



Implementing the NSS: Gateway Investment Priorities Study



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ABBREVIATIONS

BMW	BORDER, MIDLAND AND WESTERN REGION
BRD	BALANCED REGIONAL DEVELOPMENT
CASP	CORK AREA STRATEGIC PLAN
CCMA	CITY AND COUNTY MANAGERS' ASSOCIATION
CDB	CITY/COUNTY DEVELOPMENT BOARD
CEB	COUNTY ENTERPRISE BOARD
CSO	CENTRAL STATISTICS OFFICE
DED	DISTRICT ELECTORAL DIVISION
DoEHLG	DEPARTMENT OF THE ENVIRONMENT, HERITAGE AND LOCAL GOVERNMENT
DoES	DEPARTMENT OF EDUCATION AND SCIENCE
DoT	DEPARTMENT OF TRANSPORT
DSL	DIGITAL SUBSCRIBER LINE
EI	ENTERPRISE IRELAND
EPA	ENVIRONMENTAL PROTECTION AGENCY
ERDF	EUROPEAN REGIONAL DEVELOPMENT FUND
ESDP	EUROPEAN SPATIAL DEVELOPMENT PERSPECTIVE
ESPON	EUROPEAN SPATIAL PLANNING OBSERVATION NETWORK
ESRI	ECONOMIC AND SOCIAL RESEARCH INSTITUTE
EU	EUROPEAN UNION
FDI	FOREIGN DIRECT INVESTMENT
GDA	GREATER DUBLIN AREA
GNP	GROSS NATIONAL PRODUCT
GVA	GROSS VALUE ADDED
HEA	HIGHER EDUCATION AUTHORITY
HEI	HIGHER EDUCATION INSTITUTE
HERD	HIGHER EDUCATION RESEARCH AND DEVELOPMENT
HIE	HIGHLANDS AND ISLANDS ENTERPRISE
HSE	HEALTH SERVICE EXECUTIVE
ICLRD	INTERNATIONAL CENTRE FOR LOCAL AND REGIONAL DEVELOPMENT
ICT	INFORMATION AND COMMUNICATIONS TECHNOLOGY
IDA	IDA IRELAND
IoT	INSTITUTE OF TECHNOLOGY
LUTs	LAND USE AND TRANSPORTATION STUDY
MANs	METROPOLITAN AREA NETWORKS
MIU	MAJOR INTER URBAN (ROUTE)
MW	MEGA WATT
NDP	NATIONAL DEVELOPMENT PLAN
NRA	NATIONAL ROADS AUTHORITY
NSS	NATIONAL SPATIAL STRATEGY
NSRF	NATIONAL STRATEGIC REFERENCE FRAMEWORK
OPW	OFFICE OF PUBLIC WORKS
PACEC	PUBLIC AND CORPORATE ECONOMIC CONSULTANTS
PCP	PUBLIC CAPITAL PROGRAMME
PPP	PUBLIC PRIVATE PARTNERSHIP
QBC	QUALITY BUS CORRIDOR
R&D	RESEARCH AND DEVELOPMENT
RPG	REGIONAL PLANNING GUIDELINES
RTDI	RESEARCH, TECHNOLOGY DEVELOPMENT AND INNOVATION
RTI	RURAL TRANSPORT INITIATIVE
S&E	SOUTHERN AND EASTERN (REGION)
S&T	SCIENCE AND TECHNOLOGY
SFI	SCIENCE FOUNDATION IRELAND
SPC	STRATEGIC POLICY COMMITTEE
SME	SMALL AND MEDIUM ENTERPRISE
TSO	TRANSMISSION SYSTEM OPERATOR
UHI	UNIVERSITY OF THE HIGHLANDS AND ISLANDS (SCOTLAND)
VOIP	VOICE OVER INTERNET PROTOCOL
WIT	WATERFORD INSTITUTE OF TECHNOLOGY



Key Messages

- Strong cities and urban areas are key to growth of regional and national economies. Large urban areas tend to be where the various factors that drive modern economic growth assemble - an educated and skilled workforce, internationally trading firms, third-level institutions, R&D facilities, transport and other infrastructure, and culture, leisure and social facilities. In combination, these factors establish the type of basis essential for growth in the urban area itself, its wider region and the country as a whole.
- The concept of targeting strategically located large urban areas as leaders of growth for their wider regions is supported by international and national evidence, and has been firmly embedded in Government policy through the National Development Plan (NDP) 2000-06 and in the National Spatial Strategy (NSS). Both recognise that successful regions need successful urban centres or Gateways to lead their development. The NDP identified the five cities (Dublin, Cork, Waterford, Limerick and Galway) as established Gateways, and the NSS subsequently designated four additional Gateways (Letterkenny/Derry, Athlone/Mullingar/Tullamore, Dundalk and Sligo).
- Focusing on the Gateway concept in the NDP/NSS, the overall aim of this report is to provide renewed impetus to development of the nine Gateway locations by examining progress in their development, identifying the investment priorities critical to development of the Gateways and their regions and examining how investment in the Gateways can be better prioritised and co-ordinated at the national and local levels.
- Priority investment needs identified in the Gateways include the well-recognised sectors of economic infrastructure, enterprise development and research/innovation capacity. Other investment needs include improved social, amenity and cultural infrastructure and services, and investment in areas such as urban improvements and renewal. The report also highlights the fact that capacity to deliver a “package” of improvements across all these areas is central to successful Gateway development, including private sector confidence.
- There are many players involved in the development of Gateways – central and local government, enterprise development and other agencies, the private sector, and local communities. The study found that, notwithstanding much progress, not all the Gateways have the degree of shared objectives, vision, communication and co-ordination around planning and investment befitting their international, national and regional role. A more “joined up” approach is vital.
- We therefore conclude that a re-invigorated approach to development of the Gateways now needs the following actions:
 - (1) renewed commitment to investment prioritisation, both national and local, on the specific needs of the individual Gateway, and across the full range of their needs, with appropriately differentiated packages for each Gateway depending on requirements and stage of development;
 - (2) Improved co-ordination of the development efforts for each Gateway across the key public and private stakeholders nationally and locally, and between national and local levels.
- Such emphasis on Gateway development will ensure planned and co-ordinated delivery of the range of infrastructure required for dynamic and vibrant urban centres – a compelling proposition that will attract inward investment, stimulate the growth of dynamic indigenous companies, and be an attractive location in which to live and work. Successful Gateways throughout Ireland will then contribute to successful regions, and to the continuing success of the country as a whole.



Executive Summary

1. Background

Major cities play an increasingly crucial role in the development of competitive regions in modern knowledge-based economies. A UK study¹ found that the types of economic sectors that lead the growth of advanced economies are heavily concentrated in or near major cities and that the attractiveness of these cities has a major impact on the competitiveness of regional economies as a whole.

A cornerstone of the National Spatial Strategy – the Government’s framework for achieving more balanced regional development – is therefore development of nine large urban centres or networks of urban centres as “Gateways”. These Gateways² have been identified as fundamental to the economic development of the regions in which they are strategically positioned.

It is now over three years since the launch of the NSS in late 2002. While progress is being made in developing the Gateways it needs to be accelerated, and to be done in a more focused way if the Gateways are to realise their full potential as regional economic drivers.

