Local Enterprise Offices, and representatives of the State Development Agencies, the Third Level Sectors and other contributors. Specific workshops for individual Local Authorities and Local Community interests

were also organised across the Region. Annex A to this Submission lists those bodies that have actively contributed to and collaborated in the development of this submission

1.3 Setting of principles

The Regional Assembly has set out a number of underlying principles which should inform the development of the National Planning Framework and the consequential Regional Spatial and Economic Strategy. These principles are as the result of the workshop involving key voices in the Region.

These principles are as follows:

- i. Our region is a 'region without borders or boundaries', it is based on catchments and clusters.
- ii. The general principle in the Issues Paper regarding the focus on the term "Effective Regional Development" is welcomed by the Assembly and must be retained. The NPF could recommend a policy on a cross departmental approach to effective regional development through Regional Assembly structures.
- iii. A strategic objective of Government should be to incentivise and encourage convergence amongst industry, education and emerging sectors for bespoke regional responses (Regional Governance)
- iv. The NPF has to recognise unique spatial catchments and the potential of traditional and emerging economic sectors to contribute to overall national GDP.
- v. The NPF has to recognise our regional value propositions and invest in our necessary and critical enabling infrastructure.
- vi. Functionality of the region is recognised as not just being internal but also external on the island with the other regions and Northern Ireland and, critically, internationally (e.g. where we trade and travel now and in the future)
- vii. The NPF should recognise the USPs in this region, harnessing it's environmental and heritage assets.

1.4 "Effective Regional Development" means "Effective Discrimination"

The Regional Assembly position is that the NPF must provide for effective regional development for this region. It must be understood that the regional policy context, is not a fixed environment with clearly defined mandates and responsibilities for the public bodies charged with delivering the National Planning Framework and the Regional Spatial and Economic Strategy. The simple reality is that such is the progress of economies across the globe, along with the competitiveness factors which underpin such growth, that regions can no longer operate on the basis of either top down direction from central government or indeed bottom up initiative alone. All levels of government must partner with both the private sector and social partners to form a central platform to confront the challenges of the oncoming environment. Having in place the procedures, institutions and resources to underpin responses to transition from industrialised societies into post-modern communities are now an increasing feature of how government is organised in the most successful, sustainable societies across the globe.

The NPF must incorporate learning from regions, even traditionally peripheral regions such as North Holland, Norway, West Sweden and West Finland, that have bridged developmental gaps and confronted the ever diversifying world economy. They do so having a comprehensive understanding of the

Funding for Effective Regional Development-Lessons from Scotland

The first City Deal was agreed for an area of Scotland – Glasgow and the Clyde Valley (later re-named the Glasgow City Region) in 2014 following their successful role out across England..

Glasgow City Region deal has, at its heart, a £1.13 billion Infrastructure Fund that is being used to take forward 20 infrastructure projects across the city region. The projects selected are the ones that will make the greatest economic impact for the local, Scottish and UK economies. One example of these projects is investment in site remediation and transport improvements to the M8 motorway to unlock 800 hectares of new employment sites on the Clyde Waterfront and the West End innovation quarter. Another example is a rail link from Glasgow Airport to Glasgow City Centre.

The Glasgow deal which may be replicated across the Scottish deals now is supervised at regional level with a Cabinet consisting of the political leaders of the eight councils (urban and rural) in the area, with each member having an equal vote. A Programme Management Office based within Glasgow City Council works with the partner Authorities to ensure delivery. The template might be a possible example in Ireland for such initiatives with the Regional Assemblies providing the institutional setting within which such initiatives take place.

dynamics of change associated with societal disruption, economic displacement and where there is a place for both active citizenship and individualism. This has allowed them to take advantage of their peripherality and first mover initiatives which now underpin some of Europe's most successful regions. They have only been able to do so though having bespoke policies targeted at their regions and with the full policy based support of the State and central government. This has meant that such governments discriminate against better developed and more self sustaining regions in favour of those targeted for greater growth in order to bridge the gaps between those with potential but lesser development and those with the capacity to grow in a newly re-configured economic environment. The primary reason for such an approach is that in terms of overall development of states such as the Netherlands, Sweden and Finland is the realisation that more developed regions do not necessarily have the capacity to grow as quickly as those regions which have such capacity. Therefore,

the capacity of the State as a whole to grow is heavily influenced by creating regional growth in under developed regions with the platform to benefit from the new industrial revolution.

In the case of Ireland's regions, whilst they perform generally above average by comparison with many other parts of Europe, they are not among the most competitive regions and do not reach the level of well being which might reasonably be expected in a country the size of Ireland with its relatively advanced education and skills. What is needed in the NPF is an understanding of how Ireland's regions can become the platform for advanced but sustainable development. Equally however, in importance, will be the putting into place of effective institutional arrangements at a regional and local level to ensure that local and regional policy is fully integrated and iterative between local, regional and national level.

The Northern and Western Region 2028 and 2040: Reflection on the compelling success in effective regional development

2.1 Our Expectations for the Region in 2028 and 2040: Looking back from 2040

Our vision for the Northern and Western Region is that in 2028 and 2040 the Assembly will be able to reflect on how the region moved from being one that had long lagged behind the broad socio-economic performance of the rest of the Island of Ireland to being at the core of the Irish economy in 2028 and, ultimately, 2040. Critical to moving from a long standing below par performance will be the investment driven policy of the national exchequer, alongside private investment, in the infrastructure necessary to harness the latent potential of the region and to enable the region to lead Ireland's transformation through the influences of the 4th industrial revolution.

So by 2028, and thereafter, the Region will be characterised by:

Prioritised Investment: Building upon the then capacity of the Region in 2018, the State, as provided for in the Ireland 2040 National Planning Framework, and underpinned by a pro-active Regional Assembly and supporting local authorities, began to prioritise investment in developing existing catchments in the region and identified new catchments which became the centres for the now vibrant industrial and services core for both the Irish and European economy.

This progress in turn has been a vital component in the Region becoming one of the leading investment centred regions of the European Union, playing a leading role through

the Technological University of Connacht Ulster and National University of Ireland Galway. Both universities boast local, regional and international campuses making extensive use of online learning.

Quality of Life and sustainable development:

The population experienced considerable growth by 2028 while in-migration of skilled people from across the Globe has buttressed skills needs in the Region. Much of the attraction of those skills has been based on the Region's outstanding quality of life. This has been achieved through promotion and nurturing of the regions high quality natural, built environment, social and cultural assets and the creation of innovative, smart, inclusive living environments for our ageing society that has resulted in age-inclusive built environments with technology supported living arrangements that is keeping our older and vulnerable people in the region out of institutionalised care for longer.

Competitive advantage: Also noteworthy is the competitive advantage of the region across a range of production options, including tourism, energy, engineering, food, advanced manufacturing and marine. The development of the Region as a key European source for carbon neutral energy production has allowed the development over the past ten years of many carbon neutral towns and villages and communities which are hyper-linked into world events and technological development. The initiative to advance into a carbon neutral society came on foot of initiatives taken through the Regional Assembly in the period 2018-2028. These initiatives were a key aspect of the National Planning Framework in 2017. This Assembly led initiatives allowed for a

re-focusing on a broad spectrum of energy production, including marine production, as the central platform for renewable energy and allowed for a move away from having an almost complete focus on wind based production.

Connectivity: Considerable progress has also been made in building up the regions infrastructure which has allowed development of a region wide identity in connectiveness and capacity for further development and socio-economic growth. The region has therefore, in the ten years since the adoption of the National Planning Framework 2040, become a leading example in the world of effective regional development, providing an exemplar for other largely rural regions in the EU and worldwide. Further key catalysts were:

- i. the continued expansion of Ireland West Airport Knock
- ii. upgrade of the road network from Dublin to Letterkenny-Derry,
- iii. upgrade of the N4 and the N5 from Westport to the N17
- iv. Upgrade of the N17/ N15 (Galway – Sligo – Letterkenny) as part of the Atlantic Economic Corridor.
- v. The installation and utilisation of region wide broadband
- vi. The regeneration of the Ulster Canal From County Cavan to Lough Neagh, Northern Ireland, as an extension of the Upper Shannon Erne waterway and potential to develop linkages to Atlantic Ocean via Ballyshannon, County Donegal.

Furthermore, public and private investment and a focused Government approach to supporting international business and overseas visitors through the region has ensured the Airports, principally Ireland West Airport Knock, Shannon Airport, Donegal Airport and City of Derry, have become a key driver to the overall development of the Region. Donegal Airport and Sligo Airports have continued to provide important local services including air based servicing of the vibrant off shore renewable energy sector.

None of this progress therefore happened by accident but through planning for the transition of the region, ageing of the region's population and the embedding into both national and European policy of targeted interventions in investment, community capacity and economic convergence on a scale never previously attempted in Ireland. Evidence at this point suggests that the region built upon its competitive advantage due to the positive impact of technology, notably the investment in broadband between 2018 and 2020 which provided the basis for regional connectivity and hyper linkage, essential components in the modern economy of 2028 and now equally critical as we move towards 2040.

As a result it is anticipated that in the period 2028 to 2040, the continuing role of the region in the general well-being of Ireland including, finally, the achievement of energy independence, full carbon neutrality and a population diversity that consists of communities where social disadvantage will largely be a thing of the past, is becoming an achievable goal.

2.2 The Likely Demographics, Settlement Catchments and Infrastructure

The vision in 2017 was such that in 2028 and 2040 we can reflect on the regions transition from the socio-economic context of the 3rd industrial revolution into and indeed now post 4th revolution. The Assembly has retained a continuous focus on building connectivity across the Region and out of the region into the other regions of Europe. Perhaps even more critical was the realisation at the time that the region had to address development in the context of the changing catchments within which it exists internationally. This was particularly important in regard to the impact of BREXIT and the then exposure of its indigenous industry to the changing British Market. The monitoring of the shifting patterns of investment arising from BREXIT was to result in the NPF having clear

indicators of these changes which allowed for timely interventions at both regional and national level to the BREXIT process.

In broad terms the Regional Spatial and Economic Strategy applied the following parameters based upon the strategic direction of the NPF.

Linear City: The adoption of an effective regional policy by the Irish Government in 2017 brought with it a bias towards developing urban catchments to grow the population of the country within greater urban density and more coherent catchments. This allowed the region to expand population in the 10 subsequent years, supporting the growth of the city region of Galway, the cross border Letterkenny-Derry/Strabane City region and the growing of the smaller city of Sligo. The cities and towns that make up the hub of the Atlantic Economic Corridor including Limerick, Ennis, Gort, Galway, Tuam, Castlebar, Ballina, Sligo, and Letterkenny provided the necessary platform on which to apply a linear city concept. The concept of the 'Linear City' grew incrementally over the 20 year period with the principal towns between Limerick City and Derry bolstered by more effective planning policies and increased population and employment. The Task Force for the Atlantic Economic Corridor was a key driver in the ultimate delivery of this proposition for effective regional development.

Equally, the continued development of Letterkenny-Derry/Strabane City region, which followed, it is worth noting, similar cross border cities such as Strasbourg-Kiel in France-Germany, Malmo in Denmark-Sweden and Innsbruck in Bavaria-Austria played a key role in mitigation of the impact of Brexit and the subsequent re-orientation of the Border counties and the Northern Ireland economy.

Road Infrastructure: Following the lead from the NPF, the completion by 2028 of seven critical region wide projects was essential to achieving the level of development now seen across the northern and western region. These were:

- The North West link: The upgrade of the N2 / A5 / N14 to a Ten-T 'High Quality road' standard from the North West City Region (NWCRC) to Monaghan and on to Dublin, facilitating seamless border crossing's at Emyvale, Lifford, and Derry, arising from the implementation of Brexit.
- The improvement of the N4, to a Ten-T 'High Quality road' standard, serving Sligo City Region from Mullingar – Longford – Carrick on Shannon, by passing all towns including Newtownforbes and Edgesworthtown.
- The development of the Atlantic Economic Corridor from Galway to Derry, to a Ten-T 'High Quality road' standard, (as committed to by the Irish State under the EU 'TenT' project to 2050), which will ensure improved access to the City Regions, but also to Ireland West International Airport, and Killybegs Port.
- The Completion of the N6, Galway City Ring Road to a Ten-T 'High Quality road' standard, as well as the implementation of the Galway Transport Strategy, whilst currently primarily bus based, recent efforts to examine the potential of high density public transport provision using robotic and driverless vehicles suggest that this form of public transport is now a realistic option, particularly given the city now has what would be considered a European density scale.
- The improvement of the N3 as a non Ten-T connector route, to a Ten-T 'High Quality road' standard (or equivalent) from the M3 to Cavan, including completion of the N3 Virginia by-pass in South Cavan, lessening journey times from the entire Fermanagh, Cavan / Monaghan region to the M50, Dublin Airport and Greater Dublin Area and thus, enabling towns such as Virginia and

Ballyjamesduff to expand significantly and further underscoring Cavan Town itself as a Regionally significant economic driver in the Central Border area.

- The completion of the N5 upgrade to a Ten-T 'High Quality road' standard from Westport across to the N17.
- Studies to address the development of an inter-urban express route from Sligo to Dundalk and from Roscommon to Athlone were also advanced to a point where a decision to advance construction can be taken.

Airports: The economic and planning strategies pursued by the Regional Assembly captured the economic potential presented by those airports internal to the region (Ireland West International Airport, Sligo and Donegal Airport and the islands) and also those external to our region but within its catchments (Derry Airport, Dublin Airport and Shannon Airport).

Regular transatlantic flights are becoming the norm in both the Ireland West International Airport and the City of Derry Airport, with the advent of independent airline operations from both airports, as well as the expansion of a full range of services into mainland Europe and the UK. Flights into the Far East and Africa are available from Dublin and Shannon.

Ports: A new and exciting key development has been the decision to examine the feasibility of developing a Tier 1 port facility on a site along the north west coast as a critical feature in providing the longer term trade capacity for movement of freight out of the Region and the island generally as Dublin, Cork and Shannon/Foynes reach capacity.

Both Galway and Killybegs Ports have become the jewels in the crown in the northern European Cruise Markets with a continuous flow of adventure based and general tourism cruise offerings. Both ports also provide for marinas, whilst Galway provides berthing facilities for general cargo vessels, oil tankers, passenger vessels, fishing vessels and container vessels.

Killybegs Port continues to be Ireland's Premier fishing centre and it also provides an important role in servicing the marine sector including the offshore oil and gas industry and the renewable energy industry. The long-held ambition to develop Killybegs as a Regionally Significant Marine Resources hub and as an Innovation Centre for Marine Resources including Food, Tourism and Low Carbon has been realised since 2028 through convergence amongst industry, education and local government sectors. The expansion of the Naval Service to include a bespoke port facility in the North West has also been an important factor in sustaining both public service numbers and services in the region whilst also enhancing the defense of what is now Ireland's most valuable natural resource, the Atlantic Ocean.

Energy: Critically, and arguably the most important development in the 2020s, was the expansion of the energy transmission networks including electricity and, in the short term, gas up to 2030. Decisions made in consultation with Eirgrid and outlined in 'Planning our Energy Future (2017)' was essential. The ready availability of a consistent, quality energy supply was fundamental to development of 4th generation industry and public services. It was also a central aspect in freeing up housing capacity in the cities and towns of the Region. One of the greatest benefits, of course, has been the transition over the past twenty years away from fossil fuel based transport into renewable energy based transport. In addition to now using a largely indigenous renewable fuel source and thus retaining income in the region, the existence of a carbon neutral motor fleet across the region has underpinned the environmental sustainability of the region and allowed smaller towns and villages become totally neutral, thus underpinning their longer term development. This clean and resilient energy supply, combined with improvements to broadband, has enabled the expansion of the Data Industry in the region. The Region has also become a net energy producer enabling the rest of the Country become more energy independent.

Water/Wastewater: Completion of the Irish Water Investment Programme in the region by 2025 continues to benefit the region with high quality water and further capacity for growth while generally the treatment of waste water more than meets EU and WHO requirements. Consideration is now being given for the export of clean and treated water to the UK market.

Health: The advances in healthcare technologies over the past two decades have reduced pressures on the general hospitals across the region. Nonetheless, with the ageing population came ongoing healthcare challenges and opportunities that enabled the move towards person centred bespoke health care provision which meant radical re-configuration of services through, initially, the primary care network but also within the increasingly re-configured hospital network of the 2020s. This did mean a fundamental review of the role of local services through which enhanced health care have now become the norm, with significant regional growth in employment within this sector.

All of the above could only have been put in place in a timely fashion with the Assembly and the Government having the foresight to think strategically in 2018-2020. Building upon connectivity across and within the region was central to the now successful region that is the Northern and Western Region of Ireland, one of the most successful regions in the OECD. For this strategic thinking through the NPF in 2017, the Region and Ireland has managed the transition out of a 3rd industrial revolution environment into being at the forefront of the 4th revolution.

Education: The Education Sector played a critical role underpinning the migration of the region into an advanced, innovative society and economy. The move towards the technological region came about with the establishment of the Connacht Ulster Technological University and the on-going expansion of Galway University in the 2020s. The successful implementation of transition through the Sector ranged from primary school up. Bespoke programmes for

the education of the population, and training to transition inward business start-ups, up-skilling the workforce, creating the next generation of entrepreneurs, as well as the basic three Rs and research for the next generation of new products and processes all became a feature of the new approach to region wide education and training. The Education and Training Boards played a crucial role in the overall effort across the region in partnership with the Regional Assembly and the 3rd/4th level providers. The Region continues to value the importance of a pro-active approach to education and training transition to equip it to generate further improvement. This continues to be an integral part of the development of the region. Further Education also plays a critical role alongside the Enterprise Role of the Local Authorities which facilitate bespoke programmes on entrepreneurship and business development etc.