Population growth nationally is now forecast by the CSO to be well above NSS projections, with an overall increase of 1m to a total of more than 5m by 2021 seen as a realistic prospect. A concerted spatial policy response is needed. Otherwise much of this growth will gravitate towards the Greater Dublin Area (GDA) and its outer fringes unless the other Gateways, supported by national policy, mobilise the plans, processes and resources needed for more ambitious levels of regional growth. The success of Dublin itself will also remain critical for the performance of the overall economy. However, its continued progress also cannot be taken for granted. Dublin needs to benefit from more effective spatial planning within the GDA, and transport investment as outlined in *TRANSPORT 21*, complemented by significant development of the other Gateways.

2. Study Objective

The overall objective of this study is to contribute to a renewed impetus in the implementation of the NSS and the overall Gateway approach. The report examines NSS implementation progress within the Gateways, it identifies key investment needs, and it proposes mechanisms through which these can feed into the new 2007-13 NDP and other national policies and programmes.

¹“Our Cities are Back”, Office of the Deputy Prime Minister of the UK, November 2004.

² Dublin, Cork, Limerick-Shannon, Galway, Waterford, Athlone/Tullamore/Mullingar, Sligo, Dundalk, Letterkenny/Derry.



3. Key Themes

The report concludes that a new action plan is needed to enhance all nine NSS-designated Gateways. The findings show that there are plans and strategies in place at national and local level, and that significant progress is already being made, especially in relation to infrastructure deficits. However, through the analysis of each Gateway, two recurring themes have been identified where the pace of development and implementation needs to be urgently increased:

- Improved investment prioritisation and funding availability in favour of the Gateways;
- Improved co-ordination of Gateway planning and investment within and between the local, regional and national levels.

4. Investment Prioritisation and Funding

Each of the Gateways face significant challenges in terms of funding the required scale of investment in areas such as urban renewal, non-national roads, cultural facilities and marketing and branding. Development of the Gateways therefore requires funding commitments, at both local and national levels, to deliver the prioritised investments identified in a focused and timely manner.

These concerns can be addressed as follows:

- The new 2007-13 NDP represents an historic opportunity to make the NSS a reality as the framework for regional investment and development. The next NDP should therefore contain a reaffirmation of the role of Gateways as the drivers of growth in their regions, and explicit commitment to meeting their prioritised investment needs;
- All relevant Government departments should consider the spatial context and importance of Gateways, when prioritising budgets over the coming years;
- Reasonable and transparent use of development levies and Development Contribution Schemes³ for investment in local infrastructure in the Gateways, taking account of local economic conditions, can complement national funding.

The proposal to focus on the development of the Gateways is not necessarily about more investment funds overall. It is about prioritising and making choices within existing and planned capital envelopes. This involves optimising the impact of expenditures through a shared and focused approach across government departments and agencies on the common understanding that investment in Gateways will deliver benefits to the wider regions and to Ireland as a whole.

³ Under Sections 48 and 49 of the Planning and Development Act 2000.



5. Co-ordinated Planning and Investment

Gateway development involves not just physical infrastructure, but also a range of inter-linked factors that make for a dynamic, vibrant and attractive urban location. These factors include the development of the overall physical environment, of the enterprise and economic base, labour force participation and skills, research and development, and cultural and recreational infrastructures. This requirement for a “packaged” approach presents significant challenges when stimulating planned and cohesive development of a Gateway across government departments, regional and local stakeholders.

Gateways in Ireland also contain a number of local authority areas, adding to the challenges and complexities of achieving a cohesive and co-ordinated approach and prioritising and implementing investments.

The development of the Gateways therefore requires clear and dynamic leadership and the co-ordination of a wide number of stakeholders at local, regional and national levels. These levels need to have a shared vision for the Gateway and agreement on what co-ordinated investments and other steps are needed to get there.

In summary this requires:

- The development of enhanced leadership, vision and co-ordination for the overall development of the Gateways, drawing from constituent local authorities and their plans and programmes, as well as key stakeholders such as the development agencies, infrastructure providers, and community and voluntary groups;
- Continuation of the process of embedding the overall approach to the NSS, including the pivotal position of the Gateways, in the policies and investment programmes of Government departments and their agencies at national, regional and local level;
- An increased appreciation at national level of the benefits of a more co-ordinated approach to enhancement of infrastructures and services at Gateway level, so that all elements necessary for its effective development as a major urban centre are addressed.

A specific aspect of this is enhanced communication between local authorities and the full range of key government departments and agencies to ensure clarity of vision and ongoing commitment to the focused development of each Gateway. Enhanced communication between key interests within individual Gateways would also stimulate sharing of best practice and innovative approaches. Such enhanced communications can be achieved through the:

- Establishment in each Gateway of a “Gateway Implementation Group” involving the key locally-based stakeholders, public and private;



- Appointment within each Gateway of a “Gateway Co-ordinator”;
- Establishment of a network of “Gateway Co-ordinators” to facilitate knowledge transfer, sharing of ideas and development of the best practice approaches to the promotion of the Gateways;
- Establishment of a designated network of contacts in all relevant government departments and agencies for the Gateway;
- Continuation of the work of the existing Inter-Departmental NSS Implementation Team.

6. Summary of Specific Investment Priorities

Physical Infrastructure:

- Completion of the major inter-urban routes, as recently re-affirmed in ‘*TRANSPORT 21*’, between Dublin and Belfast, Cork, Limerick, Galway and Waterford is key to development of the Gateways, as is development of improved road and public transport links between the Gateways;
- Significant investment is needed in the Gateways in both regional and local roads to open up strategically placed landbanks for housing and other types of development and to accelerate urban development;
- There is a need to address the planning and provision of local public transport in all the Gateways. This could be addressed through public transport partnerships created at local level, involving local authorities, private operators, CIE and others, and supported by appropriate transport planning capacity within the local authorities. Delivering on reform of the bus licensing system is an important facilitating factor in this regard;
- In water services much progress has been made in improving infrastructure. However, such has been the pace of growth and development that newly created capacity is being used more quickly than originally envisaged. This means that many plants recently completed to meet the requirements of the Urban Waste Water Directive will need to be further expanded within the period of the next NDP;
- There is a role for highly targeted investment and incentives to support the re-development of strategically located brownfield sites (such as former docks areas) within Gateways, and for continued significant investment in urban renewal and improvement activities.

Enterprise and Economy:

- It is critical for balanced economic growth that the Gateways are developed in a focused and cohesive way so that they provide a competitive base for the growth of the indigenous sector and the attraction of FDI;
- The enterprise and tourism development agencies have a role to play in identifying the needs of current and future enterprise based on their knowledge, plans and assessments for the Gateway, so that these can be embedded fully in implementation arrangements;
- Sectors such as retailing, tourism and local market services contain untapped potential in strengthening the local economy. There is a need for local authorities in the Gateways to develop



an extended view of their role in economic development, beyond the facilitation of FDI and in facilitating wider development in areas such as tourism, retailing and local services and enterprise.

Labour Force, Skills and Innovation:

- There is a need for a more co-ordinated and focused effort to bring together all the key stakeholders – institutes, enterprises, agencies and local government. Third-level institutes, together with these stakeholders, should formulate shared innovation strategies, building on existing strengths and outlining their respective roles within this. The potential to include other RTDI assets should be explicitly considered, including, for example, regional hospitals;
- The emerging Gateways face particular challenges, and new priorities will merit attention including non-technological innovation, prioritisation of disciplinary excellence, more cooperation with institutions in other Gateways and more collegiate working across individual smaller Institutes of Technology, and developing strategic alliances between university and IoTs.

Quality of Life:

- There is a need to ensure that the provision of community and social infrastructure such as schools, playing areas, community and sports halls takes place in a manner that is integrated with the development of major new housing areas. More effective and open collaboration between local authorities, the relevant Departments and developers as the plans and proposals for the development of such areas are being formed would be key in this area;
- Social inclusion is an important issue in Gateways and the significant investment in the renewal and upgrading of social housing and community facilities in many of the Gateways needs to be continued. Investment in social inclusion measures enhance the image, confidence and dynamics of Gateways;
- Beyond economic infrastructure and enterprise, other government Departments and agencies should also support the development of the Gateways and incentivise innovative Gateway proposals within their areas of responsibility by prioritisation within their existing budgetary allocations;
- Branding, promotion and marketing strategies need to be developed for the Gateways by local authorities, in close consultation with the industrial development and tourism agencies (which already cover elements of international marketing) to ensure a coordinated and comprehensive approach is taken to national and international promotion.



An Action Plan for the Gateways

Process

- (1) The relevant local authorities must co-operate in agreeing on and putting in place a structure to “drive” the development of each Gateway, backed with the resources that are necessary to enable the structure to act as the focus point for NSS implementation in each Gateway. This group would involve the local authorities, development agencies and the private sector, and should be on a cross-county basis where necessary. Specifically, we propose establishment of a “Gateway Implementation Group” (as a CDB Sub-Committee if appropriate), and appointment of a “Gateway Co-ordinator” in each location.
- (2) Having established structures and mechanisms for the development of each Gateway, the local authorities and their partners should, by September 2006, develop and reach mutual agreement on a 10 point implementation plan for the next five years, including the arrangements for co-ordinating development of the Gateway across administrative boundaries and supporting the joint delivery of the priority projects and interventions. Some mechanisms can interface with those established at regional level to oversee implementation of the Regional Planning Guidelines through the arrangements already in place.

Plans – Physical Infrastructure

- (3) The focused and prioritised implementation plan should be brought forward by the Local Authority outlining necessary physical plans and proposals to yield compact, sustainable and fast growth cities. The Local Authorities should, on the basis of these plans and proposals, work with Departments and agencies in leveraging the necessary infrastructure to implement the plans. This should include such areas as non-national roads, water services, schools, amenities and cultural facilities, public transport, energy and communications grids.

Plans – The Wider Agenda

- (4) Informed by current and future enterprise needs⁴, the enterprise development agencies should outline and integrate their plans, assessments and priorities for the Gateway so that these can be embedded fully in local and national implementation arrangements.
ctd.

⁴To cater for the existing enterprise base and potential future sectoral needs – for example, the availability of an Internet Data Centre in Cork would assist in the attraction of data intensive activities, including digital content and bio-informatics sectors.



(5) Building from existing initiatives⁵, the development agencies for third-level education bodies in the Gateways should develop cohesive plans to maximise the possible fit between the RTDI capabilities of third-level institutes and the strengths of existing firms (and potential future sectors) for the region in order to stimulate sectoral network development. There is a need to continue to build capacity within the regions by supporting technology transfer from other sources to the regions and Gateways through the relevant agency initiatives.

(6) There needs to be more effective and early stage cooperation between the relevant local and statutory authorities and developers to ensure the integrated provision of social and community infrastructure, e.g. schools, parks, sporting and cultural facilities with the development of new housing and other areas in the Gateways.

Funding

(7) The NDP 2007-13 should contain a reaffirmation of the role of Gateways as drivers of growth in their regional economies and in the national economy with an explicit commitment to meeting their realistic investment needs. Whether that is achieved by having an identifiable Gateway-specific investment package, or by prioritising resources within the conventional “horizontal” or sectoral packages, is dependent on the overall structure of the NDP. However achieved, the result should be clear tailored investment packages for each of the Gateways, with similar themes but different emphases, depending on specific local requirements.

(8) The Development Contribution Scheme system under Sections 48 and 49 of the Planning and Development Act 2000 should, taking account of local economic conditions, be harnessed for investment in local infrastructure in the Gateways, complementing and extending the impact of necessary national investment. Investment financed by such contributions should be branded accordingly, to build support for future development contribution schemes.

(9) Individual Government Departments should bring forward plans, within existing budgetary allocations, of capital investments and other resources to stimulate and support particularly innovative proposals for the Gateways, possibly on a competitive “challenge funding” basis. Previous examples in this regard are the Metropolitan Area Network initiative of the Department of Communications, Marine and Natural Resources and the Serviced Land Initiative of the Department of the Environment, Heritage and Local Government⁶.

⁵ Including third-level incubation centres (supported by EI), Innovation Fund, Centres of Science, Engineering and Technology (SFI), Industry Liaison Officers.

⁶ These schemes invited proposals from a wide range of urban centres including some of the Gateways.



Monitoring

(10) The existing Inter Departmental NSS Implementation Team should monitor progress in the development of the Gateways. As referred to in Section 5 above, a network of representatives of each individual Gateway Implementation Group should also be established to interact regularly with the national NSS Implementation Team and support it in its monitoring role.



1

Gateways: Background and Introduction



Gateways: Background and Introduction

Chapter Summary

- Gateways are important internationally and in Ireland. Dynamic growing Gateways are essential for stimulating growth throughout the regions; regions which perform well are those where the core city performs well - and vice versa.
- The concept of Gateway cities as drivers of national and regional growth and as a means of promoting more balanced regional development (BRD) was formally introduced into Irish policy in the 2000-06 National Development Plan (NDP), published in 1999.
- The NDP designated the five existing Cities (Dublin, Cork, Galway, Limerick, Waterford) as Gateways and stated that the National Spatial Strategy (NSS) would identify a limited number of additional Gateways. The NSS, published in 2002, added four more Gateway locations: Dundalk, Sligo, Letterkenny (linked to Derry), and Athlone/Mullingar/Tullamore as a linked Midland Gateway.
- The core aim of this study is to give further impetus to the Gateway approach. It identifies priority investment needs, by Gateway and by sector, and proposes mechanisms through which implementation can be realised. The report will feed into the new 2007-13 NDP and other national policies and programmes.
- The report recognises the distinct nature of each individual Gateway, including Dublin's unique and vital national role. It takes as given that there are ceilings on public investment represented by the five-year Capital Envelope framework. It recognises that:
 - increased prioritisation of Gateways involving reduced prioritisation elsewhere is a logical implication of the NSS;
 - Gateway investment is designed to drive economic growth in their wider regional hinterlands;
 - Gateways must be developed within the framework of wider national policies and priorities which should not be overridden by individual Gateway needs.



1.1 Background to the Study

1.1.1 Gateways in the National Development Plan 2000-06

One of the core objectives of the 2000-06 National Development Plan (NDP) was an improved regional spread of economic activity within Ireland. It describes the Government's objective for regional policy in the NDP as *"to achieve more balanced regional development in order to reduce the disparities between and within the two Regions and to develop the potential of both to contribute to the greatest possible extent to the continuing prosperity of the country"*. In particular, it focused attention on the strategic role of Gateway locations as drivers of national and regional growth. The Gateway concept has its formal origins in the 2000-06 NDP, which identified the five existing cities as Gateways and drivers of growth for their associated regions.