Education now has truly become an export product with fee income from students around the world supporting the on-going provision of training and education in the Region.

2.3 The Key Economic Sectors Underpinning The Region, and The Impact of the 4th Industrial Revolution

The Region in 2018, as the NPF commenced, was reasonably endowed with comparative advantages which were to become critical as highlighted earlier, to the overall capacity of the State to take advantage of the positive impacts of the 4th industrial revolution and to mitigate against the negative impacts of change coming from advanced robotics, artificial intelligence (AI) and, of course most critically, the impact in the 2020s of the interface between robotics, AI, argumentative reality and virtual reality.

This was to have a number of immediate impacts on the region. In the first case, thanks to the investment in broadband and renewable

energy alongside the generally stable socio-political conditions in the region, it was able to provide an attractive offering to international investors seeking to develop disruptive technologies as well as have a high quality of life. The Region became a centre for developing demonstration actions in areas such as self-driving, augmentative reality applications and tarmac technologies. This was in part supported by the development of the Connacht Ulster Technology University (CUTU).

In addition, the latent capacity for renewable energy in the region finally became a real and important aspect of the local economy with the Marine Wave Centre a precursor to advancing national research efforts under the leadership of the Marine Institute, thus re-enforcing international perceptions that investment in this increasingly carbon neutral economy society was to be a central feature of the business planning for disrupters, a central aspect of the 4th industrial revolution.

A further important initiative by the Assembly and Local Authorities, again with the support of CUTU and Galway University, was the initiation of a series of local initiatives to develop carbon neutral towns and villages as an aligned policy to the re-vitalization of the regions villages which had suffered considerable depopulation in the early part of the century.

By 2028 the key sectors that now form the regional economy were well developed, having been derived from a focus between 2018 and 2025 on the then emerging sectors of the 4th industrial revolution period.

These include:

- The re-configured public sector which is now focused on delivery of bespoke support services for the individual citizen (including protection of data), security including defence due to the need to protect Ireland's main territories and source of much of its energy, person centred life cycle health care and education and training
- Media including independent news providers and fact finders, which successfully grew out of the expanding media/entertainment sector of the early 2020s and which is now supplying the expanding demands for multi-language based news/entertainment platforms, principally in Asia
- Tourism based upon experiences and cultures which developed from the already well established sector of the early 21st century. Principal products in the region now include the real food clusters which have created a niche recognition internationally as a response to 3D printed foods now generally available in most other mass tourism centres across the globe and experiential tourism based upon the high quality environment, both marine and land-based across the full extent of the region
- Sustainable Fisheries which has been critical to the re-configuration of the fishing sector where the region is now one of Europe's leading production areas for seaweeds, fresh and marine water species and shellfish.
- Marine based sustainable energy production which has moved the region to becoming a world recognised region for production of off shore renewable energy, including tidal and storage resourced energy production
- Life Sciences which grew out of the burgeoning sector of the early part of the century and underpinned by the research capabilities of both Galway University and Connacht Ulster Technological University
- Bespoke medical devices which developed from the already highly developed medical device sector which developed from initial mass production based manufacturing to person centred design devices reflecting the general move towards devices now focused on the personal physiology of patients, one of the major breakthrough sectors of recent years

- Low volume quality sustainable food production which has been critical to the State maintaining its competitive advantages in quality food production, particularly given the world wide demand for such food against the backdrop of continued low cost, mass produced foods from South America, Britain and parts of Asia
- International services including AR/VR Management, Individual Financial Management and Protection which has been one of the most rapidly expanding sectors of the past two decades and remains the key growth platform for new technologies in Ireland, Germany, the United States and Israel. The successful migration of the region into this sector was critical to sustaining and building upon the growing research capacity in the region in the later 2010s through to 2025
- Bespoke and 3D printing based engineering design and delivery which has provided the local indigenous sector with the capacity to use digital fabrication technologies to compete against the international sectors in these areas allowing for a long standing barrier to competitiveness to be overcome thanks to the now capacity to 3D print most structures and machinery

As noted above, the advance of the region in the above areas came through strategic policy decisions including, in the case of the public services, the reforms of the early 2020s in regard to automation and robotics along with the general re-configuration of the services towards person centred services as set out in the initial Reform of Public Services Plan of 2017.

Initiatives, addressing the emerging sectors of the 2010s in the region, taken up by both the private and public sectors were critical to overall industrial change and with the increased matching of skills from the 2nd, 3rd and 4th level education and training sectors. This allowed for a continuous flow of new graduates and skilled operatives along with, crucially,

re-training of skilled staffs in existing sectors in the 2020s. As a result and due to the foresight of the policy makers at regional and national level, the region managed a transition period out of the 3rd industrial era into the 4th far better than many regions which failed to foresee the industrial re-configurations of the early 2020s. The now extensive use of computational design, additive manufacturing, materials engineering, and synthetic biology which became the normal means of advanced manufacturing in the early 2020s has been the platform on which the region was finally able to overcome the historical barriers of peripherality that had long blocked the regions potential.

2.4 Pre-4th Industrial Era Employment in The Region

As noted above the region was one of the better placed regions in Europe given the foresight of the regional and national policy processes to build upon the competitive and comparative advantages of the region arising from the lessening of importance of location due to the then advances in the digital economy etc. Notwithstanding this transition, much of the then economy was severely challenged in order to enable its transition into the new economy. Agriculture and construction has gone on to benefit from the new economy, particularly in regard to the application of robotics. The thinking reflected in the NPF at the time was critical to a re-orientation of national policy on job creation in traditional sectors between 2018 and 2020. The decision of the Department of Jobs, Enterprise and Innovation to address this in the 2017 Action Plan for Jobs was to prove a major influence in the re-configuration of employment out of the traditional sectors and to a re-focusing of employment policy to support, through retaining and active work force planning, the necessary migration away from traditional employment roles in agriculture and construction in particular but also in retail and tourism.

This allowed the State in general to orientate towards automation substitutes for labour across the entire economy. As highlighted at the time, by the World Economic Forum and underpinned by a statement by the then Taoiseach at the launch of the process leading to the NPF, the net displacement of workers might have exacerbated the gap between returns to capital and returns to labour had the employment policy of the State at the time not recognised that the traditional and sheltered sectors of the state had to be addressed. The leadership shown made it possible for the migration of workers through technology into new skills areas in the region.

This has resulted in a net increase in safe and rewarding jobs in the previously traditional sectors in the following skills areas:

- Complex Problem Solving in both public and private sectors
- Critical thinking in both public and private sectors
- Creativity which advanced development of the creative/cultural sectors and media and entertainment
- People Management particularly with the move to active work force planning in the Irish public service
- People and services co-ordination as bespoke health care provision became a central feature of managing the ageing population
- Emotional intelligence which is now accepted as a central skill in addressing person centred service delivery
- Judgement and Decision making in the context of the complex decision making now required in both the public and private sectors
- Service orientation, particularly as traditional service areas were transformed to meet experiential led services in tourism, retail and financial management market demands
- Negotiation capacity and competence across public centred services in both the public and private sectors
- Cognitive Flexibility as the need to manage the human factor interface with robotics

As a result, traditional sectors such as agriculture and retail were enabled to transition over the 2020s into the more competitive environment in which both now compete, while the public service, traditionally sheltered historically, is now one of the most transparent public services on the globe and in the regional context playing a leading role in the on-going migration of communities across the region into vibrant and sustainable places to live.

3.1 Profile of a Region

The population of the NWRA (NUTSIII) region rose by 1.14%¹ to 846,862. The Northern and Western Region is essentially comprised of 6 different sub-regions; these sub-regions are based not only upon physical geography, but by other socio-economic factors, such as access to county / local services in healthcare, education, and retail. They are also shaped by travel to work patterns, and the ability of certain major urban centres within the region to extend their influence into wider hinterlands. The Regional Cities are supported by a number of key County Towns such as Castlebar, Ballina, Roscommon Town, Cavan Town, Monaghan Town, Carrick-on-Shannon and Athlone and they provide essential services and growth poles outside of the immediate catchments of the Regional Cities and the NPF needs to acknowledge the important role that these Regional Towns play.

The 6 sub-regions within the NWRA can be summarised as follows:

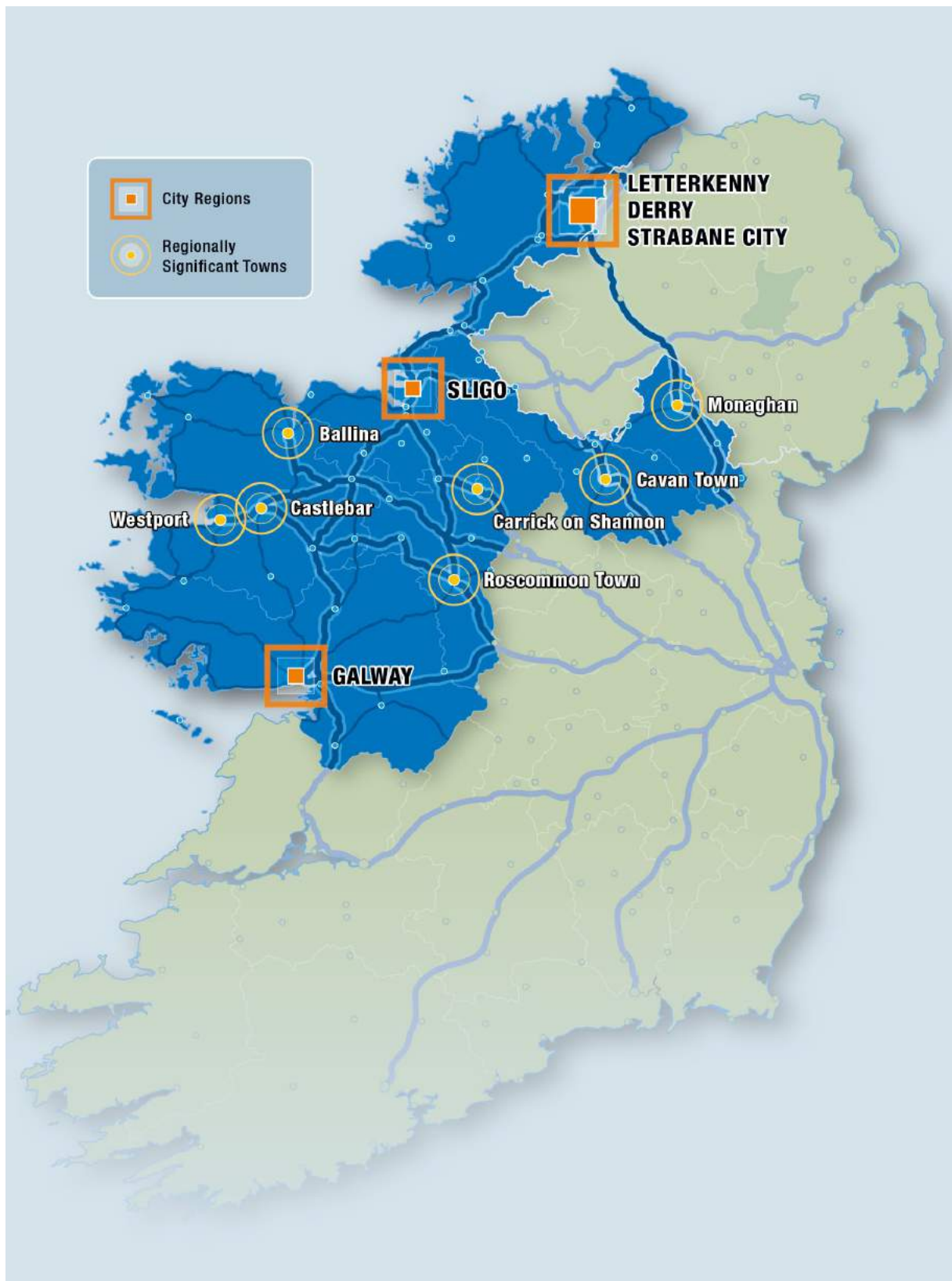
- **Galway City Region** – extending into Shannon, South Mayo and South Roscommon, as well as into North and West Galway County.
- **Sligo City and its wider environs**, extending into South Donegal, Leitrim, North East Mayo, and as far as Enniskillen.
- **Donegal and Derry** – including the City Area of Letterkenny – Derry /Strabane.
- **County Mayo** – covering the urban centre's of Castlebar, Ballina & Westport.
- **Monaghan / Cavan** – with a wider reach into the M1 corridor to the East, and extending into the Greater Dublin Area (GDA) but also critically reaching into Northern Ireland.
- **Athlone - Roscommon Corridor** – extending into a significant area of Mid and South Roscommon, East Galway and parts of Offaly, Westmeath and Longford counties.

3.2 The Urban Hierarchy of the NWRA

The NSS Expert Review Group concluded that the Gateways should in some form be retained in the NSS successor document, describing them as 'self-selecting' and being the key Regional drivers and influential in terms of National success.

The NWRA would strongly subscribe to this approach, and to the retention of the Gateways of Galway, Sligo and Letterkenny/Derry. The designation of these key urban centres as City's / City Region's / Gateways, will reinforce the concept of the Atlantic Economic Corridor (AEC) as being comprised of a network of major urban Regional Centres which extend the length of the Atlantic Seaboard, and incorporates the crucial element to enable effective regional development, with at least 2 designated centres north of the Dublin – Galway axis. The retention of Sligo and Letterkenny / Derry in light of the present and ongoing threat of BREXIT is particularly critical to the North West, which has been the one area in the state to suffer from a drop in overall population (primarily as a result of out-migration) as per the preliminary results of the 2016 Census.

¹ <http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=EP001&PLanguage=0>



Map 2: The Urban Hierarchy – City Regions & Regionally significant towns.

3.3 Capacity for Expansion Within Our Urban Centres

There is significant capacity within all of the 3 outgoing Gateways (Galway, Sligo and Letterkenny / Derry) to expand in population, and critical mass, with all 3 centres capable of adding to service and employment provision.

There are other alignments which will accompany the AEC in terms of linkages, and they include the future convergence of the Institute's of Technology into a Technological University, that incorporates IT Sligo, LYIT and GMIT, and the continued development of NUI Galway. In addition to the HSE's cancer care centres of excellence, as well as economic advantages, and the capacity to dramatically reduce travel time to the North West from (inter-alia) Shannon Airport, Galway City and Port, and Ireland West International Airport.

Galway City Region: The Galway City Region has been the urban success story within the NWCR region in recent times, and has continued to grow in the last 15 years, with its population scheduled to pass 100,000 shortly beyond 2020 if the current rate of growth continues in the coming years. Galway is a centre of excellence in terms of its third level educational offering, and has been extremely successful in attracting, and retaining multiple med-tech, and ICT companies, including Cisco, Medtronic, and EA Games.

Galway can continue to grow, and prosper, however, there are a number of key barriers which must be addressed to enable this, which include:

- the timely advancement of the Galway Port project,
- the implementation of the Galway City Transport Strategy, and by extension,
- the N6, Galway City Ring Road (GCRR),
- Additional wastewater infrastructure, including treatment capacity.

Letterkenny-Derry / Strabane (North West City Region – NWCR): A model of partnership has been established between Donegal County Council / Derry and Strabane District Council via the North West Strategic Growth Partnership, which is anchored by the NWCR. This area comprises the fourth largest City Region on the island in terms of critical mass, with a population exceeding 350,000 within a 30km radius of Letterkenny / Derry / Strabane. This area is characterised by very significant cross border dependencies, illustrated by the fact there are in excess of 300,000 vehicular movements per week between Donegal and Derry / Strabane. There are interdependencies in education, healthcare, retail trade, as well as large sections of the population traversing the border each day commuting to work.