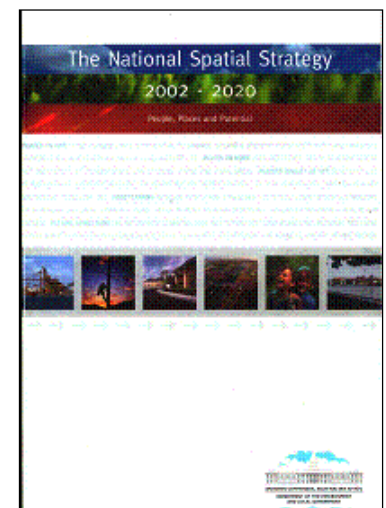
The NDP also distinguished between development of the five existing cities as Gateways (Dublin, Cork, Waterford, Limerick and Galway) and the identification for development as new Gateways of *"a limited number of strategically-placed centres"*.⁷ The NDP also contained the decision to prepare a National Spatial Strategy (NSS) to give effect to this latter commitment. This process culminated in the launch of the NSS in November 2002.⁸

1.1.2 The National Spatial Strategy

The NSS is a 20-year national spatial planning framework, up to the year 2020, designed to:

- (a) Achieve a better balance of social, economic and physical development and population growth between regions; and
- (b) Support better strategic land-use planning. In essence, the NSS aims to create balanced regional development (BRD) by *"developing the full potential of each area to contribute to the optimal performance of the State as a whole – economically, socially and environmentally."*

Consistent with the NDP, the NSS approach recognises the pivotal national importance of the Greater Dublin Area (GDA) to Irish economic success to date, and to its future overall economic performance. Dublin's role as the major national economic powerhouse, as Ireland's main international-scale economic centre, and as the national capital is affirmed. The NSS also emphasises the need to build up other smaller locations to positions of strength on a national and international scale, generating jobs and services closer to where people live. Unbalanced development is identified as adversely affecting quality of life,



⁷ National Development Plan, para. 3.20

⁸ Department of the Environment and Local Government, *The National Spatial Strategy 2002-2020: People, Places and Potential*, Government Publications, 2002.



with travel-to-work distances in particular increasing significantly. This creates the need for BRD in tandem with appropriate local land use policies.

The NSS therefore emphasises the need to renew, consolidate and develop existing cities, towns and villages with careful, sensitive and efficient use of urban land. It also acknowledges the importance and the challenge of ensuring that there is effective implementation of its proposals, with a need for policies and programmes to be more spatially coherent and consistent with NSS objectives, so that an overly diffuse approach to public investment and the promotion of economic activity can be avoided. This report is envisaged as a contribution in this regard, with specific reference to the Gateways.

The NSS of course also assigns important functions to other urban centres including designated hubs, County towns and others. These are not dealt with here simply because they are not the focus of the report.

1.1.3 Role and Characteristics of Gateways

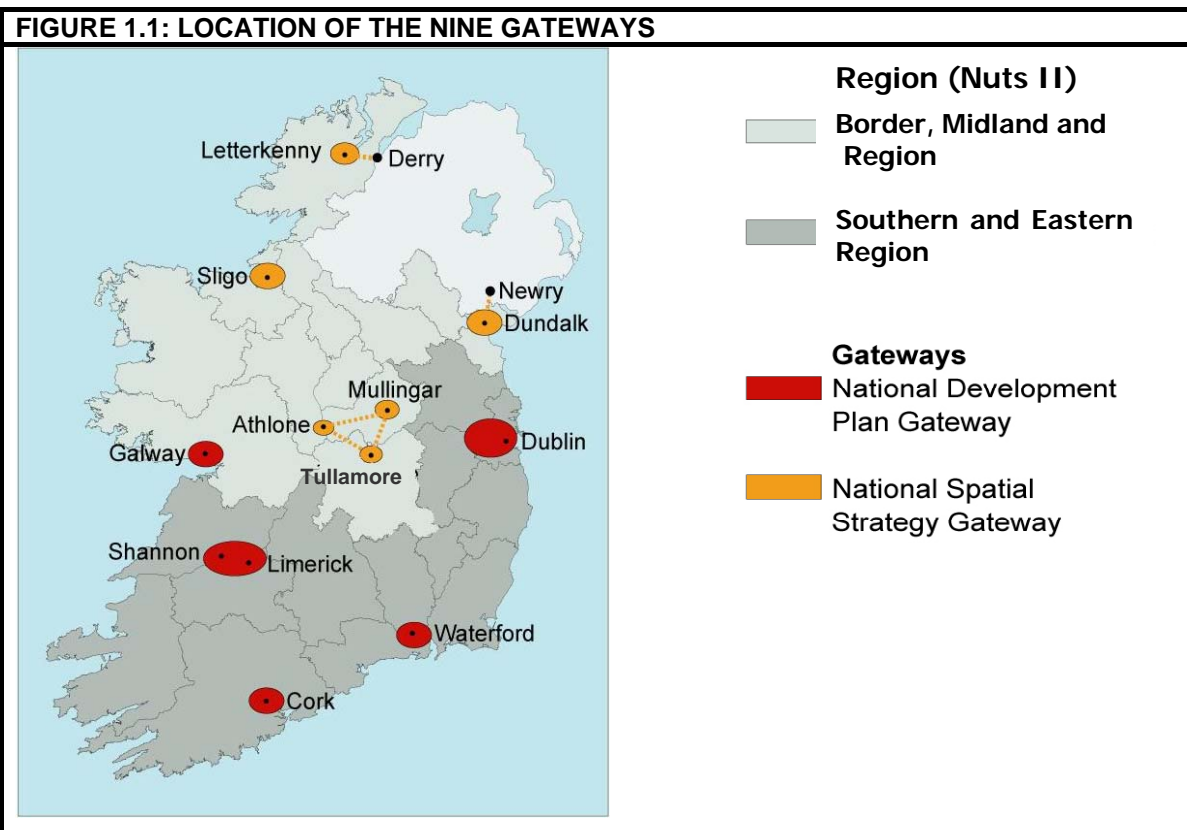
As described above, the 2000-06 NDP designated the five existing cities as Gateways to drive future growth, with the intention that a small number of additional regional Gateways be identified by the NSS and promoted over the period of the plan as *“urban growth centres that could complement the existing Gateways and drive development throughout the regions”*. The NSS identified Dundalk, Sligo, Letterkenny (linked to Derry) and the Midland-linked Gateway of Athlone, Mullingar and Tullamore as the four additional Gateways. A series of complementary hub towns were also selected as targets for the strategy. The location of the Gateways is illustrated in Figure 1.1.

Gateways are described in the NSS as having a *“strategic location, nationally and relative to their surrounding areas, and providing national scale social, economic and support services”*. Key to the development of the Gateways is enhancement of their critical physical, social and knowledge capital in order to support their expanded roles as strategic development centres. The NSS also sets out a series of key characteristics of Gateways in an Irish context that need to exist or be achieved over the period of the NSS:

- *A large urban population (of the order of 100,000 and above) set in a large urban and rural hinterland;*
- *Wide ranges of primary/secondary education facilities and national or regional third-level centres of learning;*
- *Large clusters of national/international scale enterprises, including those involved in advance sectors;*
- *A focal point in transportation and communication terms: (a) on the national roads and rail networks, (b) within one hour of an airport, either with international access or linking to one with such access, (c) adequate, reliable, cost-effective and efficient access to port facilities and (d) effective, competitive broadband access;*



- *Integrated public transport with facilities for pedestrians and cyclists;*
- *regional hospital/specialised care;*
- *City level range of theatres, arts and sports centres and public spaces/parks. Cultural and entertainment quarters;*
- *City-scale water and waste management services;*
- *Integrated Land Use and Transport planning frameworks;*
- *Phased zoning and servicing of land-banks in anticipation of needs associated with growth;*
- *Strategic Development Zones.⁹*



At the core of the Gateway concept, therefore, is the development of the nine centres in conjunction with their hinterlands to ensure that potential in and around each is realised over the period of the NSS up to 2020. For many of the Gateways, much of this is already well in hand, while for others this aim is ambitious.

⁹ National Spatial Strategy, Figure 3.1.



1.1.4 Regional Planning Guidelines

The objectives of the NSS were further reinforced at Regional Authority level by the adoption of Regional Planning Guidelines (RPGs) in each region.¹⁰ Published during 2004, these have been drawn up using the NSS as a reference framework, and they are intended to be a vehicle through which its vision and objectives are operationalised and delivered.

Within the RPGs there are implications for Departments and agencies, including the Departments of: Transport; Enterprise, Trade and Employment; Education and Science; Health; Arts, Sport and Tourism; and Environment, Heritage and Local Government, and their agencies. It is intended that these implications will be taken on board by the Departments as they plan future interventions. The nature of such interventions is also more explicitly stated within the Guidelines, and they indicate critical enabling investments that need to be given priority in order to facilitate growth in each region.

Overall, the RPGs potentially play an important role in focusing attention on the Gateway concept, at both national and local level. However, it is again critical that attention is paid to ensuring that they are effectively implemented, and that policy and practice is directed at moving the NSS forward. It is in such a context that the need for this study was identified with specific reference to the Gateway locations.

1.1.5 Capital Envelopes and the 2007-13 NDP

The need to infuse the NSS spatial framework into national policies and programmes is now built into the recent Department of Finance Guidelines on capital investment. These require that Annual Reports of individual spending Departments regarding capital investment programmes must include “a statement showing how the priorities are consistent with the National Development Plan, the National Spatial Strategy and other relevant programmes and strategies”.¹¹ In future, all investment funded under the Public Capital Programme (PCP) must articulate, operationalise and report on compliance with the NSS.

This latter requirement takes on particular significance in the context of the proposed new NDP 2000-13 announced by the Government in August 2005. With the likely large reduction in EU Structural Fund assistance, this next NDP will be almost entirely Exchequer-funded and will be the overall strategic framework guiding the PCP. The Government’s August 2005 announcement states that the new plan will “take account of the National Spatial Strategy, environmental sustainability, the all-island dimension and the requirements of the EU Lisbon process”. The above reference to the NSS is evidence that the strategy will be an important policy input to future investment.¹²

¹⁰ South-East Region; South-West Region; Mid-West Region; Greater Dublin Area; Border Region; Midland Region; West Region.

¹¹ Department of Finance, *Guidelines for the Appraisal and Management of Capital Expenditure Programmes in the Public Sector*, February 2005, Appendix 3.

¹² Government Information Service, National Development Plan (2007-13), 4th August 2005.



1.1.6 'TRANSPORT 21' Strategy

The most recent major policy initiative relevant to the NSS generally, and the Gateways in particular, was the launch of the 'TRANSPORT 21' national transport strategy on 1st November 2005. Its overall objective, as described by the Taoiseach at its launch, is to ensure that in transport terms Ireland can "move from far behind to the lead".¹³ The Strategy represents the overall national strategic framework for investment in transport, i.e. national roads, rail and other public transport, over the 10-year period of 2006-15 inclusive. It involves an estimated cost of €34b, including €26b in Exchequer spend, and €8b PPP investment (of which €2b is toll funding). This amount does not include investment in non-national roads, ports or airports. A summary of selected major projects and their completion dates is shown in Figure 1.2.

The new Strategy will therefore be completed within the timeframe of the NSS. It straddles the final year of the current NDP, all of the next NDP, and two years thereafter. The plan combines the reaffirmation of existing commitments and the addition of a number of major new ones. Broadly, the commitments in it span national roads (including the Atlantic Road Corridor), public transport investment in the Greater Dublin Area, public transport outside Dublin (principally in relation to Cork, Galway, Limerick and Waterford), and the new Rail Corridor. These investments as they relate to the individual Gateways are referred to in later chapters of the report. The Strategy also involves revised time commitments for major projects as well as emphasising mechanisms for ensuring delivery on time and on budget.

The linkage between the 'TRANSPORT 21' Strategy and the NSS was explicitly acknowledged by Government. Speaking at its launch, the Minister for Finance stated that "if we are to spread growth widely then we must invest and support the NSS and in particular in the transport links between the NSS Gateway centres. Equally we must underpin the central role of the Greater Dublin Area".¹⁴ In practice, this linkage involves a number of components. It includes major investment in public transport in the GDA as the national Gateway, but it also involves investment in new commuter rail links in Cork and in Galway and investment in Quality Bus Corridors (QBCs) in Dublin, Cork, Limerick, Waterford and Galway.

In relation to links between the Gateways, the new strategy reaffirms the completion of components of the major inter-urban routes (MIUs) already targeted under the present NDP, i.e. the motorway network linking Dublin to Waterford, Cork, Limerick and Galway. It also highlights the upgrading of the Atlantic Road Corridor, which will link the six Gateways of Letterkenny, Sligo, Galway, Limerick, Cork and Waterford.

¹³ An Taoiseach, Bertie Ahearn T.D., at the launch of 'TRANSPORT 21', Dublin Castle, 1st November 2005.

¹⁴ Minister for Finance, Mr Brian Cowen, T.D., speaking at the launch of 'TRANSPORT 21', 1st November 2005.



FIGURE 1.2: 'TRANSPORT 21' COMPLETION DATES FOR SELECTED MAJOR PROJECTS	
Year	Major Projects
2006	Introduction of hourly services on Dublin-Cork rail route Dublin Port Tunnel
2007	New Portlaoise train depot Delivery and introduction to service of 120 intercity railcars M1 Motorway M50 Upgrade (Phase 1)
2008	Joining of the Tallaght and Sandyford Luas Lines in Dublin City centre Luas extension from Connolly to Docklands Luas extension Tallaght to Citywest (subject to developer contributions) Cork commuter rail service to Midleton Ennis – Athenry rail line (Western Rail Corridor)
2009	Dublin City centre rail resignalling project M3 Motorway Phase 1 of Navan Rail Link Opening of new Dublin City centre rail station Limerick Southern Ring Road Waterford Bypass Galway – Athenry commuter rail services
2010	Metro West Phase 1 Tallaght to Clondalkin Kildare rail upgrade Sandyford Luas line extension to Cherrywood Dublin-Cork Inter-Urban Motorway Dublin-Limerick Inter-Urban Motorway Dublin-Galway Inter-Urban Motorway Dublin-Waterford Inter-Urban Motorway M50 Upgrade (Phase 2)
2011	Metro West Phase 2 Clondalkin to Lucan Athenry – Tuam rail line (Western Rail Corridor)
2012	Metro North Luas extension from city centre to Liffey Junction Metro West Phase 3 Lucan to Blanchardstown
2013	Lucan to centre Luas Rail Safety Programme completed
2014	Metro West Phase 4 Blanchardstown to Ballymun Tuam – Claremorris rail line (Western Rail Corridor)
2015	Interconnector completed Extend Electrification to Balbriggan, Maynooth, Navan, Hazelhatch Phase 2 of Navan rail link Luas extension Cherrywood to Bray
Note: the 2011-15 road programme will involve the development of approximately 150 km of dual carriageway, 400 km of "2+1" roads and 300 km of single carriageway. The sequencing of projects for implementation post-2010 will be decided by the National Roads Authority at a later date.	
SOURCE: DEPARTMENT OF TRANSPORT	



1.2 Study Objectives and Work Programme

1.2.1 Objectives of the Study

The overall aim of this study is to help progress the Gateway component of the overall NSS. Within this overall objective, the study has two core requirements:

- To identify investment priorities that are key to development and growth in Gateways, particularly those critical to unlocking the potential of the Gateway and its hinterland;
- To examine project prioritisation and implementation mechanisms at the local and national level, the interactions between these two levels, and the extent to which the NSS could play a stronger role in the consideration and prioritisation of longer-term investment priorities.