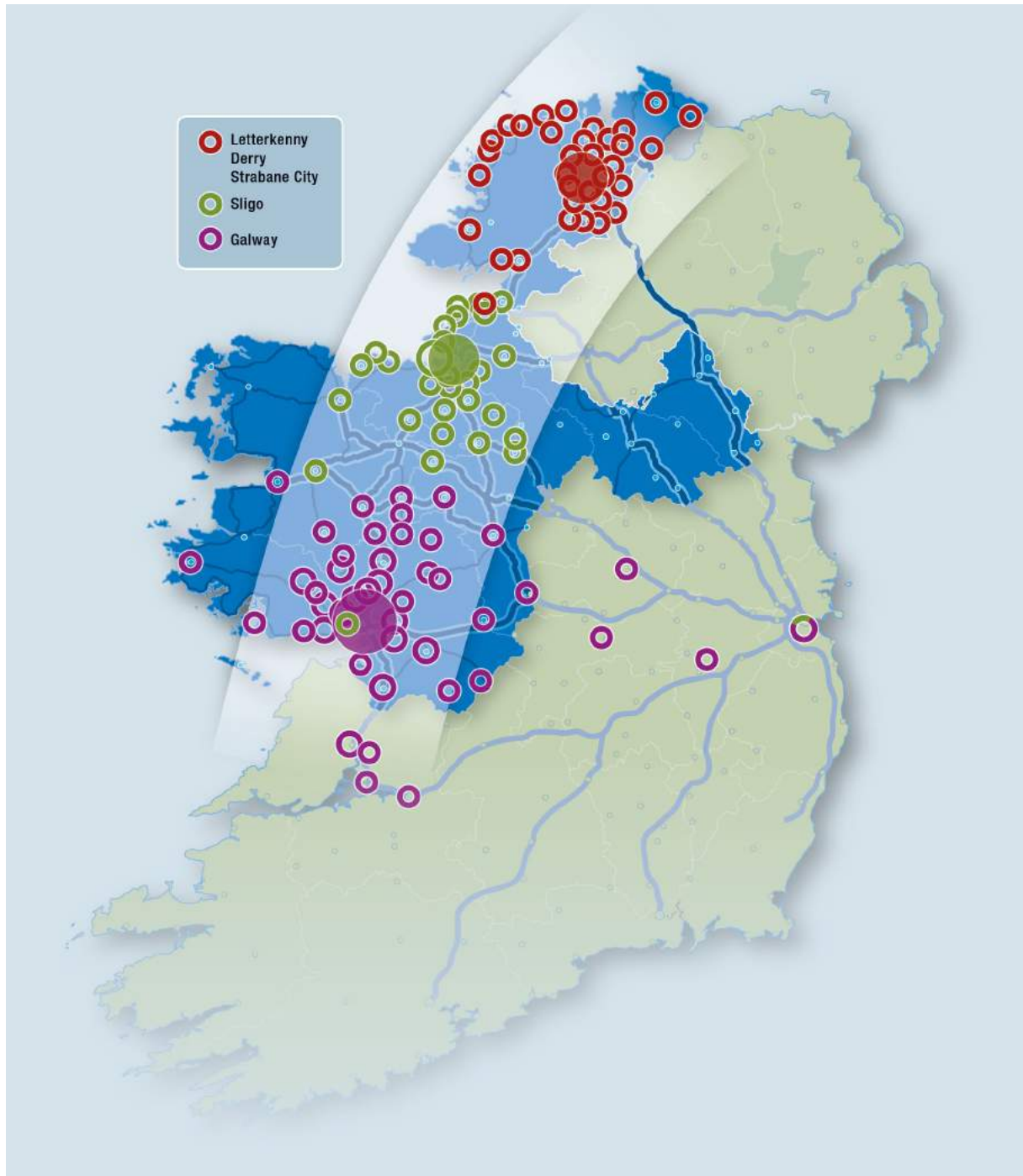
The North West has historically demonstrated significant resilience in competing within its peripheral environment, with mobility

CITY	CURRENT POPULATION	ZONED RESIDENTIAL LAND	ZONED INDUSTRY / ENT / EMPLOYMENT	WASTE WATER CAPACITY (Pop. Equivalent)
GALWAY	80,000	9,000 Houses Equiv.	400 Hectares (est)	91,000
LETTERKENNY part of NWCR	20,000	50 Hectares	112 Hectares	40,000
SLIGO	20,000	395 Hectares	133 Hectares	35,000

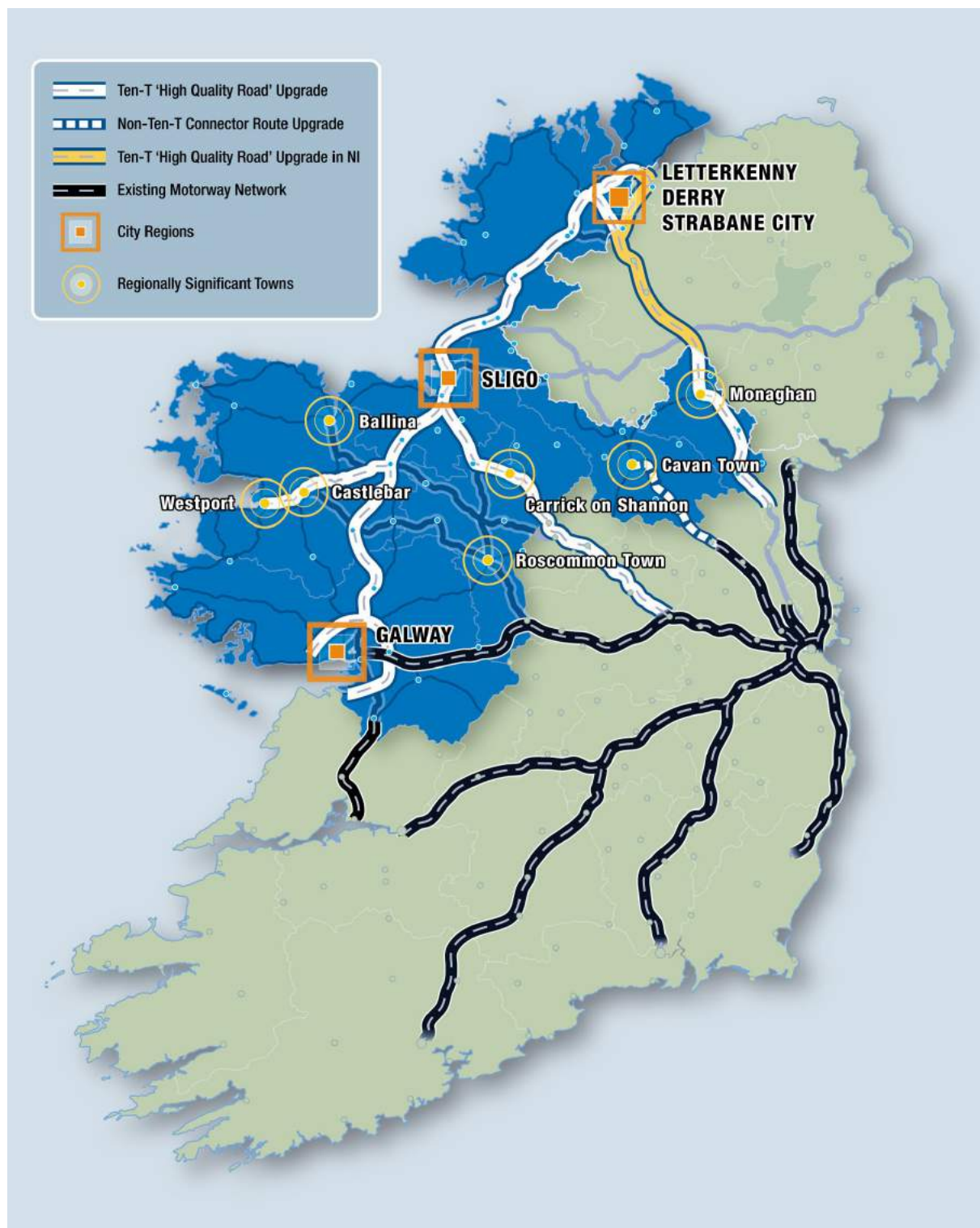
Table 1: City Region capacity

and accessibility constraints hampering competitiveness due to poor infrastructure provision, including road infrastructure. The removal of road infrastructure deficits would enable the advancement and growth and competitiveness of this region, increasing its critical mass through the advancement of a number of vitally important projects that will enhance connectivity between its urban centres and beyond. These projects are as follows:

- i. an expedited delivery of the upgrade of the N2 / A5 linking the NW with the Dublin/ Belfast motorway east of Ardee.
- ii. the advancement of the N14 route linking Letterkenny to A5 at Lifford / Strabane, and
- iii. improved access via the upgrade of the N15 from Derry to Letterkenny and on to Sligo, including the by-passing of Ballybofey-Stranorlar.



MAP 3: The Linear City / AEC – Pattern of Travel to Work & Commuting– the 3 City Regions



Map 4: Critical enabling Road Infrastructure for the Region

Sligo City region: There is an approximate population of 20,000 people living in the Sligo Town area, with another 20,000 living within 15km of the Town, giving the Sligo Gateway region a sizable total population 40,000. Sligo has a number of distinct advantages in terms of its position as a Gateway in serving a large hinterland in the North West, an historic, and compact urban core, outstanding heritage offer, and a distinct cultural identity and landscape attributes. IT Sligo, St. Angela's College, and Sligo University Hospital underscore Sligo's role as a Regional driver, and a number of major employers in of Pharma and Engineering underpin this role, including AbbVie and Lotus Engineering.

In order to facilitate the expansion of the 3 main Urban centres, there is a clear need to deliver significant enabling critical road infrastructure to the Region, and there are a number of projects which are hugely significant, and in need of accelerated advancement.

Critical enabling Road Infrastructure for the Region

- The advancement of the upgrade of the N2 / A5 / N14 to a Ten-T 'High Quality road' standard from the North West City Region (NWCR) to Monaghan and on to Dublin.
- The upgrade of the N4, to a Ten-T 'High Quality road' standard, from Mullingar – Longford – Carrick on Shannon – Sligo.
- The upgrading of the Atlantic Economic Corridor (AEC), to a Ten-T 'High Quality road' standard, from Letterkenny – Sligo – Galway (N15 and N17).
- The implementation of the Galway City Transportation Strategy.
- The completion of the N6, Galway City Ring Road, to a Ten-T 'High Quality road' standard.
- The upgrade of the N5 from Westport to the N17. to a Ten-T 'High Quality road' standard.
- The improvement of the N3 from the M3 to Cavan (non Ten-T connector route) to a Ten-T 'High Quality road' standard (or equivalent).

3.4 Economic activity levels

3.4.1 Current capacity of the region to be critical to the overall sustainable development of the island

Ireland is performing reasonably well in broad terms when benchmarked against other countries. It generally finds itself in a top 15 position across most international indices such as well being, development status, etc. In the case of world competitiveness, the most recent analysis by the World Economic Forum places Ireland at 23rd in the world, up one place from their 2015 analysis. While this is a positive indication of an improving status, what is more useful is to examine the sectoral detail of the WEF Report in order to gain an understanding of some of the key challenges confronting the State at the present time. The Forum defines, and is now acknowledged across the world by most countries to set the definition of, world competitiveness as "the set of institutions, policies, and factors that determine the level of productivity of an economy." They examine within this context, 12 pillars in order to establish competitiveness and, within these 12 pillars, a 140 set of indices pertinent to each pillar that enables international benchmarking. The importance of this is that it allows policy makers to understand how a country is placed at a particular level. Similar methodologies are used in other international benchmarking processes.

From the point of view of a policy maker this is of use as it helps to identify areas which are strong in an economy and those areas requiring a policy response to mitigate a poor position. Broadly speaking Ireland does well in having an institutional framework that allows for a competitive economy. It is placed 12th in the world. However, it does rather less well when it comes to the provision of infrastructure, being placed 29th in the world. It also scores poorly in the unstable macroeconomic environment being placed 43rd, mainly due to the continuing

high levels of debt while it scores 67th in the state of the financial markets mainly due to the continuing need to stabilise the banking system and open up access to finances for investment by both the public and private sectors.

In other pillars there is a reasonably respectable scoring with health and education at 13 in the world, despite the commonly held views of the health system, higher education and training also at 13th again in spite of the perception of a poorly performing higher education sector, goods market efficiency is placed at 5th while labour market efficiency is placed at 12th. Business sophistication is placed at 16th and importantly, the country is placed 12th and 19th in technological readiness and innovation respectively.

The above broadly indicates a successful economy. The higher placings suggest an economy which, in the context of coming transitions to development, is well placed and so policy makers can focus on the few extreme pillars highlighted in the index whilst seeking to sustain other levels of performance.

The importance of the above becomes clear when looking at our understanding of society in the 4th industrial revolution. Innovative economies will become, unsurprisingly, the best placed to be competitive as factors such as peripherality become less relevant. This is so particularly given the re-ordering of world trade movements and the enhanced technological platforms which will underpin liveability and well being across the globe.

Equally, the sharing economy and co-production platforms for public services are becoming critical features of competitiveness and this is most likely to take place in countries and regions with highly developed institutional arrangements which allow for the integration of bottom up initiative with top down direction and support. In other words, inclusiveness is now a critical pillar in underpinning the capacity of a state or region to compete and such inclusiveness and the collaborative arrangements that go

with it are now increasingly to be found in the most successful regions of Europe, the US and Australia/New Zealand. Ireland's policy framework already places concepts such as co-production at the heart of public service delivery and so is well placed to build collaborative platforms involving arms length delivery and private public partnerships.

In the case of the Northern and Western Region, while it does score reasonably highly in indices such as the EU Social Progress Index, there remains critical infrastructure gaps which undermine the capacity of the region to take advantage of the quality of life available in the region.

3.4.2 Gross Value Added (GVA)

GVA of the BMW region (figures only available at NUTS III Level which include Louth which is outside the NWRA functional area) increased by almost 7% from 2011 (qt4) to 2015 (qt4), which, when compared to the national figure, is almost on par. However, the gap between the Border Midland West and Southern and Eastern Regions remains significant, with the Southern and Eastern region accounting for over 74% of the national GVA and the Greater Dublin area accounting for almost 45% of this figure.

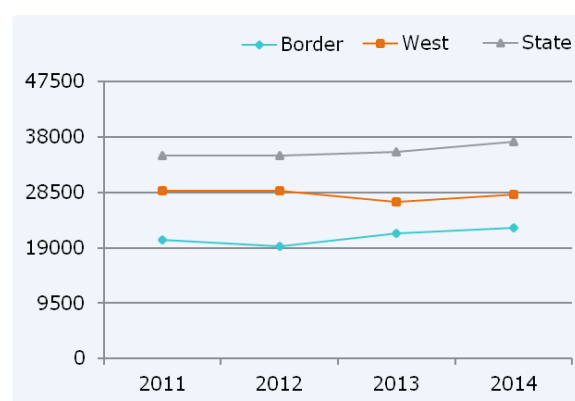


Figure 1: NUTS III- GVA

3.4.3 Employment

Employment within the Northern and Western Region continues to see an increase with a 3.29% increase from Qt 4 2015 to Qt 4 2016 to 385.9 (ths)². One of the largest growth areas of employment within the NWRA is employment within SMEs, which seen an increase of over 7,060 between 2010 to 2014, in companies of with between 10 and 19 employees (Medium Sized).

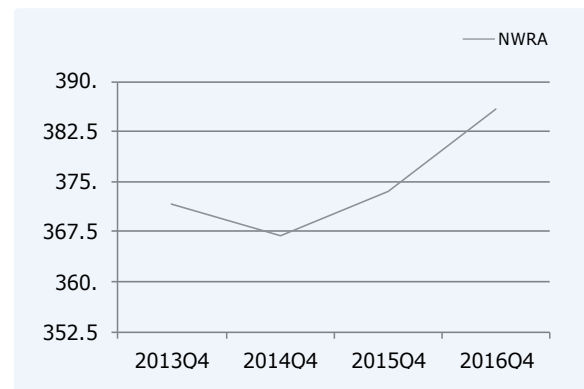


Figure 2: Employment Figures NWRA region

Case Study #1:

EXPANDING THE RURAL EMPLOYMENT BASE: Údarás na Gaeltachta's Digital Hubs – Galway, Mayo & Donegal Gaeltacht

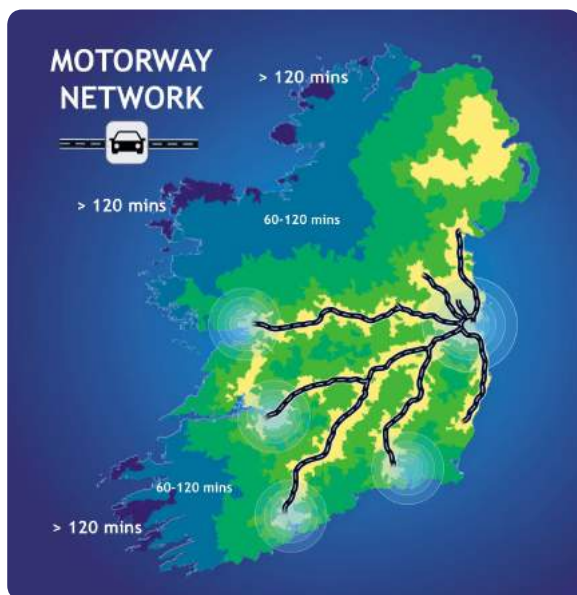
Údarás na Gaeltachta is currently piloting a number of development initiatives which provide for the integration of key services and infrastructure in support of developing new start-ups, supporting existing SMEs and in consolidating and expanding the rural employment base. These Digital Hubs have been developed to provide fibre-grade connectivity as part of the enterprise infrastructure and the range of available services provision at specific rural locations.

Within the Gaeltacht districts included in the Northern and Western Regional Assembly area, similar projects are in development in Carrigart in Donegal, in Carraroe in Galway and in Belmullet in County Mayo. The integrated suite of infrastructure and supports provided at these facilities will assist in establishing new enterprise start-ups, in growing new HPSU-qualified enterprises, in sustaining and creating employment opportunities and in expanding the range of training interventions in support of rural and economic regeneration strategies.

² <http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=QNQ22&PLanguage=0>

3.5 Infrastructure (Road)

Recent improvements to national road network have largely centered on connectivity into Dublin. The Region outside of Galway remains largely dependent on a less than adequate national route system, not to mention cross regional connectivity which is almost wholly non-existent with the exception of Bus Éireann services from Galway up to Sligo with connecting services into other key centres in Donegal.



MAP 5: Motorway Networks

The opening of the M17/18 from Gort to Tuam will have a significant and positive impact in accessing into Shannon and Limerick from Galway and South Mayo but, as highlighted above, there remains considerable necessity to advance critical road based provision if the expectations of the Atlantic Economic Corridor are to be achieved.