The report identifies key short-term priorities for development within each of the Gateways, and brings forward practical and realisable priorities for investment in the future. Alongside the establishment of investment priorities, emphasis was placed on ensuring that these local priorities are given national prominence and that mechanisms exist or are introduced that will facilitate the realisation of NSS objectives in Gateway locations.

1.2.2 Summary of Work Programme

A two-phase approach was defined by the Terms of Reference. The first phase compared and contrasted varying approaches being taken to meeting NSS objectives in the nine Gateways, and established those characteristics (in terms of scale, growth and competitiveness) that should stand as key aspirations for these Gateways to deliver the critical mass and regional development potential envisaged by the NSS. The second phase looked at three specific Gateways (Sligo, Waterford and Cork) and focused on the potential for accelerated development, short- to medium-term obstacles impeding this, and the existing planning and investment prioritisation mechanisms in place. A short desk-based examination of international experience of Gateway locations was also undertaken.



PHASE 1 TASKS

- Inception phase consisting of meeting and workshop with clients
- Consultation and research to establish key defining features of a Gateway
- Development, distribution and analysis of local authority input checklist to gather views from all Gateways regarding performance, future prospects and key gaps across key characteristics
- Quantitative/qualitative research across key characteristics for each Gateway
- Review of local, regional and national strategies to establish future direction of each Gateway
- Analysis of key investment priorities by merging desk research with local authority and agency feedback
- Workshops with local authority and agency representatives to discuss common issues

PHASE 2 TASKS

- Selection of three Gateways for further in-depth case study analysis based on agreed criteria (Cork, Sligo, Waterford)
- Case study visits to each of the selected Gateways, meeting key local stakeholders including representatives from local authorities, state agencies, Chambers of Commerce and other business representatives, and social partners
- Steering Group discussions with key national stakeholders with regard to emerging findings and integrating NSS objectives into national policy and programmes
- Research into international comparator locations that can illustrate best practice in driving forward a Gateway concept
- Preparation of final report highlighting the findings from the study and proposing an action plan for driving forward implementation of the NSS

1.3 Key Study Parameters

A number of parameters of the study are outlined below which flow broadly from the NSS, and re-emphasise many parameters set out within the strategy itself.

Focus on Gateways

A natural reaction to the report may be to ask why it emphasises the Gateways exclusively and does not deal with hubs or with wider regions. The immediate reason for this is that it is what was required by the Terms of Reference as described above. More substantively, the focus of the study is on ways to give greater momentum to the specific Gateway dimension of the NSS, as key drivers of economic development of their regions. Hence there is no implication here that hubs and other locations do not also have investment requirements.

Definitions and Data

As set out in the paragraph above, the specific focus of this report is on the nine Gateway locations as designated in the NSS. The precise geographical entity involved in the Gateways can be open to different interpretation. This issue is added to by the concept of linked Gateways, by the overall NSS emphasis on Gateways in their regions, and by the fact that investment physically outside a Gateway (however defined) can have major implications for it, e.g. investment in national primary roads.



The main geographic focus of this report is on the Gateway Cities and towns themselves, i.e. the contiguous built-up areas generally recognised as constituting e.g. Waterford, Dundalk, etc. and the report should be read in this pragmatic sense.

Notwithstanding the above, when it comes to data, those used in the report inevitably vary either for reasons of the point being made or availability. Working “outwards” data could refer to:

- Cities and towns as defined for local authority administrative purposes – usually rather narrow for our context;
- Cities, towns and their immediate environs – as defined by the CSO, representing the built-up area, and in principle the most appropriate for our purpose;
- Hinterlands, catchment areas and drive time areas – which are much wider than the built-up areas and which represent areas of direct impact of the cities/towns. We refer to these occasionally, but they are not our immediate focus;
- Regions, which can refer to the two NUTS II Regions (BMW and S&E), eight “NUTS III” Regional Authority areas, or other definitions used by some individual bodies. We use some NUTS III data in tables and charts. Throughout, table and chart titles, headings and sources indicate the nature of the data involved.

Financial Constraints

The report is being written in a context where rolling five-year capital envelopes have already been set out by the Department of Finance for the years 2006-10 (see Section 1.1.5 above). The report and its recommendations are therefore framed in this context. In keeping with the spirit of the NSS, they are about where these resources should be spent rather than about additional “NSS resources” over and above the existing capital envelopes. There is, however, also an implication in the NSS itself that Gateways are of particular significance, nationally and regionally, hence their designation as Gateways in the first place. This, combined with the need to give some momentum to this flagship aspect of the NSS, suggests that (at least for the period of the next NDP) the Gateways receive specific priority and focus for the combined benefits of Gateways themselves, their regions, and the national economy.

Nature of “Priorities” Identified

Gateway-specific priorities listed in this chapter have been based principally on responses from the relevant City or County Managers and IDA Ireland and Enterprise Ireland Regional Managers to a request to identify their priority investments, and also from an examination of Regional Planning Guidelines and agency regional strategies. In each case the managers were encouraged to consult locally with other relevant stakeholders. The resulting proposed priorities were screened by the consultants, in consultation with the clients, in terms of NSS and NDP relevance, and gaps involving other more generic needs.



Chapter 4 also identifies some more generic investment needs in sectors such as RTDI and public transport. These generally involve sectors where the study has not identified individual Gateway-specific priorities.

National Policy Parameters

Many of the sectors and topics being dealt with here in a Gateway context are the subject of national, sectoral or thematic policies. In these cases, the interests of individual Gateways cannot be promoted in isolation from national policy implications. A clearly defined aspect of this is in areas where there are issues of national capacity and requirements that should not be exceeded, and in such cases we regard any recommendations here as made within that context. In a number of instances we avoided recommendations that might be in the interest of an individual Gateway, but the meeting of which would be likely to exceed national requirements. Specific examples of this would include the cases of airport capacity, the number of universities in Ireland and existing decisions regarding national road and rail investment in the context of ‘*TRANSPORT 21*’.

The Role of Dublin

The NSS correctly emphasises on many occasions that Dublin is Ireland’s premier Gateway, that it has been key to recent economic success, and that the NSS embraces its needs and requirements at least as much as those of other Gateways. More than for any other individual Gateway, a successful Dublin is critical to a successful Ireland.

Any rebalancing of economic activity within Ireland is therefore seen in the context of overall expansion, not as part of any downgrading or absolute reduction in the size and significance of Dublin. This is the approach also adopted here. Dublin is treated as one of the nine Gateways and as “*primus inter pares*” among them, and its specific needs and requirements are recognised.

1.4 Report Structure

The report has five Chapters. This chapter, “**Gateways: Background and Introduction**”, sets out the overall background to the study, its objectives, and its key parameters.

Chapter 2, “**Gateways: Why Are They Important?**”, recaps on the role of urban centres in economic development generally, summarises recent international literature and thinking on the development of Gateways, and summarises recent economic experience in Ireland in this regard.

Chapter 3, “**Gateways: Progress and Prospects**”, presents profiles of each of the nine Gateways individually, summarises their key parameters, and identifies a number of key investment priorities and constraints in each one.



Chapter 4, “**Gateways: What Needs to Be Done?**”, reviews the Gateway needs thematically and summarises the requirements and issues arising across the key areas of infrastructure, enterprise and economy, labour force, skills and innovation, quality of life, and governance and leadership.

Finally Chapter 5, “**Gateways: Conclusions and Recommendations**”, summarises our conclusions and sets out our proposals.



2

Gateways: Why are They Important?



Gateways: Why are They Important?

Chapter Summary

- From early times, much economic and social development has been concentrated in centres because of the many advantages to which critical mass and economies of scale in key locations give rise. The resulting importance of cities and other urban centres is widely recognised and acted upon internationally, and is the basis of European and other modern spatial development planning.
- Much modern economic growth is urban-led. This is because urban centres contain the key ingredients of this growth including international transport access, higher education institutions, globally trading firms, specialist support services, highly educated workforces, and the amenities which these workforces need for quality lifestyles. Knowledge-based enterprise congregates mainly around cities and other urban areas.
- Current international thinking therefore sees growing Gateways as essential for growing regions, not as an alternative to growing regions, and envisages Gateways as multi- as well as single-centred. The NSS is consistent with this international approach.
- Ireland's own recent development experience confirms the beneficial role of significant urban centres, with national growth having been led by Dublin as the main international-class Gateway, and with much regional growth also occurring in and around growing regional centres. Ireland's more urbanised regions also have the highest output per capita.
- Ireland's population and economy look set to grow consistently for a considerable period ahead, and most regions will also grow. However, for the objective of more balanced and sustainable development within Ireland to occur, the designated NSS Gateways at their various levels must take on enhanced roles in their regions. The alternative is further urban sprawl (especially along the east coast), highly dispersed population growth, increasing commuting times, continuing difficulty in delivering quality public transport, and increased costs of providing modern infrastructure and services.



This modern recognition of the important role of cities also increasingly leads to positive policies towards their development, protection and renewal. Central to this is identifying the key characteristics of cities, especially cities targeted for further development. International literature contains many such typologies. For the purpose of this study of Gateways in Ireland we use the one shown in Figure 2.1. This groups the key characteristics of Gateways under five headings:

- 1 Economic and social infrastructure;
- 2 Enterprise and economy;
- 3 Labour force, skills, and research, technology development and innovation;
- 4 Quality of life;
- 5 Local capacity and leadership.

This classification is used in subsequent chapters.

FIGURE 2.1: KEY CHARACTERISTICS OF A SUCCESSFUL GATEWAY	
Economic Infrastructure	good basic infrastructure, including public infrastructure in areas of transport, communications, water, waste, housing, energy.
Enterprise, Economy	economic diversity, clusters, agglomerations (reinforcing firms), international business networks.
Labour Force, Skills and RTDI	skills and participation rates, availability of creative/skilled workforce, knowledge transfer, innovation in firms and organisations, entrepreneurship.
Quality of Life	access to higher order services including segments of retailing, specialist medical and health care, recreation/leisure and cultural facilities and quality education (including higher education), includes quality urban centres and streetscape, quality physical environment generally, good physical planning, absence of crime.
Local Capacity and Leadership	decision-making capacity, effective governance, capacity to mobilise public and private actors for a common agenda, leadership, effective links with central government.

2.2 Role of Gateways: International Perspectives

2.2.1 Polycentric Development

One of the recurring themes in the international literature on regional development since the early 1990s concerns the role of cities and city-regions as engines for national and regional development. Following the demise of growth centre strategies in many countries in the 1970s, there was a tendency to neglect the constraints for regional development associated with the inherited legacy of hierarchically structured



national urban systems. Throughout the 1990s, renewed attention was directed to devising new ways of managing urban systems in order to achieve progress regarding two potentially conflicting policy objectives, namely regional competitiveness on the one hand and territorial cohesion on the other.

The European Spatial Development Perspective (ESDP) Report, published in 1999¹⁵, introduced the concept of polycentric urban development as an alternative to stand-alone growth centres. It was, in this context, presented as a keystone for development strategies that simultaneously seek to enhance competitiveness and reduce the extent of disparities between regions. While there is still expert debate over the precise meaning of polycentric urban development, and also much discussion concerning the rationale underpinning the concept, a useful broad working definition has been proposed by the European Spatial Planning Observation Network (ESPON) research project. It says that a polycentric policy is “a policy addressing the distribution of economic and/or economically relevant functions over the urban system”.¹⁶ Viewed in this way, the NSS is a polycentric strategy designed to involve all major Irish urban centres.

2.2.2 Objectives of Spatial Development Strategies

A recent review undertaken for this study of the aims and contents of spatial development strategies in more than 20 countries (see Annex for further details) identifies two main groups of objectives aimed at:

- (a) Achieving a better balance within national urban systems;
- (b) Enhancing the competitiveness of more city-regions as a response to the influences of globalisation and internationalisation (and to the relative decline in the willingness and ability of nation states’ governments to directly intervene against market forces).

The issue of balance, which is an inward-oriented objective, is usually in practice associated with a need to strengthen the middle tier of the urban system and/or to provide a strong focus for development in predominantly rural areas at risk of depopulation. This is the policy situation in European countries such as Denmark, Finland, Norway, Latvia, Estonia, France, Poland, Portugal, Greece, Italy and the UK.

The objective of increasing the international competitiveness of cities is an outward-oriented goal that seeks to establish stronger local/regional and global interconnections. It is a key objective in almost every country, but with different forms of expression and operationalisation reflecting the local context. Thus there are proposals for “anchor cities” and “urban axes” beyond Lisbon and Oporto to strengthen competitiveness throughout Portugal; similarly the twin poles of Larissa-Volos to complement Athens and Thessalonika in Greece; a network of seven “national centres” in Denmark to increase the competitiveness of regions outside Copenhagen; “duopols” in Poland; and “urban networks” in parts of the UK, France, Belgium, Germany and Italy. Resonances within the NSS are again obvious.

¹⁵Commission of the European Communities, *European Spatial Development Perspective: Towards Balanced and Sustainable Development of the Territory of the EU*, Luxembourg: Office for Official Publications of the European Communities, 1999.

¹⁶ ESPON Project 111, Annex B, p.11.



Either on a stand-alone basis, or as part of such wider national policies, strategies to develop individual cities in their regional context can also be seen in many countries and regions. Two examples – Inverness in the Scottish Highlands and Oulu in Northern Finland, are described in the accompanying text boxes. As can be seen, in each case a variety of mechanisms are being used, generally contextualised in their own specific regional and national situation.

2.2.3 The NSS in an International Context

It is evident from the brief review of current practice across European countries that most governments are seeking to use spatial plans to address the twin objectives of competitiveness and cohesion. In reality there may be a contradiction between these goals, at least over the short-term. This is now recognised in countries such as Poland and in other new EU Member States, where enhancing international competitiveness by concentrating supports around the capital regions is the priority objective even though it may increase internal inter-regional disparities over the short-term.

In Ireland, this choice was the de facto situation during the 1980s and 1990s until it became apparent, during the course of preparing the current NDP, that a spatial strategy was needed to enhance the competitiveness of places beyond the Greater Dublin Area. This was in turn reflected in the renewed NDP emphasis on balanced regional development, on all five existing Gateway cities and on the commitment to prepare the NSS (see Chapter 1).