Surface Transport

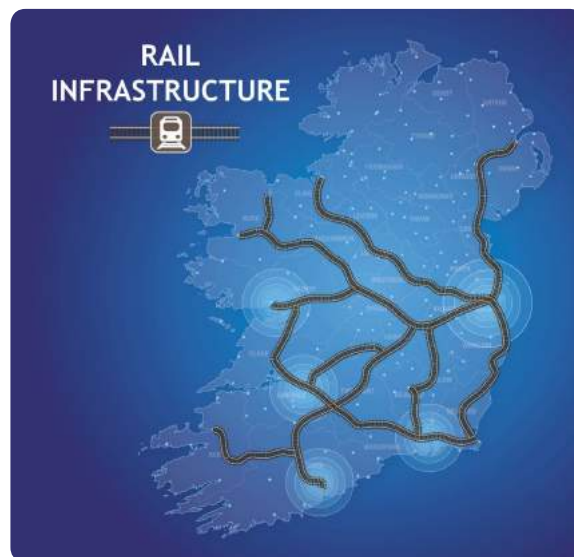
Bus based public transport in the region is based upon reasonably frequent intercity services operated by Bus Éireann and several larger providers into Galway and Letterkenny in direct competition with the State Company. However, even for many reasonably sized towns there is a complete dependency on provision by the State Company, including Ballaghaderreen the location of the Region's headquarters.

In the event of any form of re-configuration of such services it will be critical that current levels of service provision are sustained for the next decade as population stabilises and grows across the region.

In addition, rural transport is provided across the region but there is limited clock face connection between such services, the national bus services and those rail based services provided by Irish Rail.

Rail

The region is reasonably served with regular inter city services from Dublin to Galway, Westport and Sligo and services from Galway to Limerick. North of Sligo into Donegal there are no services albeit that there is a limited option of using services from Belfast across to Derry and hence by road, into Letterkenny. Rail freight from Mayo is one of the most significant rail freight corridors on the island albeit that it is transited through increasingly congested lines in or near Dublin in order to access the Port of Dublin and to a lesser extent Waterford.



MAP 6: Rail Infrastructure

Currently renewal plans for a rail freight line back into Shannon/Foynes Port are being prepared for approval. This opens the possibility of a longer term re-configuration of freight movement from Claremorris to Shannon/Foynes in the event of increased congestion in and around Dublin.

There is an existing unutilised but in care railway line from Galway up to Colloney taking in Tuam, Claremorris and Tubbercurry and other smaller towns and villages which runs in close proximity to Ireland West Airport Knock. There has been a long standing campaign to re-open this line as well as a campaign to use the line as a part of a long distance off road cycle/walkway. The relevant development plans in Galway, Mayo and Sligo acknowledge the need to preserve the line for future potential development for rail purposes. The retention of existing and under-used alignments in public ownership should be a priority, as this cross-radial rail corridor has the capacity to deliver sustainable transport options proximate to the Atlantic Economic Corridor.

Air



Air travel in Ireland has seen an increase in the past 3 years, following the fallout from the economic downturn. According to World Bank in 2015 over 113.1m passengers in that period were carried from Ireland and it is anticipated that such growth will continue to increase with the increased competition and lower fares offered by companies like Ryanair. The NWR through a European transnational project-SPARA 2020 - have carried out a review of the 2 airports offering scheduled services within its jurisdiction, in association with ALG associates.

Ireland West Airport Knock is situated in a relatively remote area, serving an area with moderate population density. In 2013 the Ireland West Airport Study Group Report recommended a growth strategy for the further development of Ireland West Airport Knock, targeting significant infrastructural investment with a view to growing passenger numbers to 1.3 million by 2023.

Moves are apace to consider the national economic and social importance of IWA Knock and its consideration as a Strategic Development Zone. A key element of the Strategy was a proposal that seven local authorities in the region (Donegal, Galway City, Leitrim, Mayo, Roscommon and Sligo) would collaborate to purchase an equity stake in the Airport and this was realised in 2016 when the Local Authorities took a 17.5% equity stake in the airport. The Ireland West Airport Knock is essential to the economy of the state, with a large impact on Gross Value Added (GVA), local jobs and tourism development. Despite its distance to the nearest principal population centres, Sligo and Galway, the airport handles a relatively high volume of passenger traffic, being the 4th busiest airport in Ireland, after Dublin, Cork and Shannon. In 2015, the airport served 685,485 passengers, slightly below the traffic of the previous year, which was the highest in the airport's history, and this was surpassed in 2016 with passenger numbers exceeding 730,000 for the first time in the airport's history. According to the IWA Knock's Business Plan for 2015-2019, the airport expects to grow 23% by 2019 by increasing its capacity, load factors on current services, adding new European routes and the recommencement of US charter services from 2017. With traffic increase and improved turnover per passenger, the airport expects to enhance its revenues and profitability. IWA Knock provides direct connections to over 21 international destinations in Europe, including the UK, and has occasional charter services to Europe and North America. The airport has the third longest runway in Ireland and is able to handle all foreseeable types of aircraft.

Ireland West Airport Knock is strategically located to serve the population of Connacht province with approximately 540,000 inhabitants, Galway City (75,000 inhabitants) and Sligo City (20,000 inhabitants). The location of the airport, at the intersection of two primary roads – the N5 and the N17 – is strategic to maximize its catchment influence over the West, North and Midlands regions of Ireland. Across the three regions, the airport is estimated to serve a quarter of the country's population and a population of approximately 1.2 million people.

Donegal Airport (Aerfort Dhún na nGall) serves the County of Donegal and is located in the west coast of the county in the area of Rosses-Gweedore, having an immediate catchment area of approx 100,000 and is the most peripheral airport in Ireland.

In 2015 36,552 passengers used Donegal airport and this figure increased to 44,156 up by 21% on 2015. Currently, the airport serves two scheduled destinations – Dublin (DUB), domestic, and Glasgow (GLA), international. In addition the airport handles General Aviation, Search & Rescue/Aer Corps Actions and offshore gas/oil exploration activities.

Water and Wastewater

Water: Irish Water is currently preparing a National Water Resources Plan that will identify current and potential future demand for water and how we will plan our services in the medium to long term to ensure that there is sufficient water supply available to facilitate planned growth. It will seek to build reliability and resilience in our water supply networks by interconnecting networks where possible or develop back-up sources, treatment and storage facilities.

A high level review of current water supply in what they consider to be the 10 principle towns in the region (Donegal Town, Letterkenny, Carrick-on-Shannon, Roscommon, Castlebar, Westport, Sligo, Monaghan, Cavan and Galway) indicates that while there may be some current

issues with distribution networks and treatment capacity/quality, it does not anticipate that there will be an issue with servicing growth in these centres in the next 25 years particularly if Irish Water's strategy of managing water resources at a national and regional level can be implemented.

Wastewater: Wastewater services are largely managed at settlement/agglomeration level. Indeed there may be a number of treatment plants serving a large metropolitan area although this is not generally the case in the North West Region. Achieving the necessary compliance with discharge authorisation limits is currently the focus of Irish Water's investment in wastewater infrastructure and is likely to continue to be the investment driver in the medium term. It is critical that the NPF provides leadership and direction for the prioritisation and provision of strategic infrastructure up to 2040 and beyond.

Discharge authorisation limits are influenced by the quality objectives and protection status of the receiving water body. A number of the larger agglomerations in the North West Region discharge to protected or Nutrient Sensitive waters and as such the authorisation limits reflect this status; e.g.;

- Letterkenny WWTP discharges to Lough Swilly SAC/SPA.
- Donegal Town WWTP discharges to Donegal Bay SAC/SPA.
- Westport discharges to Clew Bay SAC/SPA.
- Galway WWTP discharges to Galway Bay SAC/SPA.

While quality objectives/protection status do not necessarily preclude the further expansion of a treatment plant to cater for further growth it is likely to increase the cost of treatment (both monetary and energy use) process and presents difficulty in getting planning approval for such an expansion.

All of the treatment works in the above 10 agglomerations have some spare capacity for treating additional sewage load although not all

of the treatment plants are currently compliant with their discharge authorisation. Upgrades of collection networks may be required to accommodate new development and a number of studies and upgrade works are already underway in a number of these towns to alleviate current problems.

With respect to Galway, while there is currently significant capacity available in the Mutton Island Plant, in the longer term it is envisaged that a second wastewater treatment plant to the east of the city could facilitate both the growth of the City/ Eastern Environs and further economic development of the designated strategic corridor. As part of the Drainage Area Plan study for the city which is currently being commissioned, Irish Water will prepare a medium to long term strategic drainage plan for Galway.

The above is subject to constraints that may be imposed by measures that may be included in the River Basin Management Plan and due to climate change with respect to both water and wastewater and assumes a reasonable distribution of forecasted growth. It also assumes that funding will be available to invest in the upgrade of networks and treatment works required to accommodate planned growth.

Broadband and telecommunications

The development of a high speed fibre or wireless technology broadband throughout the entire NWRA region is now a necessary requirement which the National Broadband Plan acknowledges. Within the NWRA there are currently counties with little to no access and places that record download speeds of as low as 1.98Mbps. As a region now increasingly noted for the level of entrepreneurship, the quality of life of those residing and working is hindered by the poor broadband on offer. The roll out of this essential infrastructures will allow the region to compete for jobs, tourist, students, research, FDI, industry, energy, and remote working/ work from home..

The Western Development Commission in their publication in 2012 noted that *If centres in the Western Region are to compete, retain and attract investment and support job creation, investments in various technologies, including fibre networks, must be made so that the Region is not disadvantaged in its broadband capacity and quality of service.*³ In 2017 this remains the case.

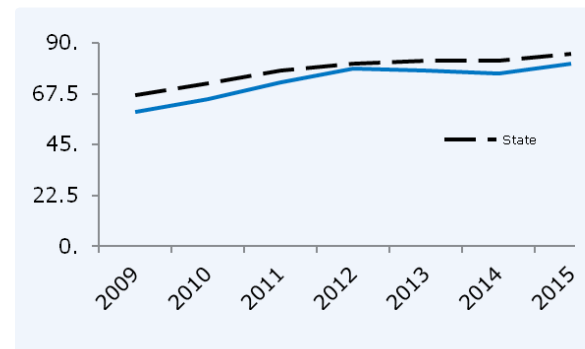


Figure 3: % of Household with Broadband Access NWRA

Flooding and coastal protection defences

Flooding remains a considerable challenge within the Region due to the impact of the Shannon, Moy, Erne and Corrib Catchments. Nonetheless, work on development of appropriate responses is well advanced. The CFRAM programme and its implementation over the coming decade will provide considerable capacity to provide alternative locations for investment by both public and private sectors. This will be particularly significant in the case of other parts of the island becoming even more severely constrained by the impact of climate change and the resulting adaptation costs associated with flood resilience. It is imperative for the NPF to take known flood risks into account when formulating spatial policy, investment decisions and prioritisations.

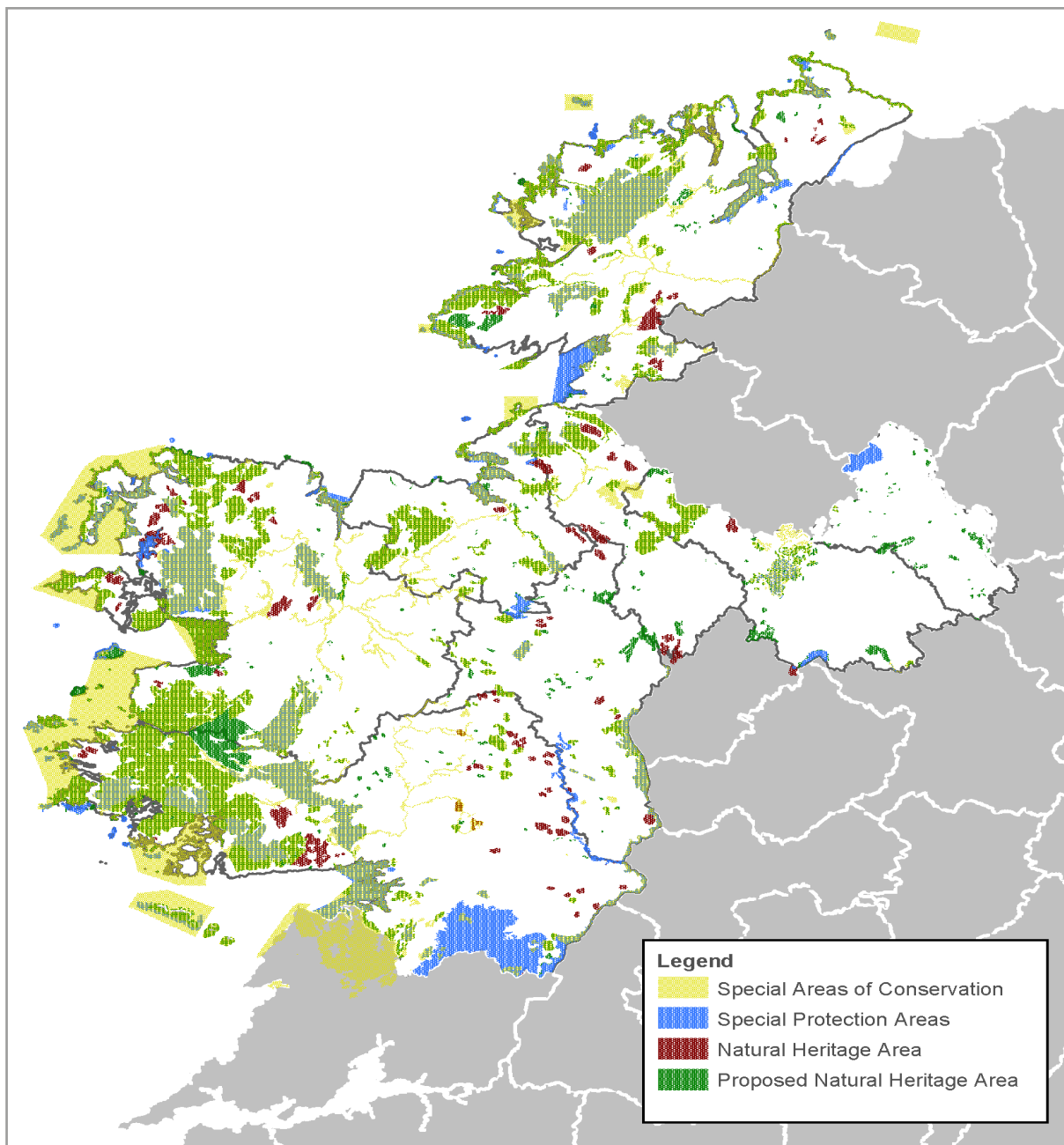
³ <http://www.wdc.ie/wp-content/uploads/WDC-Connecting-the-West-Next-Gen-Broadband-2012-large.pdf>

3.6 Natural Assets

3.6.1 Natural resources – A region of outstanding Environmental Assets & Cultural Heritage

The Northern & Western Region boasts some of Ireland's most outstanding landscapes, and cultural highlights, these landscape's are living rural area's, incorporating densely, and indeed sparsely populated countryside as well as

tracts of wilderness, together with Gaeltacht area's with culturally distinct villages & towns. The West coast from Galway Bay to Shroove on the Inishowen Peninsula is home to 34 Blue Flag Beaches, and a coastline of dynamic eco-systems, and spectacular headlands. In addition to our coastline, there is an outstanding and arguably largely untapped offering of historic cultural sites beyond what lies long the Wild Atlantic Way.



MAP 8: Natura 2000 Site Designations within our Region.



**Photo - Tramore Beach, Downings, on the Rossguill Peninsula, Co. Donegal
- Muckish Mountain in the background.**

The landscapes of the West of Ireland are internationally renowned, but there is currently no landscape trail, or series of recognised attractions to coherently package these attractions (either at home or abroad) outside of that which is the Wild Atlantic Way (WAW). One of the difficulties in compiling such a trail is the multiplicity of agencies involved in the delivery of tourism, including the Department of Transport, Tourism & Sport, Fáilte Ireland, Tourism Ireland, Local Authorities, and other agencies, such as Udaras na Gaeltachta, Chambers of Commerce, and the Hotel Federation.

There may be some merit in establishing an umbrella group, potentially at Regional Assembly level, to successfully identify and message the unique assets which are so apparent in the Northern and Western Region. Currently, many Local Authorities are preparing Tourism Strategy's for their area and this presents an opportunity for a more integrated and collaborative approach to be adopted to the management and marketing of this region as a unique destination. By way of example, it would enable integrated Landscape Trails (both environmental, spiritual and cultural) to be identified across the region's catchments, capturing destinations and outstanding attractions that are both within and outwith the route of the Wild Atlantic Way, such as:

National Parks

- Connemara National Park, Co. Galway.
- Ballycroy National Park, Co. Mayo.⁴
- Glenveagh National Park, Co. Donegal.
- The Marble Arch Caves Geo-Park, Co. Cavan & Fermanagh.

Further Examples:

Iconic Mountains: Croagh Patrick, Co. Mayo, Knocknarea & Benbulbin, Co. Sligo, & Errigal, Co. Donegal. Rivers & Lakes: The Shannon – Erne Blueway from Athlone to Ballyshannon, incorporating the Royal Ulster Canal. Outstanding Historic Sites: Dun Angus, Aran Islands⁵, Rathcroghan, Co. Roscommon⁶, Griannán of Aileach, Burt, Co. Donegal.

In summation, the NPF should set the framework for the Regional Spatial and Economic Strategies to catalog the Country's most outstanding Environmental & Cultural assets, and devise a strategy with the OPW, and other directly involved stakeholder agencies to ensure these resources can be best utilised by our own citizens and visitors to the Country.

⁴ Tentative list of Irish World Heritage Sites, 2010 Unesco.

⁵ Tentative list of Irish World Heritage Sites, 2010 Unesco.

⁶ Tentative list of Irish World Heritage Sites, 2010 Unesco

Increasing Regional Tourism Share (including Adventure Tourism)

With the opportunities for growth presented by the Wild Atlantic Way (WAW) and the targets set out by Fáilte Ireland, to increase visitor numbers along the WAW to 25 million tourists by 2021, there may be merit in looking at more nuanced Regional focus to grow the tourism product within Mayo, Sligo & Donegal in particular and linking it with the significant tourism potential presented by the Shannon-Erne lakeland catchment, located within the Ancient East.

This regional focus should incorporate the additional potential of the Northern & Western Region as a world renowned location for adventure tourism, whether in water sports, hiking, Climbing, or surfing, with internationally renowned locations such as Bundoran & Mullaghmore already well established in their reputation as exceptional destinations for big wave conditions.

3.6.2 Tourism



MAP 9: Overseas Visitors

2015 saw an increase in revenue from both international and domestic tourism, to over €7,506.4m, with overseas visitors growing by

13.1% to 8.0m⁷. When broken down to regional figures in 2016, the West and Northern region recorded the lowest overseas visitor numbers of 2,447 (m) generating a revenue of €614m.

The North West region recorded a revenue of €121m⁸, and over 50% of all tourists to NWRA region visited Galway. Other counties in the Region perform less well and therefore should have the capacity to grow to take a more even share of tourism activity relative to the State as a whole.

It is predicted that the direct contribution from Travel and Tourism nationally to GDP will grow to 2.3% by 2025. The Northern and Western Region is perfectly poised to support the projected increase in visitor numbers. Market saturation may have plateaued in the East and South, with market share gains most achievable in this region. The National Planning Framework needs to consider the potential of Tourism to this region by adopting policies that support airport accessibility and internal mobility and connectivity.

Cultural Tourism as an Economic Resource

The development of a successful and sustainable tourism economy must form a critical dimension of the overall regional development strategy. Drawing on the region's comparative and competitive advantages, the approach to investment and development within this sector will build on a model of 'cultural tourism' which will differentiate the product offering and which is driven through exploiting the endogenous tourism asset-base.

Investment programmes in this sector should focus on private, community or public-sector projects which have the potential to scale –up as regional and national projects of significance. Projects can be developed which have the potential to generate significant socio-economic impact and increase foreign revenue earnings which draw on the green/eco resource

⁷ Fáilte Ireland Tourism Facts 2015

⁸ Fáilte Ireland Tourism Facts 2015

(walking, green ways, cycling, archaeology and human heritage); activity tourism (marine and blue tourism; recreational and sports, for example); and projects which celebrate local artisanal food, beverages and craft products. The regeneration of the Ulster Canal would be one large scale project which would bring considerable benefit to communities along the border with Northern Ireland.

At a strategic level, there is a need to configure future investment and development programmes in such a way as to fully integrate and reinforce the potential of the Wild Atlantic Way concept both as an international marketing brand and as a co-ordinating mechanism. The development of the unique 'cultural tourism' offering will require a cross-agency approach to ensure that the overall strategic vision, and the operational and funding programmes required to support its realisation, can encourage sustained rounds of targeted investment from public, private and community resources over longer time-lines.

3.7 Agri-Food

The agri-food sector is very important potential growth sector for the Region, with it accounting for almost 36% of the National Agriculture output. The agri-food sector encompasses primary production (agriculture or farming), forestry, fishing, food and drinks (excluding tobacco) and wood-processing. Exports of Food and Beverages nationally increased by over 50%, since 2009, to €12bn and by the end of 2015 the Agri food sector accounted for 7.6% of national GVA, exporting to the UK, US, China and France.

The agri-food sector is the largest cross-border trading sector on the island of Ireland and in 2016 there were some 35,000 persons in this region, over the age of 15 years, employed in Agriculture, Forestry and Fishing (see Fig below).

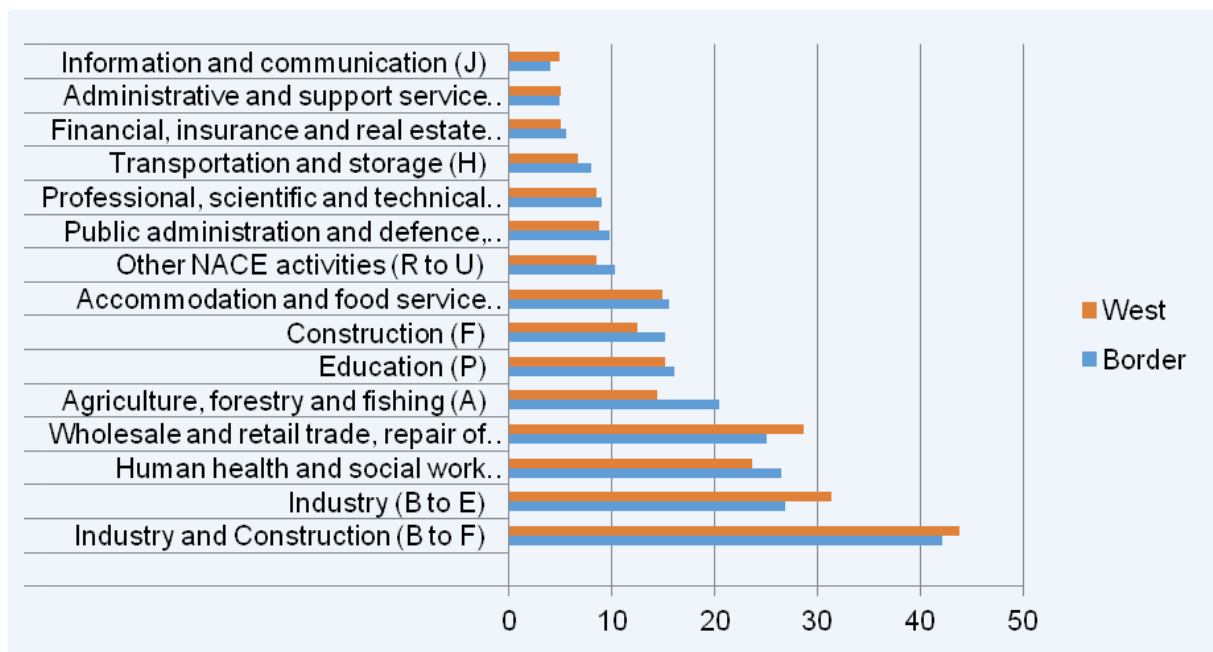


Figure 4: Persons aged 15 years and over in Employment (Thousand) by Region (West and Border) Qtr 4 2016 CSO

Britain is the main export market for agri-food and cross-border trade is strong in dairy, beef, and sheep meat and drinks. Thus, whilst the full ramifications of Brexit will not be known until such time as the UK has formally negotiated the terms of its exit from the EU, the potential impact is significant for the national agri-food sector but particularly so for this region. By way of example, approx. 800 ma liters of milk from Northern Ireland is exported to the Republic for processing annually, and the imposition of a hard border with tariffs would be disruptive, not just because of tariffs and customs checks, but because of the burden of paperwork relating to issues including traceability, animal welfare and food standards.

Within this context, the competitiveness of the region needs to be to the forefront through actions such as the redressing of infrastructure deficiencies in the region and through providing platforms for collaboration and knowledge transfer that enable potential benefits to be derived from clustering or the creation of

sectoral ecosystems. Those benefits can include access to an appropriately skilled and highly mobile labour pool, local supplier linkages and the acceleration of the transfer of information and knowledge leading to the development of new products and services. Through the resource of Teagasc, the education sector and other stakeholders, there is significant potential to build on this agricultural industry, including developing food innovation hubs and dedicated food incubation centre in the region, and help food companies with high potential to upscale. There is also potential for a co-ordinated approach to supply chain development in the forestry/biomass sectors to maximise economic output and to provide innovative renewable energy solutions for businesses and communities, together with the adoption of energy efficient technology. Thus delivering climate change/low carbon solutions for Ireland and importantly improve the economic, social and economic well-being of communities in the region.

Case Study:

Aurivo Co-operative Society Limited

Aurivo Co-operative Society Limited is a globally focussed, innovative, multipurpose agricultural co-operative with business interests in Dairy Ingredients, Consumer Foods, Agri. Stores, Animal Feed Milling and Livestock Marts & Trading. The business turnover is in excess of €400M and they employ over 700 staff directly and provide additional jobs in transport, distribution and forestry. They have over 10,000 members and are supplied by over 1000 dairy farmers throughout the west and Northern region.

Aurivo launched a joint venture energy company Glanoir in 2013. This energy company uses CHP (combined heat & power) technology at their Dairy Ingredients plant in Ballaghaderreen, Co. Roscommon and it is powered using Biomass (woodchip), displacing approximately 50% of heavy fuel oil that is currently used.

Case Study:

Masonite

Masonite Ireland is one of Ireland's largest manufacturing facilities with a site area of over 150 acres and a production facility which spans 15 acres under one roof. The plant is located along the banks of the River Shannon outside, Drumsna, Carrick-on-Shannon in Co Leitrim and it is a subsidiary of Masonite International Corporation, the world's leading Door Manufacturer, headquartered in Tampa, FL, USA.

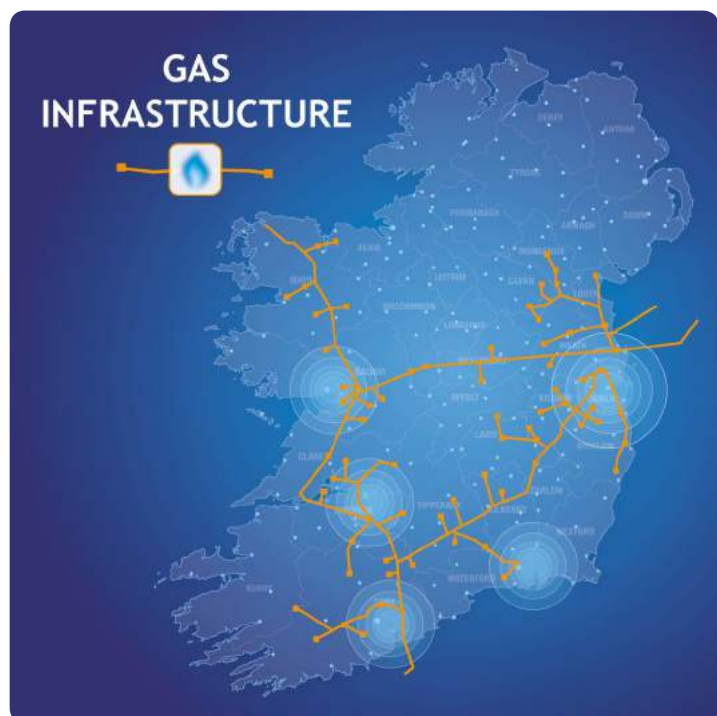
Masonite is major player in economic infrastructure of the North West with a "state of the art" facility, employing in excess of 200 people and contributing on the order of €50 Million into the local economy.



3.8 Energy

The European Commission has proposed a roadmap to move to a low-carbon economy by 2050. The roadmap aims to reduce carbon emissions EU wide by 80% to 95%, compared with 1990 levels. The roadmap sets out milestones for a 40% emissions reduction by 2030 and 60% emissions reduction by 2040. EU leaders have agreed to reduce emissions by at least 40% by 2030, with a 27% target for renewable energy penetration. Negotiations are taking place to determine how the burden of this reduction is to be shared among Member States. (Source SEAI).

This presents both a challenge and an opportunity for the Northern and Western Assembly. The core comparative advantage of the area is its low population density, relative low level urban settlements and embedded and expansion capacity of Renewable Energy Production Capacity. The transition to a low carbon economy is a strategic priority for the state.



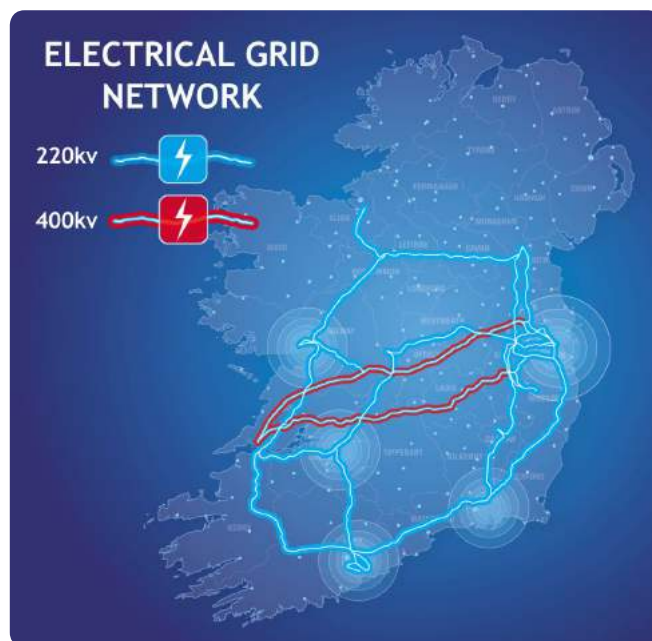
MAP 9: Overseas Visitors

The region is currently reasonably served by the national gas network however there remain considerable challenges to improving the electricity network, particularly if renewable energy is to become a national asset over the coming decades as the potential of the region is delivered.

Furthermore the region itself is very exposed to potential security of supply in the absence of a transmission network necessary to ensure supply into existing and future energy customers such as the very advanced manufacturing sectors and clusters across the entire region.

Energy has been identified as an opportunity across all LECP's, within the region, ranging from energy efficiency first, harnessing the energy resource through through those low carbon energy sources within the northern and western region, infrastructure development and the development of associated innovative technology. These are all significant areas of activity that have the potential to deliver climate change/ low carbon solutions for Ireland and importantly improve the economic, social and economic well-being of communities.

The transition will require a cultural step change in the approach to Green Energy Development and provides an opportunity to create sustainable communities by the region also becoming a net exporter of Green Energy. Within the Irish economic context, significant investment in Renewable Energy in the region will contribute to Ireland complying with the EU Commission roadmap targets and potentially becoming a net exporter of energy.



MAP 10: Electrical Grid Network

Energy Efficiency First

The Energy Efficiency First focuses on the efficient use of Energy and the reduction of waste and involves actions and benefits in the following areas: (IEA).



The Region will work with National Agencies such as SEAI to implement initiatives to improve Energy Efficiency in All Sectors. Existing County Council Planning Policies will be reviewed to encourage the transition to Passive Buildings, thereby reducing domestic energy consumption.

Low Carbon Energy Sources

The Northern and Western Region is capable of being a net exporter of Low Carbon Energy Sources to the rest of Ireland and Europe. The existing and planned investments in Wind Energy Generation Capacity in the region combined with the production of Natural Gas in Mayo are significant contributors to the National Green Energy Mix. There are a number of constraints / actions required to achieve the vision of increased development the Low Carbon Energy Sources which include :

- The Roll Out of the National Smart Grid Plan (enabling new connections / grid balancing / energy management / micro grid development etc).
- The development of a National Interconnector (Sub sea Ring around Ireland (provides connection to EU via the proposed Celtic Interconnector)) or other solutions to connect the North Western Region (including the Marine Area (AMETS Site and other Marine Energy Zones) to the EU Grid System.

The development of both of the above infrastructural investments would enable the development of:

- Offshore (Probably Deep Sea Floating) Wind Development.
- Offshore Wave Energy Development.
- Connection of New Smaller Onshore Wind Farms.
- Connection of other variable renewable Energy Sources.

The Region also has capacity to develop new and innovative solutions in the areas of Biomass (EG. Sligo IT/Seaweed), Biofuels etc.

Innovation and Integration

Climate Change, Technology and Legislation are the main driving forces in the Energy Sector. The future of energy generation, energy distribution and energy use will be governed by these factors. Existing Innovation in Energy Generation (such as the significantly reduced costs in PV Installation) and storage technology (e.g. Tesla Powerwall), Heat Pumps etc. could have a transformative effect on individual homes (in that each individual home can produce 100% of its own energy) and this could be scaled to renew our towns and villages by the development of Microgrids, Local Energy Co Ops (using renewable energy sources and microgeneration). The operations and management of these local systems could provide local high tech job opportunities and also create innovation opportunities for local SMEs in the technologies surrounding power management, grid balancing etc.

The region also has an opportunity to improve the use of renewable energy in the transport sector. The adoption of electric vehicles technologies is likely to impact at the consumer level but the potential development of an integrated Hydrogen Powered Public Transport System (as piloted in Aberdeen) by adopting Hydrogen Fuel Cell Buses and an Electrolysis system. This would be an effective response to the generation of excess wind power. It is proposed to evaluate the feasibility of creating an innovative Hydrogen Highway along the N17 from Derry to Limerick.

Building the Renewable Energy Production Sector

The development of the Wind Farms and other Renewable Energy Production sources has met with a significant societal negative response. To increase the penetration of Wind and other Technologies, it would be appropriate for the NPF to take a "Communities First" approach to any further development in this sector in the Region. This would mean that the Wind Developer would provide a significant shareholding to

the host community in any future Wind Farm Developments and the Communities would be encouraged to develop their own Wind Farms by easing access to Grid Connections and Financial Tools to all Community owned Wind or Renewable Energy facilities. This should also be the approach taken to Offshore Wind / Wave that affects Fishing and other Marine based communities. It is anticipated that this approach will enable increased penetration of Wind and Wave Farms in the region and it would be consistent with. The NESC report in 2014 'Wind Energy in Ireland: Building Community Engagement and Social Support'.

The second approach to energy production and generation should be the development of Community/Town Owned Energy Systems that would generate, distribute and sell energy to its own community in the first instance. This could be done using microgrids, micro wind, microdigestors etc., town energy management systems, storage and technologies to manage the power. The deployment of Smart Grid can accelerate this approach, but the capacity of disruptive technologies to develop local grids (as is currently happening in the US) may enable communities to do this irrespective of the deployment of Smart Grid.

The most crucial element of Innovation and Integration of Renewable Energy is a cultural step change in the approach to energy within the population of the region. Current activities such as the development of Sustainable Energy Communities (currently being piloted in the Gaeltacht and other regions) shall enable communities to take an involved stakeholder approach to the cultural step change in the transition to the low carbon economy.

The perceived "Use" of communities, land and sea assets to build the Renewable Energy Sector and generate economic benefit to external actors is a core cultural issue to be addressed. This is a deep seated cultural issue that can only be addressed by a stakeholder approach and the delivery of economic benefits to the host communities. The alternative approach

has resulted in the addition of significant cost, political challenges and community resistance in the development of significant Energy Projects in Ireland over the last decade and the NPF must provide the lead in setting out the roadmap.

The main enabler of the development of the Renewable Energy Generation Sector is access to Capital and access to Markets. With the possibility of Ireland being the only physical access point for the EU to the energy (and other natural resources) of the North Atlantic the Strategic Development of an Electrical Interconnector to the European Market is a key strategic requirement to unlock the green energy capacity of the region.

The Region will work with existing actors in the Access to Capital to develop a Fast Track Route to Green Energy Developmental Capital for business and communities that are increasing the capacity of Renewable Energy Production. Knowledge Centres in Green Energy Financing and Renewable Energy Technologies including Environmental and Power sectors being developed in Letterkenny, Sligo and Castlebar IT Institutes and promoted within this region.

Our region can become an exemplar for addressing climate change, unleashing future opportunities through a co-ordinated approach to supply chain development across all renewable energy sectors, to maximise economic output and provide for innovative renewable energy solutions for businesses and communities, together with the adoption of energy efficient technology. Other objective is to include energy efficiency actions, measures to change attitude in relation to energy use, to extend the Corrib Gasline to Sligo and to utilise the potential for economic development in the Energy and Green Economy sector so that our region becomes an exemplar for addressing Climate Change. This could all be achieved through the establishment of a National Energy research centre and the continued development of appropriate training and capacity building in renewable energy technologies by the ETB's and 3rd level education sector. The region boasts significant

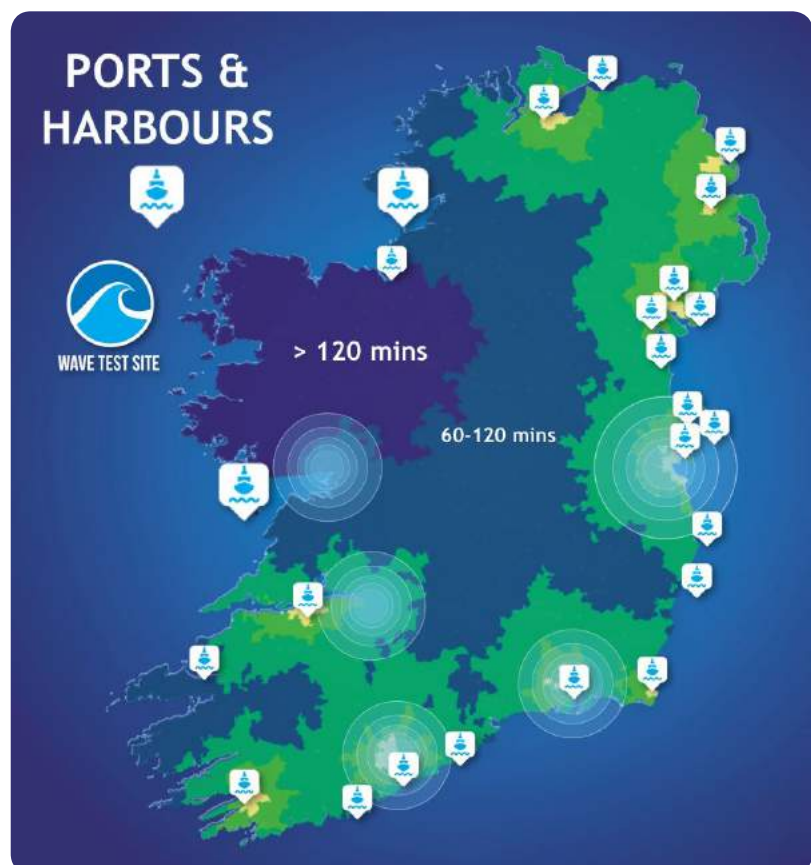
ongoing research and development in respect of harnessing the significant ocean energy potential in our region, including wave, offshore wind, and tidal energy testing of prototypes along our western shores including;

- i. The Atlantic Marine Energy Test Site (AMETS) off the coast of Belmullet, Co. Mayo is being developed by Sustainable Energy Authority of Ireland (SEAI) to facilitate testing of full scale wave energy converters in an open ocean environment.
- ii. The Marine Institute is collaborating with SEAI, MaREI (UCC) and SmartBay Ireland to develop a national test and demonstration facility for marine energy and technology at the 1/4-scale ocean energy test site, in north Galway Bay, near Spiddal.
- iii. The Sustainable Energy Authority of Ireland (SEAI) has awarded funding to ORPC Ireland for conducting a feasibility assessment to identify tidal energy development opportunities in the coastal waters of County Donegal.

3.9 Marine

In 2012 the Irish Government launched an Integrated Marine Plan for Ireland entitled 'Harnessing Our Ocean Wealth', which provides a strategic framework to realise the potential of the sector across Ireland's marine territory, which extends far beyond our coastline up to 220 million acres (approx. 880,000km²) an area more than 10 times our land mass. Our location places (see map below) provides the region with a significant strategic value proposition for the development of our ocean resources.

The region can benefit from the potential of key assets such as Killybegs Fishing Port, the BIM Maritime Educational Facility at Greencastle and other key Infrastructural assets such as Galway Port and facilities along the North Mayo coastline for example. This can be developed in tandem with the opportunities presented by the Wild Atlantic Way Tourism Strategy, adding economic value to sub sectors such as Cruise Tourism, Marine Food and Nautical Tourism and



MAP 12: Ports and Harbours



MAP 13: Ireland's Marine Territory & the NWRA Region The Real Map of Ireland

Marine Heritage development. The Region has also significant potential to grow and upscale the number of enterprises in the Marine Biotechnology/ Seaweed extract area.

In order to develop this opportunity it will be necessary to develop critical infrastructure. The Region is currently underserved by commercial port facilities and is dependent upon access into Dublin principally but also other ports in Waterford and Belfast for moving freight. In terms of fishery ports the region is reasonably catered for though recent developments in both Killybegs and Ros a

Mhil with many smaller harbours under the control of the local authorities providing local based fishing services. Galway Port currently is severely restricted and a strategic plan has been proposed by the Harbour Authority which provides a vital centre in the cruise network up to Killybegs and further afield. Sligo Port remains severely restricted with limited investment in recent years. Further investment needs to be provided to harness the potential of our marine resources and to maintain and grow our coastal communities.

The Regional Economy in 2017

To set the scene for the regions vibrant startup ecosystem, one needs to appreciate the geographic, cultural and business landscape. 8 counties, 1 city, 2 internal commercial airports, 140 FDI multinationals (employing 26,000), population of over 1.2 million citizens (including catchments), thousands of enterprises and hundreds of communities. Each of the critical centres is discussed below to provide an overview of the capacity of the region to underpin future effective regional development on the island.

Regional Economy

The region boasts over 140 FDI multinationals supported by the IDA employing over 26,000 people. Our top 15 multinational companies from our rural areas in 2016 exported over €10bn worth of product and services.

The region has historically been perceived as a peripheral region but this has made the region more resilient and an attractor to a broad range of industries. The regions talent pool supported by our 3rd level offering and education providers deliver world-class graduates. With over 60,000 students studying within the region and an



increasing number choosing entrepreneurship as a career, the region needs to understand the proposition of its talent better.

Example

One of the worlds largest software development companies chose to locate its facility outside Letterkenny. Pramerica employs nearly 1,000 people directly and operates globally from this region. Sourcing talent from both sides of the border the company is the epitome of the 4th industrial revolution proving that talent is key, not distance.

This has been assisted by the availability of active mentoring through the work of Enterprise Ireland and the Local Authorities Local Enterprise Offices and through the availability of technical infrastructure in urban areas. The region enjoys a healthy start-up culture and has built up supporting legal and policy infrastructure. Through diversification from primary industries the region surpasses the level of entrepreneurship found in Tel Aviv.

Example

With over 28 co-working spaces, incubation spaces and start up laboratories this region boasts the highest number of facilities per capita across Europe reinforcing its reputation as a vibrant entrepreneurial region.

4.1 Galway City Region

Galway is located approximately a two-hour drive (200 km) from the capital, Dublin. The population in the greater Galway hinterland exceeds 250,000 people, making it the State's third largest centre of population after Dublin and Cork. Complemented by other cultural experiences such as the Galway International Arts Festival, it is indicative of the standards of excellence that Galway strives for - recognised recently with the city's designation as the European Capital of Culture 2020.

Galway was named as the top microcity in Europe in 2014/2015 by the Financial Times fDi magazine (for cities less than 100,000 people), and the top microcity in Europe in 2016/2017 for both business friendliness and economic potential. Galway is also the world's friendliest city according to Travel & Leisure Magazine.

Foreign Direct Investment (FDI) has played a significant role in the development of Galway's business landscape, as facilitated by IDA Ireland. Since the 1960s, companies in sectors such as medtech and life sciences, ICT, food and engineering to include: Boston Scientific, Medtronic, Fidelity Investments, SAP, Cisco, Avaya, Aviva, Hewlett Packard Enterprise, Valeo Vision Systems and many more have operated successfully in Galway. The importance of this multinational base has also laid the foundations for the development of a vibrant indigenous sub-supply and logistics sector.

Galway is Ireland's medtech capital, with a third of Ireland's medtech workforce in one of Europe's, if not the world's, top medtech hubs, with a density of companies and medtech research institutes only rivalled by Minnesota. Just take a look at the Galway Tech Map and Galway Medtech Map and you'll get a good overview of the companies based in the city.

Galway's Startup Success Stories

There are 16,381 enterprises in Galway. Over 250 employ over 50 people, with the majority, 14,900, employing less than 10 people. Established international businesses which were founded and are headquartered in Galway include: Chanelle, Aerogen, Supermacs, JFC, CF Energy, and SSL Logistics. Other companies such as financial services firm Fintrax (sold for €170 million, and subsequently valued at €0.5 billion), fleet management leader Celtrak, and medical devices manufacturers Creganna (acquired for €821 million) and Creagh Medical (acquired for €30 million) were established in Galway before their multi-million euro acquisitions. Current international growth focused startup businesses include: Channel Mechanics, Game Golf, Altocloud, Nua Naturals, Hillwalk Tours, Solaris Tea, Ex Ordo, PiP Payments, OnePageCRM, VT Networks (based in DCU Alpha now), DiaNia Technologies, and Bluedrop Medical.

4.2 Letterkenny-Derry/Strabane City Region

Strategic Co-ordinated approach to maximise potential:

The vision for the North West City Region is one which releases significant economic potential and becomes a very strong contributor to the growth of the region. With a cross-border catchment of around 400,000 people, the North West region represents the fourth largest urban agglomeration on the island of Ireland and the only one of such scale to experience an international border within its functional hinterland. Whilst traditionally noted for its higher concentrations of lower value added industry, the retreat of traditional industries, higher levels of social disadvantage and weaker infrastructure relative to the east coast, the region is increasingly being characterised by flourishing growth within a diverse SME sector, and has a relatively strong record of successful foreign direct investment (FDI) and reinvestment. However, it is recognised in the region that its

growth potential cannot be effectively maximised without a strategic coordinated approach based on regional leadership in partnership with central government stakeholders. The process the Councils have animated since late 2014 represents an agenda-setting approach to such a new arrangement to foster economic growth and investment in conjunction with community cohesion, well-being and environmental sustainability.

The City Region covers an area of 2394 square miles with Letterkenny and Derry-Londonderry as its linked gateways acting as an effective focus of investment and growth. The North West City Region area is home to innovation, creativity and a talented workforce that has attracted major commercial and international successes to the region. With strengths in life sciences, business services, technology, advanced manufacturing and engineering the region is supported by the region's third level institutes and R&D institutions of excellence.

With 40,000 students in third level and further education in the region, the North West City Region is marked by a highly educated workforce, as a strategically important feature of a regional population of 400,000 people. The economic capacity of an area, arguably making up the 4th largest city region on the island, is a key indicator of economic potential.

Cross Border Trade:

The North West City Region has almost 15,000 active businesses (2014) with 70% of this activity being in County Donegal. Agri-business is a significant sector accounting for around 30% of enterprise numbers with large shares present in commerce, tourism and construction. The total cross-border trade in goods came to just over €3billion with marked trade growth since 2010. Cross-border trade is a key component of the local economy and reflects a closer level of economic integration that elsewhere in the island. 38% of firms in Donegal and 34% of firms in the Derry City & Strabane District area are engaged in cross-border trade compared to 25% of the rest of the island.

FDI and 3rd Level linkages:

Foreign direct investment is a key economic element of economic growth in the North West City Region. In Donegal 1336 jobs were added by agency-supported foreign owned firms between 2006 and 2015 constituting an increase to 3,591 jobs, with 69% of the positions created in internationally traded services, notably in Letterkenny.

Emerging growth sectors include digital media/software, clinical life sciences, and creative industries such as film, health technologies and tourism. The demand for talented staff for these services is being met by the third level institutes proactively working to meet the needs of industry - now and in the future. Ongoing and proposed investment in education and science is contributing to the region's reputation as a strong knowledge economy demonstrating research excellence with a talented graduate pool viz Ulster University, Letterkenny Institute of Technology, North West Regional College and, indeed, South West College (Omagh Campus).

Alignment of Local & Regional Government to focus investment & co-ordinate policy:

An opportunity has been created, through the alignment of Local Government functions in a place-based leadership model, for a new arrangement which allows central government to coordinate its resource planning and spending as they relate to the region - leading to a corresponding impact on the region's growth potential and optimal value for money as regards investment in both jurisdictions.

To proactively influence the North West region's economic future the region must work smarter and be more focused and agile. Such an approach does not only enjoy widespread political and civic support but also the backing of central/regional government across the island. Councils in the North West confirm that they are ready to respond operationally to this opportunity to establish new, more interconnective working arrangements for collaborative development of the region into the future, and to optimise the economic and social potential of the new arrangements. This regional collaboration is committed to not only leading and delivering on economic, environmental and social well-being and regeneration in their respective areas but for the North West region as a whole.

Over the past decade, the economy of the region has shifted away from the traditional industries of construction and manufacturing towards a knowledge economy. Central to this is a strong communications/ access network which is starting to emerge in the region - from Project Kelvin through to recent investment in the City of Derry Airport, Donegal Airport, and the Port of Killybegs. Project Kelvin, for example, ensures parts of the region have access to a world-class telecommunications infrastructure. To continue to foster economic conditions conducive to both indigenous enterprises and FDI the continued investment in digital connectivity is of vital importance.

The North West City Region is one with considerable potential and a diverse range of assets that can be harnessed. To continue to be an attractive and competitive economic region, a coordinated, strategic focus on the drivers of Regional Economic Growth and Investment, Physical and Environmental Development, and Social Cohesion and Well-being, are critical as an effective approach to regional development in the national interest.

4.3 Sligo City Region

Sligo offers a perfect mix of skills, infrastructure and natural resources. Known globally as the outdoor adventure capital, the county offers all the traits associated with the 'future of jobs' - services, telecommunications and lifestyle. Sligo's Atlantic coast is a haven for startups and creative freelancers looking to escape the city and achieve the perfect work/life balance.

Sligo's roaring waves and bustling arts scene make for an atmosphere that fosters creativity and entrepreneurship. Ireland's 'Adventure Capital' draws a dynamic mix of people escaping the city. Sligo has a number of high-profile indigenous companies making waves in the startup sector. There's the elite sports data firm Orreco that recently announced a ground-breaking partnership with the IBM Watson; equine biomarker company Stablelab and email-marketing company Infacta. The community is also bolstered by the presence of multinational technology companies like Overstock.com.

In terms of creative businesses, Sligo is on the crest of a creative wave with a surge of homegrown and imported talent. No longer a sleepy coastal county, Sligo is host to creatives in a range of industries, including music, photography and film. Perhaps there's something about the stunning Sligo landscape that boosts creativity. It certainly makes an impressive backdrop, serving as a shooting location for the likes of Jimmy's Hall and Calvary.

Sligo in Focus

Epitomizing the start-up ecosystem in Sligo is the incredibly adventurous development of the BUILDING BLOCK in the centre of Sligo. With stunning river views and over 20,000 square feet over four floors, this destination location will offer the full suite of working solutions, from hot-desking and dedicated desks in co-working spaces, to private office suites, with high-spec meeting rooms and event areas to full-floor occupancy. All floors will be serviced with lightning-fast fibre-optic broadband (1,000mb) servicing nearly 40 local start-ups.



The Innovation Centre in IT Sligo currently houses 35+ new businesses employing over 100 people. Business sectors include software development, chemical and environmental analysis, biotechnology, health food development and e-learning and web design.

This visually stunning region is a tourist-friendly destination, centred around the dramatic backdrop of Benbulbin, glimmering beaches, rolling green hills, and magical woodlands, with unsurpassed leisure activities. Its success in tourism is only matched by its ability to secure global investment and sustain it. Perched in the North West, within a 60km radius, Sligo has a population of over 250,000 people.

Foreign Direct Investment

Foreign Direct Investment (FDI) has played a significant role in the growth of Sligo's business landscape, as facilitated by IDA Ireland. It is a thriving hub of activity with a burgeoning hub of multinationals that include Abbot, Abbvie, Braun, Brusa, Overstock, GSK and Amcor. Most importantly Sligo boasts one of Ireland's most strategic FDI sites in Finisklin. 131 acres of international standard 'investment ready' infrastructure. Sligo is in close proximity to three international airports and also has its own

regional airport. Ireland West International Airport is 20 minutes away from the centre of Sligo and 40 minutes away from the centre of London.

Clear emerging sectors identified by this review for Sligo include employment mainly in advanced manufacturing, tourism and leisure, agriculture and manufacturing, with a particular emphasis on food, marine, healthcare, financial services and the energy sectors.

4.4 Mayo - At the heart of the Wild Atlantic Way and advanced manufacturing in Ireland

County Mayo over the past decade has confronted many challenges arising from emigration and rural depopulation. Nonetheless the County is at the heart of a now successful rail freight business developed out of an ever expanding advanced manufacturing sector. Its indigenous sector is also expanding in areas such as artisan foods, light engineering and machinery. At the same time the County is the centre of the Wild Atlantic Way and is host to Ireland's wildest region. A vibrant cultural sector alongside the development of the County as the Walking and Cycling Capital of Ireland has underpinned the expansion of the tourism sector. There is the considerable potential of the marine environment while the efibre link out of Killala and along the Corrib Gas Pipeline means that the County is set to benefit from further investment in the ICT Sector.

Ireland West International Airport near Knock is Ireland's 4th largest airport and has the space to grow further, particularly if SDZ designation is made available to lands in the Airport environs.

Mayo has also been to the forefront of developing its relationships with the Mayo Diaspora and now has several long-term initiatives which are enabling SMEs based along the West Coast Generally to enter into markets in the United States and the United Kingdom.

Mayo in Focus

The Council has put in place a wide ranging policy framework to underpin the future development of the County. Working with strategic Partners such as the Mayo Industry Group, the IDA, Enterprise Ireland, Udarás na Gaeltachta and Failte Ireland the County has adopted the first Foreign Direct Investment Strategy at county level in Ireland. It has in place other strategies in renewable energy, digital economy, and local food, to name but a few, while the establishment of the Mayo Economic Development Office is playing a central role in building the international profile of the County.

The County is reasonably served by passenger rail services into Westport and Ballina, while the County is one of the largest contributors to a newly vibrant national rail freight market. Inter- city bus services also meet the needs of the larger towns and many of the smaller towns around the county but these are at risk due to re-configuration in Bus Éireann. Rural public transport is however very limited.

Broadband and 4G telecomms remain a work in progress with parts of the County having access to ICT networks on a par with the best in the Country while much of rural Mayo is waiting with increasing impatience for the roll out of the National Broadband Plan.

Population in the County has fallen over the last two census, indicating the impact of immigration from the County to the United States and Australia. This has had a severe impact on the working age population notwithstanding the success of advanced manufacturing and other economic contributors to the County. Ageing in the County along with rural isolation are challenges which have to be confronted along with the need to revitalise towns and villages which in their own right have considerable potential and capacity to grow and to become a feature in the already high quality of life of the County. Mayo has already proven that it has the wherewithal to do so with examples ranging from Westport and Mulranney to Claremorris and Bohola.

Manufacturing Investment

As noted above Mayo is one of the leading centres for advanced manufacturing in Ireland and has a number of world leading international companies alongside hugely successful indigenous companies. 100% of the world supply of botox is manufactured in Westport by Allergan in a facility which is subject to constant re-investment while the Coca Cola manufactures much of the world leading product in Ballina. Baxter is the second largest exporter of liquid based product from its facilities in Mayo, second only to Diageo in Dublin. Lionbridge is a leading supplier to all the world leaders in ICT while Hollister is a world leading Med Tech Company.

In the indigenous Sector McHale export their machinery across the Globe while Pel is a world leading company in the manufacture of waste reduction equipment.

Tourism

The Tourism Sector is one of the most important in Ireland, albeit that visitor numbers have some way to grow before hitting a similar level to those in Kerry for example. Nonetheless the County has seen considerable investment from international hotel groups as well as local investors, most notably the recent investment in Westport House by the Hughes Family, from the International Sportswear Company headquartered in Westport. The expansion of the Great Western Greenway is now considered one of the most strategic investments in local tourism product and has become a best practice template for similar initiatives across the State and internationally. The Mayo coastline, islands and ancient/historical sites are key attractors for the County while the angling holiday sector is vital to towns like Ballinrobe, and the Religious/Spiritual tourism sector is a considerable asset to the county, with Knock Shrine being the leading religious tourism destination in Ireland and Western Europe.

Agri-food

This sector is the second most important part of the local economy after advanced manufacturing in Mayo. Over 13,600 farms support on farm employment and a further 1,800 in food processing. The County is one of the Country's largest producers of forestry while there is a small but growing aqua food sector on the coastline. Exports from the County amount to €370 million.

Key Challenges

There is acknowledgement that the completion of the M17 north of Tuam will ease access to a large degree into Galway and onto Shannon and Limerick. However east links into Dublin and across to Sligo remain well below international standard and are a matter of considerable concern to all of the members of the Mayo Industry Group and others, all of whom make a contribution to national GDP well in excess of other counties. The value of those exports travelling the N5 will need to be fully considered in the preparation of the NPF and significant improvements to the N5 needs to be a priority from Westport, through Roscommon to Longford.

The need for the long term to protect the rail alignments from Galway to Sligo is also critical. As freight develops and with the potential impact of Brexit on the existing key export ports on the island the County needs to retain options for re-configuring freight movements out of other developing ports such as Shannon/Foynes and Galway while in the longer term there may be a case for a Tier 1 Port in the Region.

As noted above patchy broadband remains a critical concern which it is hoped will be resolved by the National Plan over the next four years while the need to establish a Connacht Ulster technological University is also seen as a key initiative as industry and the economy generally transitions over the coming decade.

4.5 Athlone and Environs Catchment

Athlone, with a population base of over 20,000 in census 2011, is partially within County Roscommon and it has significant reach into Co. Roscommon and into the eastern area of Co. Galway. It also reaches into parts of Longford, Offaly and is a key industry and administrative centre within Co. Westmeath itself.

The NSS identified Athlone, Mullingar and Tullamore as a linked Gateway. However, the Expert Group's review of the NSS, appointed by the government in 2014, recommended that its successor should focus upon spatial development issues and choices that are genuinely national in scale, and recognised Athlone as a suitable Gateway in the Midlands. It is acknowledged that Athlone does not currently have the same critical mass as other significant city regions but its current role, accessibility, availability of infrastructure and function in the region as an economic driver in this catchment does support the recognition given by the Expert Group.

Athlone in focus

Athlone has developed as a principal service and employment centre for County Roscommon and the surrounding catchment, providing for a wider range of higher comparison goods, health care and higher education opportunities. It is serviced by the inter-city rail line Dublin/Westport/Ballina and it is connected to the regional towns of Sligo, Castlebar, Mullingar, Tullamore and Ballinasloe, with easy access also available to the main urban centres of Dublin and Galway via the M6 motorway network. Athlone has access to the Natural Gas pipe allowing for cost effective energy. Hi-speed Fibre-Optic Broadband infrastructure is available through the Metropolitan Area Network (MAN) Athlone.

Athlone and environs catchment is advantageously positioned in relation to international airports, such as Knock International Airport, Dublin, and Shannon, as well as to Galway and Shannon/Foynes Port.

Other attributes of the catchment include but is not limited to the following:

- Athlone Institute of Technology (AIT) currently has 5,313 students engaged in undergraduate and postgraduate programmes and hosts two Technology Gateways and the Midlands Innovation and Research Centre (MIRC). The Institute also has three strategic research institutes in Materials (MRI), Biosciences (BRI) and Software (SRI). The Institute's Centre for Industrial Services and Design (CISD) specialises in Engineering and Design services including rapid prototyping (product design, 3D printing, additive manufacturing). It also has collaborative platforms with local industry, providing access to its Analytical Laboratories for research and development purposes.
- Within County Roscommon, the catchment includes the Roscommon/Athlone corridor, which develops along the meandering River Shannon and along the artery of the N61, which embeds the most economically active area within the Roscommon.
- IDA Ireland's Midland office is located in Athlone.
- 40 hectare Athlone Business & Technology Park available with direct access to the M6 and M4 motorway to Dublin. It offers accommodation for both manufacturing and international services clients. The park has greenfield areas for future development. The IDA has just completed a new Advanced Technology Building in the park of c. 2,674m², part two storey and part double-height single storey. Athlone is also earmarked for a further property investment in 2017 by IDA.
- In 2013, Athlone was designated the European Town of Sport.
- The town held the European Triathlon Championships in 2010.
- Connectivity with other regions, particularly the East and Mid-East, its proximity to the capital city, and a critical mass of almost half a million people within one hour's drive.

Enterprise and Industry

The Athlone and Environs catchment includes the town of Roscommon, which is the county town. It occupies a central location for the county's commercial services including Local Authority, ETB, HSE & University Hospital and the decentralised Property Registration Authority Office.

It hosts a 20 acre IDA Business and Technology Park as well as many Greenfield sites and Industrial Units owned by Roscommon County Council, with IDA supported companies such as Advanced Couplings Ltd, System Labels, Innocoll Pharmaceuticals and Carson Industries located within the environs of the Town.

Monksland Industrial Park offers extensive facilities upon its 40-hectare site, with associated car parking, site services, landscaping and related works located. It is home to a number of Pharmaceutical companies including Alkermes, Athlone Pharmaceuticals, Alexion and Jazz. There is a growing presence of the medtech/pharma sector through-out the county and the 2017 Actions Plan for jobs proposes the development of the industrial zone of Monksland as a biopharma/medtech hub to include the development of a seven-unit incubator hub, to facilitate this growth. While investment in specialist infrastructure and resources will foster and facilitate growth in knowledge sectors (e.g. ICT, Medtech, Value-value Food, Green business etc), through 3rd level Institutes such as Athlone IT, GMIT and NUIG.

Agri-food

The Agric-food industry continues to support thousands of jobs in the rural economy of this catchment, both directly in food & drink processing and also in the wider agri-industry. The value of Agricultural Exports arising from

the agricultural output in county Roscommon itself was €220m in 2016 (IFA). The Kepak factory located in Athleague processes beef for national and international markets and employs over 200 people, serving beef producers of Roscommon, while their lamb processing plant is located eastwards in county Longford and serves the counties large number of sheep producers.

Tourism

The proximity of the corridor along the River Shannon and Lough Ree, places the area central to the development of the Lakeland's and Shannon Blueway region. This stretch of the Shannon provides navigable access for the visiting tourist from the Shannon estuary through the mid counties up to Leitrim and onto Fermanagh. This opportunity could be further developed through the redevelopment of the Ulster Canal via Counties Cavan and Monaghan and also through the development of linkages back to the Atlantic Ocean via Ballyshannon, in County Donegal. The Upper Shannon Erne Future Economy project (USEFE) may be an appropriate platform to develop this opportunity.

Development potential

The positioning of the Athlone Catchment as a strategic central area has the capacity to capture the potential of this region and to cater for spillover potential from industrialised urban areas such as Galway, Dublin and Limerick, offering large opportunities and potential for both industry and population settlements as a result. This shall require ongoing collaboration to be further developed with all relevant stakeholders, including Local authorities, State Agencies and the education sector.

4.6 CAVAN / MONAGHAN REGION

The Cavan/Monaghan catchment encompasses both counties and extends into the border counties of Fermanagh, Tyrone, Armagh and Down, in Northern Ireland and eastwards into County Louth and partially into Meath, Westmeath and north Leitrim. The catchment reach includes the M1 economic corridor midway between Dublin and Belfast, which is home to a growing hub of multinational and indigenous companies centered around Dundalk and Drogheda and it also experiences the benefits of being located within reach of the greater Dublin area.

Cavan/Monaghan in focus

The Cavan / Monaghan sub region is centred upon the 2 main urban centre's of Cavan Town and Monaghan Town, both of which have the potential to grow and expand as regional economic drivers. Cavan Institute of Further Education and the Monaghan Institute of Further Education provide a variety of further education programmes offering full and part time, blended and distance learning opportunities to people living and working in the region. In addition access to third level education opportunities is provided in the region by Dundalk Institute of Technology. Other nearby 3rd Level facilities adjacent to the region include the Dublin Universities and Third Level facilities in Northern Ireland which are accessible to students in the Region, including Queens University Belfast, NI Colleges of Further Education, for example, Enniskillen. Dundalk Institute of Technology strives to be a regional centre of excellence in the Agri-food area and in collaboration with Teagasc Ballyhaise Agricultural College provide progression opportunities for all students in the North East area thus contributing to the economic development of the Region's agri-food sector.

The education sector provides significant support to the agri-food sector, with this region being renowned as a major agricultural powerhouse within the northern half of the country, with over 11,000 farms throughout the 2 counties, and with a well established and growing agri-food, including pig, poultry and the dairy production sector. The value of the combined agricultural output when combining Cavan / Monaghan is approximately €650m per annum (Source; IFA). The prospect of Brexit looming on the horizon over the coming 24 – 36 months will be the most significant issue in recent times to impact upon the region, its cross border ties (socio), and its indigenous business (economic), whether in agri-food or across other sectors.

In addition to a critical leaning on their agricultural strengths, there have in more recent years been strong growth performance in other area's, such as precision engineering, and renewable energy technologies. South and East County Cavan has now established strong links with the Greater Dublin Area, whilst Monaghan has ties with Armagh, and Louth, including the major urban centre's of Dundalk & Drogheda.

The economy of this catchment, while historically dependent on the agricultural sector, now also enjoys a strong presence in the industrial, enterprise and services sector. The strategic location of the county in the centre of the border region and neighbouring Northern Ireland, within close proximity to Dublin and the Eastern economic corridor, along the M-1 between Belfast & Dublin is stated as making it an attractive location for investment. Good potential transport linkages within the border, to Northern Ireland and nationally creates an environment which is considered ideal for future investment and job creation. This location and supports available to industry, such as linkages to the education sector, IDA, EI and the supportive Local Authorities (LEO) have assisted a number of very successful indigenous firms based in the region, such as Combilift, Silver Hill Foods, Greenfield Foods, Lakeland Dairies and Kingspan, to mention but a few.

Foreign Direct Investment

In Monaghan the IDA has a 12 hectare park, the Monaghan Business & Technology Park, located on the N12 National Primary Route east of Monaghan Town, with good accessibility to Dublin via the M1 and Dublin Airport just 125km away. The IDA have another 15 hectare park, the Cavan Business & Technology Park. It has direct access to the N3, National Primary Route and accessibility via the M3 motorway that connects the town to Dublin. Both of these Business Parks are landscaped to a high standard and have services infrastructure to suit the needs of both manufacturing and international services sectors. The Parks have property designs and greenfield sites available to suit all sectors.

The catchment is not serviced by rail and therefore road freight is the sole means of moving goods and services. Accordingly, there are several critical priority infrastructure projects, which would enable the region to grow as an attractive destination for inward investment, and simultaneously allowing existing firms the opportunity to improve competitiveness and upscale:

- Advancement of the N2 / A5 link through Monaghan to the Border, linking to Derry / Letterkenny.
- The upgrade of the N3 from the M3 to Cavan Town, including the by-passing of Virginia.
- The consideration of the advancement of the East-West Link, linking Dundalk to Sligo, via Carrickmacross, Shercock, Cootehill, and potentially via Enniskillen and the N16.

Tourism

The catchment includes many natural assets. It is the source of Ireland's two longest rivers, the Shannon and the Erne, which have been connected to form the 300km Shannon- Erne waterway (Leitrim/Cavan/Fermanagh), one of the world's longest waterways. It also is home to the Marble Arch Caves Global Geopark (Cavan/Fermanagh), Ulster Canals (Fermanagh/Monaghan/ Armagh/ Tyrone) and the Cooley-Gullion-Mourne Mountain ranges

are located to the east within easy access. It has an abundance of lakes offering a range of water-sport activities while forest walks and sculpture parks are increasing in number. The Region, including cross border, also possesses some attractive and well regarded golf courses, including Slieve Russell (Cavan), County Louth Golf Club and Concra Wood Golf Club (Monaghan). This provides an abundance of economic opportunities and high quality of life available for residents and visitors.

The re-opening of the Ulster Canal is seen as a key strategic tourist initiative for the area. This project would have potential to link into the development of the Lakeland's and Shannon Blueway region, where the Shannon provides navigable access for the visiting tourist from the Shannon estuary through the mid counties up to Leitrim and into Fermanagh. This opportunity could be further developed through the redevelopment of the Ulster Canal via Counties Cavan and Monaghan and also through the development of linkages back to the Atlantic Ocean via Ballyshannon, in County Donegal. The Upper Shannon Erne Future Economy project (USEFE) may be an appropriate platform to develop this opportunity and would also integrate with the infamous Marble Arch Caves Global Geopark facility in this cross-border region.

Development potential

There are a number of areas where Cavan and Monaghan can potentially develop strong collaborative partnership's, and some of these are listed below:

- The restoration & reopening of the Ulster Canal through both Counties (commencing at Belturbet / Lough Erne Upper), and extending as far north as Moy (Lough Neagh) Co. Tyrone, in collaboration with the Upper Shannon Erne Future Economy project (USEFE), so as to maximise the potential of the development and promotion of Blueways.

- Third Level education: The repositioning and rebranding of Cavan Institute and Monaghan Institute of Further Education, considering the potential to develop as an Institute of Technology and working with other providers of third level education, including with the potential Connaught Ulster University of technology. Thus continuing to develop strategic partnerships, local and cross-border, to address gaps in access to third level accredited education and maximizing on provision of training necessary to support enterprise and economic development throughout the Region.
- Promote industrial clusters (e.g. food and agri business, building materials and e-commerce) to help create critical mass.
- Develop new and innovative visitor facilities and interpretation at the Marble Arch Caves Global Geopark, Cavan, which would benefit the wider region, including Fermanagh, and Monaghan.

4.7 Atlantic Economic Corridor

It is accepted that the future will be driven by and centred on productive urban centres working at the heart of effective city regions. The strategy of the NPF should be to identify the effective growth centres in each region and to prioritise the policies and investments which will enable them to flourish individually and also to collaborate effectively to form a real counterbalance to the established Greater Dublin Conglomerate.

The soon to be complete extension of the motorway network from Limerick to Mayo opens up the prospect of an innovative linear city with three key nodes delivering real critical mass.

The Atlantic Economic Corridor would link Limerick, Sligo and Letterkenny with a travel time of some two hours (between Limerick & Sligo) and would bring a population base of over a million into productive collaboration.

Completion of the motorway network to Sligo would unleash the potential of the entire region. This course of action will assist the current key economic driver of Galway City and enable the progression of the emerging northern growth driver of Letterkenny – Derry.

The assembly of critical mass in this manner and sequence will also support the growth of the secondary growth corridors in Mayo, Roscommon and Leitrim identified in the body of the report. These secondary corridors are crucially important at regional level and will be dealt with in the Regional Spatial and Economic Strategy which will follow on from the preparation and adoption of the National Framework.

Enabling the National Planning Framework in the Region

5

5.1 How the introduction of the NPF and RSES can make a difference

One of the critical success factors for the Region becoming a leading place to live and work, is the decision to adopt a National Planning Framework which subscribes to effective regional development and which fully acknowledges the reality of considerable economic disruption due to advances, which continue, in every aspect of the economy and society. The effective dispersal of non competing sectors such as public services, advanced manufacturing, food production and energy generation across the OECD has to be avoided in Ireland. The positioning of the Country through a combination of integrated policies at national level under the umbrella of the 2018-2040 National Planning Framework will therefore have to be underpinned by the specific approaches to regional development that are to be set out in the Regional Spatial and Economic Plans. Cementing Governments strategic viewpoint will be central if the alignment of policy and the Capital Investment Plan is to actually happen. For the first time this Capital Investment Plan should not just concentrate on past trends but identified potential.

In the case of the NWRA, this means the creation of a development focus on connecting the region internally through a combination of hard, and more significantly, soft infrastructure. Fostering a convergence that facilitates effective responsiveness determined locally and regional. Specific efforts to combine the disparate voices within the region into a unified regional platform

which will allow the necessary flexibility to confront the challenges of the 4th industrial revolution through existing capacities in the region from 2017.

Furthermore, and notwithstanding the impact of BREXIT in 2019, the Region is particularly relevant in building links into Northern Ireland which are important in sustaining the transition of the NI Economy into a successful self reliant economy. The cooperative arrangements to be set in train under the RSES and NPF are critical in providing the necessary space for political leaders in both jurisdictions to collaborate on matters ranging from international market access, industrial and pure research and advanced manufacturing.

The RSES will provide a critical space in which to determine the priorities for regional capital investment. It should allow both local and national policy-makers to take the necessary “helicopter” view to re-orientate long-standing but stand alone investment efforts that were a feature of the local authority led investment planning across the region prior to 2017. As a result critical large investment projects have to be advanced on a regional basis from 2018 to 2028 and doing so will position the region as a whole to benefit significantly from industrial transformation and public services re-configuration. Thinking in a regional context is not just a challenge for the local authorities. Arguably it is even more critical for national agencies such as Transport Infrastructure Ireland, the State Transport Companies and many others.

5.2 The role of the NWRA in implementation

The introduction of the regional assemblies under the Local Government Reform Act, 2014 is enabling the development of a regional focus on socio-economic development in the State. Following adoption of the Regional Spatial and Economic Strategy in 2018, the Assembly will have a range of supervisory and implementation responsibilities devolved from the Department of Housing, Planning, Community and Local Government, Departments of Finance and Public Expenditure and Reform.

The key role given to the Northern and Western Assembly will be that of driving through regional development priorities which should, if the NPF is to be a positive policy tool, be formally agreed between the Assembly and lead Departments in regard to the National Planning Framework. This should enable, for the first time, the full integration of local policies within local government and those at national level. The direction provided will focus on ensuring connectivity across the region and the development of the region's voice in both national and international policy development. This approach should be further underpinned through 2020 to 2025 to allow for delivery of region significant infrastructure such as regional hyper connectivity through the soon to be delivered Broadband system and 5th generation mobile telephony.

The adoption, as envisaged as far back as 2013 in Putting People First, of the RSES as a whole of government policy position could allow agencies at national level to bring their business planning in line with the catchment and cluster strategies to be set out in the RSES. Thus, for the first time, institutional arrangements at both local and national level could be re-configured on a regional basis allowing for national government to focus on national and international policy developments..

The on-going implementation of the RSES by the Assembly will require devolving greater financial responsibility with added oversight powers for local government, again as envisaged in Putting People First. The Assembly will act as the regional agent for the National Oversight and Audit Commission. It also, in its own right, will manage the renewed EU Programmes which are expected to continue with European Union support as a consequence of Brexit to 2024.

5.3 Reprioritisation of Funding

It is in the progress of the social, economic and socio-environmental conditions of the Region that must tangibly benefit from the development of the National Planning Framework and the Regional Spatial and Economic Strategy.

While the Region, in its previous guise as the Border Midland West Region, up to 2014 had achieved considerable progress in social development terms relative to all the then regions of the European Union, it will really be with the implementation of the policies under the NPF that the development gap between it and the other regions on the island of Ireland begin to close.

In broad terms by 2028 the region should, if effective regional development is to mean anything, have largely caught up with the rest of the island in terms of critical infrastructure including completion of the integrated transport networks outlined earlier to allow for ease of physical connection while the investment in broadband providing the necessary platform on which investment in hyper connectivity can be implemented in the period 2022 to 2024.

In a recent critical policy initiative of the Government, support for the renewal of the regions towns and villages has become an important response to the housing pressures in Greater Dublin and Cork due to the cost of housing and congestion /infrastructure deficiencies. This in turn will prove vital in the renewal of the public service due to advances

in robotics and artificial intelligence alongside the financial services shake out from Britain and its off shore islands as it departs London, Jersey, the Isle of Man, and Edinburgh.

The effect of using the latent capacity of the region to support the potential migration of over 25,000 highly paid personnel from the UK into Greater Dublin, Cork and Limerick/Ennis could provide a solid basis for on-going public expenditure due to the combined effects of both income taxation and corporate taxation. The freeing up of housing capacity in these urban centres by regeneration of vacant housing throughout the north west and west provides a realistic and affordable option. Doing so would underpin the potential of Dublin in particular, to attract internationally mobile investment arising from the re-configuration of financial services in the coming years.

5.4 Underpinning of NPF through inter-departmental oversight and policy integration

As highlighted in several reviews of the implementation of the National Spatial Strategy, implementation itself was the critical point where the Strategy did not deliver on expectations. The NSS was a starting point to applying a long term perspective to the future of Ireland. However, the failure to fully embed such strategic thinking into national policy development alongside the severe impact of the austerity necessitated for public expenditure management meant that many of the good ideas in the NSS did not come to fruition. In learning the lessons of the NSS it goes without saying that the forthcoming National Planning Framework must seek to implement a long term strategy which can be delivered regionally. Therefore, putting in place the necessary regional tools and processes to ensure successful implementation is a minimum requirement if the NPF is to equip Ireland to confront the transition period of the next two decades in particular.

This means empowering the regional layer alongside the local authorities to drive transition through their policy framework as will be set out in the RSES and subsequent county and city development plans. The existing Local Economic and Community Plans already reflect this approach. To do so will require a level of local to regional to national engagement not previously seen in the State. It will mean the instigation of compacts under which both local and regional government can implement actions over the medium to long term whereas traditionally these layers of government were either excluded or not resourced to deliver on national policy.

The institutional arrangements to give effect at local and regional level are now in place thanks to a progressive approach to local and regional planning. This now has to be underpinned by a similar approach at national level. Such will require a clear understanding of regional policy on the part of all Departments and decisions potentially coming from such departments must necessarily be considered in the context of their impact on the regions and their economies as well as social and cultural impact. This has been an extremely weak feature of the national policy context in Ireland, often demonstrated by decision-making which is short-term and highly impacting negatively on public services as well as creating long term negative legacies which ultimately have resulted in higher public service costs in order to correct the original short term decisions. The Region, only in recent weeks has seen press reports concerning proposals to close regional veterinary laboratories which adequately demonstrates the weakness currently, of regional policy and long term strategic thinking at national level. The Assembly recommends that all policy making at national level therefore be subject to both future proofing assessment and regional impact assessment as a normal feature of policy development.

Such approaches would mitigate against short-termism which bedevils the growth potential of all of Ireland's regions not to mention the actual impact on the daily lives of all of Ireland's peoples.

5.5 Underpinning of the NPF through the forthcoming and future national capital investment programmes

The NPF is a huge opportunity to address the many legacies of underdevelopment of the past across the State. It does so against the backdrop of considerable socio-economic change driven by external influences such as the 4th industrial revolution along with internal change such as the ageing of the population, the expansion of indigenous production and the shifts in the political dynamic across the island of Ireland.

Critical to a successful roll out of effective regional development, as noted generally throughout this Submission, is the alignment of Ireland's capital investment plans to the implementation of the NPF. Effective regional development will mean having to take tough decisions about the nature of the regions across the island and how each will interact with each other and the international arena on which the future of the entire economy is dependant.

If the NPF is to prove effective then active discrimination in the setting of priorities will be necessary. The question is whether such discrimination should be in favour of parts of the island which due to congestion etc are perceived as being in need of further investment to mitigate that existing congestion. Alternatively, whether

through thinking comprehensively about the future of work and life cycle habits of a growing and ageing population and an investment community more orientated towards quality of life, more is made of the larger capacity of lesser developed regions to provide the growth platforms which will be central to the future of the State?

Therefore, in the context of future growth, changes in the international socio-economic context and investment thinking based upon disruptive technologies, effective regional development will have to be underpinned by capital investment which as a minimum allows for the partial bridging if not full bridging of the development gaps across the State and to mitigate the legacy of the border that is to be compounded by the immediate and medium term impact of Brexit upon this region.

In addition, consideration of capital investment now has to be considered in the context of longer term investment expectations. Does the investment in a number of major ticket regional based infrastructures provide a greater capacity to grow opportunity for future generations or would taking a focus on a single dominant urban centre be a more realistic option?

International evidence and planning history in Ireland suggests that a more even relationship across the State would be the better option when it comes to capital planning.

Recommendations on the drafting of the NPF

6

The following recommendations are put forward for consideration by the Department as drafting of the NPF commences.

Effective Regional Development

Planning without clear acknowledgement of the impact of international transition into a new industrial era will mean that the regional and the State as a whole will not benefit from the potential which industrial and employment transition brings with the support of enhanced technologies. The future of work has to be central to the spatial planning within the NPF which, after all, is to address where and how people will work, be housed, recreate and use public services during a period of historically unprecedented change. It is with that in mind that the Assembly calls for the following to be put in place:

1. **The critical infrastructure set out in this submission.**

2. **The building of appropriate regularised data sets across the 3 regions in Ireland.**

3. **Provision of critical investment in education and industrial policy which are necessary to achieving effective regional development, most particularly the convergence of these sectors for real growth.**

4. **Direction of a clear focus at national level on implementation of the investment programmes.**

5. **Policies which apply a pro-active discrimination in favour of lesser developed areas.**

6. **Policy developments such as in health, education, employment, defence and security policy. The NPF has to be underpinned by a whole of government approach to implementation.**

Broadly these can be achieved if the following considerations are taken on board in drafting the NPF:

Spatial Considerations

1. The Assembly acknowledge and welcome the initiative to focus on building up the urban fabric of the State whilst also seeking to underpin the future of rural Ireland. This means for the region a focus in the forthcoming NPF on building up urban catchments to be of sufficient scale to underpin the region as a whole in economic, social, cultural and environmental matters, whilst embracing the populated living countryside that is a characteristic of this region's culture.

2. The Assembly has identified the three City Regions of Galway, Sligo and Letterkenny-Derry/Strabane as critical development areas for future population growth underpinned by a sustainable environment and economy, supported through a network of significant towns, villages and rural catchments. In addition, the Assembly support the continued development of Athlone as a service and employment centre, acting as a driver for the surrounding towns and its catchment, which includes the regional town of Roscommon. It also looks to underpin the growth of the two towns of Cavan and Monaghan, building on their cross border and city links to Belfast, Dublin and to the eastern corridor that links them.

3. Spatial concerns arising from Brexit and the impact of the 4th Industrial Revolution bring considerable opportunity but also huge challenges. The Region is likely to be the best positioned to sustain a spatial relationship with all of Northern Ireland in social, cultural, environmental and economic matters and therefore needs to be at the heart of engagement on spatial planning grounds with counterparts in Northern Ireland. Consideration should also be given to an interim review of the NPF upon completion of Brexit negotiations, so that issues arising can be addressed as necessary.

4. The Region, given its current quality of life and potential for renewable energy and sustainable food production, advanced manufacturing and capacity for provision of quality housing and education, provides the state with spatial competitive advantage in developing new catchment markets for Irish manufacturing and services across the OECD and further afield in Asia, Africa and South America. The NPF has to recognise that this is the case, and in doing so to ensure that investment directions to be outlined in the Framework are clear and robust to ensure those policy makers taking such decisions recognise this advantage.

5. Rural development requires a separate acknowledgement, as envisaged in the National Action Plan for Rural Development and will necessarily need to ensure that rural areas including towns and villages are acknowledged for the potential they have in delivering a good quality of life and opportunity which complements and supports development in larger urban centres.

Region Specific Applications

1. Implementation of the NPF must provide both direction to the Assembly in terms of effective regional development but must also allow for regional initiative based upon the strategic priorities of the Regional Assembly. At the heart of the regional approach is the ensuring of connectiveness within the region and externally into other regions and the international context. Recognition of this role must be fully recognised and secured to ensure that as the Assembly is dealing with various layers of government in the State, that its central role is fully appreciated across all layers and agencies of the State.

2. The introduction across all regions in the State of a bespoke funding platform to enable internal regional development as well as cross regional efforts should be undertaken to demonstrate the commitment of the State to regional development which is led at regional level. The Assembly would highlight that such efforts are a consistent feature of regional government within the OECD, including our nearest neighbour through initiatives such as the city deals of Scotland which have moved outwards to include city region thinking in the context of the city within a regional environment.

3. The implementation of the Regional Spatial and Economic Strategy is a welcome proposition and is seen by the Assembly as a critical platform on which to address long term regional disparities with the rest of the Country and to position the Region to take full advantage of what will be a hugely challenging environment in the next decade. Implementation must necessarily bring with it the responsibility to take ownership of this critical role and to have the flexibility to change as the operational environment of the region changes, in response to drivers which will range from local to regional to national and critically international transition.

4. A cross departmental approach to ensuring implementation of the NPF is a welcome approach which could be further developed through creation of a cross departmental group, focused on the cross policy application/whole of government application of policy focused on effective regional development in each Regional Assembly Area. Such a structure could be serviced by the Regional Assembly.

5. The creation of a futures focused expert group which would provide the necessary intelligence and knowledge of transition based processes in the wider international context, has to be a necessary initiative if futures thinking is to adequately inform the monitoring and evaluation of an NPF and underpinning Regional Spatial and Economic Strategy.

ANNEX A

Cavan	<p>Marcella Rudden (Cavan LEO)</p> <p>Nicholas O' Kane (Cavan Co Council)</p>
Donegal	<p>Eunan Quinn (Donegal Co Council)</p> <p>Liam Ward (Donegal Co Council)</p> <p>Michael Tunney (Donegal LEO)</p> <p>Paul Christy (Donegal Co Council)</p> <p>Sinead Harkin (Donegal Co Council)</p>
Galway	<p>Catherine McConnell (Galway Co Council)</p> <p>James Russell (Galway Co Council)</p> <p>Brendan Dunne (Galway Co Council)</p> <p>Valerie Loughnane-Moran (Galway Co Council)</p>
Galway City	<p>Helen Coleman (Galway City Council)</p>
Leitrim	<p>Bernard Greene (Leitrim Co Council)</p> <p>Joe Lowe (Leitrim LEO)</p> <p>Joseph Gilhooly (Leitrim Co Council)</p> <p>Nollaig Whyte (Leitrim Co Council)</p> <p>Terry McGovern (Leitrim Co Council)</p>
Mayo	<p>Iain Douglas (Mayo Co Council)</p> <p>John Magee (Mayo LEO)</p>
Monaghan	<p>John McEntegart (Monaghan LEO)</p> <p>Laura Nulty (Monaghan Co Council)</p> <p>Paul Clifford (Monaghan Co Council)</p> <p>Toirleach Gourley (Monaghan Co Council)</p>
Roscommon	<p>Louise Ward (Roscommon LEO)</p> <p>Mary Grier (Roscommon Co Council)</p> <p>Martin Lydon (Roscommon Co Council)</p>
Sligo	<p>Dorothy Clarke (Sligo Co Council)</p> <p>John Reilly (Sligo Co Council)</p> <p>Frank Moylan (Sligo Co Council)</p> <p>Mihaela Davidescu (Sligo Co Council)</p>

ANNEX A

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