The role of Gateways in the NSS as the principal means of enhancing regional potential and competitiveness, and also of promoting more balanced regional development, is very much in keeping with the conceptual framework underpinning similar strategies throughout Europe – in both large and small countries and in countries at very different levels of economic development. Typically, capital regions such as the GDA are now considered vital to overall national competitiveness in every country. In addition, in most countries a small number of relatively large cities, either individually or linked via networks, are regarded as also being internationally competitive.

Other strategically located small to medium size centres have been selected in order to promote cohesion by enhancing local competitiveness. This international approach is very similar to the NSS, albeit with the relative size of centres of each type generally “scaled back” to reflect smaller Irish sizes. That said, the newer Gateways elsewhere are also not always necessarily much larger than Irish ones.



A Growing Gateway City: Inverness

Inverness is the most northerly city in Scotland (and the UK) and the regional capital of the Scottish Highlands. From being something of a backwater, it has become a rapidly growing and popular city, with a degree of “chic” in a Scottish and UK context. It is the fifth largest city in Scotland after Glasgow, Edinburgh, Aberdeen and Dundee. It has a population of about 60,000 in the city and its environs, and it is the fastest growing city in Scotland. Its relatively small size and rural hinterland make it not dissimilar to a number of the Irish Gateways.

Inverness has a number of natural advantages which have aided its development: its location means it is very much the natural Gateway to the Highlands and all major roads and road traffic must pass through it; it is located in an extremely scenic area and close to the Scottish Highlands themselves; it is located by the sea (Moray Firth) and it is by far the largest population centre in the Highlands and Islands. The nearest city, Aberdeen, is about two hours away; but is on the east coast and has a quite different orientation.

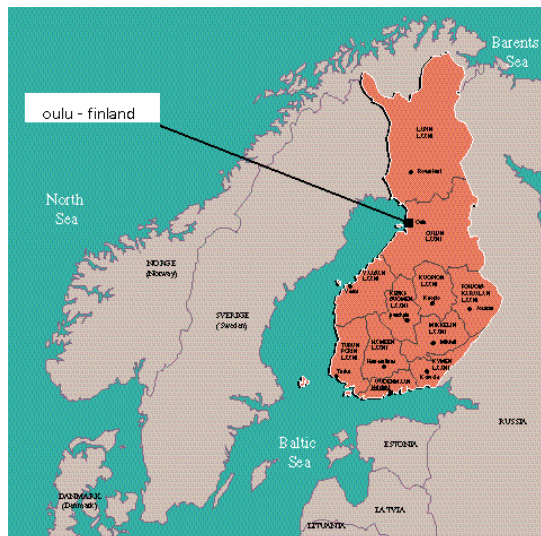
Factors in recent growth include rebuilding of the major national routes (A9) in the 1970s and 80s (which nearly halved journey times to the Central belt); emergence of the city as a new high-tech industry base (particularly a small number of bio-pharma companies); decentralisation of a number of Scottish Ministries and agencies from Edinburgh to Inverness; development of its airport and frequent air services to locations in Scotland and England; its location in a major tourism area and recent development of city-break and conference tourism in Inverness itself, and major public investment in regional health services. Apart from the Regional Hospital (Raigmore) being a major employer, Highlands and Islands Enterprise (HIE) is also investing in a £16m Centre for Health Science, including business incubators, to capitalise on teaching and research at the hospital – displaying an enterprise-public service linkage that might have RTDI potential in Irish Gateways. These and other softer factors (including the recent success of its soccer team) have also given rise to a certain “buzz factor” within Scotland, and it is seen as an attractive place in which to locate, visit and live. A major Scottish law firm, for example, has recently opened a branch there. It has also attracted retirees.

Inverness also has some considerable constraints. Its surrounding road network is below UK par and involves little or no motorway. It has rail links, but mainly southward in service terms. It must compete for public resources with a large rural hinterland, and in local government terms it is part of the overall Highlands Council area (akin in size to an Irish region) and does not have its own locally elected council (it does have an Area Committee of Councillors within the overall Council). Unlike most Scottish centres, Inverness also does not have a university. However, plans are afoot to create a “University of the Highlands and Islands” (UHI) with a dispersed collegiate structure, based on existing institutions, with Inverness College as its largest partner.

Policy developments have also contributed to Inverness’ recent growth. These include devolved government in Scotland generally, which has given renewed emphasis to Scottish regional development, and preparation of a Scottish Spatial Strategy, which endorses the role of Inverness as one of the six cities.* Inverness also benefits from the existence of the HIE, headquartered there, which takes a broadly-based lead economic development role but with a wider remit than individual Irish agencies (in effect it is more akin to Údarás na Gaeltachta, and combines the roles of IDA, EI and the CEBs).

Within the city itself, its interests are promoted through an “Inverness City Partnership”, which involves representatives of the Highlands Council, HIE, Visit Scotland, the Chamber of Commerce and the City Centre Management Initiative. This body has prepared an agreed vision for the city and is involved in its overall promotion (see www.inverness-scotland.com). The Partnership is supported by a “city growth fund” operated by the Scottish Executive.

* *National Planning Framework for Scotland*, The Scottish Executive, 2004.



A Border Gateway in a Functional Urban Network: The Oulu Phenomenon

The city of Oulu is located in the Lapland region of Northern Finland on the coast of the Gulf of Bothnia. It has a population of 166,000 (1999 data) and is one of the leading urban centres in the Finnish-Swedish transnational networked region known as the Bothnian Arc. Over the past two to three decades the economy of Oulu and its region has been transformed. It has moved away from a dependency on timber, paper and pulp industries to successful specialization in businesses in the high-tech sector, particularly those in electronics, telecommunications, multimedia, biotechnology and environmental technologies. Oulu, along with its crossborder Swedish counterpart, the city of Lulea, has become the “motor for development” in the Lapland territories of the Bothnian Arc region.*

The “Oulu Phenomenon”, as it has been termed, has been achieved through strategic planning that has benefited from EU support (it fits well with the EU policy for the Northern Dimension). More notably, it has been achieved by the proactive role played by Government in mobilising local forces via regional policy, higher education and follow-through between these and both local authorities and local entrepreneurs. The development of knowledge expertise in both Oulu and Lulea serve to underpin a regional strategy to promote economic development based on four industrial clusters (information technology, forestry, metallurgy and health) in the Bothnian Arc. Due to the inhospitable climate and harsh nature of the northern environment, and the low levels of population within the region, the Swedish and Finnish governments recognised the importance of pursuing cooperative planning strategies to ensure the long-term sustainable economic development of the region. Oulu and Lulea became the focal points of the Bothnian Arc network, which became formally recognised in 1998. The Bothnian Arc is now an established regional network that stretches across national borders as well as different industries in both the public and private sectors. It is recognised as Europe’s northernmost cooperating region.

The fact that Oulu has been successful in embedding Nokia as an anchor firm within the area, together with the achievements of creating a Technopolis and Mediapolis, have helped to establish Oulu as the “High-Tech Capital” of the Nordic countries. More recently, another network entitled the “Bothnian Arc of Knowledge” has been established to assist disadvantaged areas through the diffusion of high-tech industry into poorly connected parts of the region – in the expectation that this will lead to the development of new networks and clusters over time.

Such developments require strategic spatial planning to facilitate further cross-sectoral regional collaboration on a transnational basis. To assist in this, a series of fora have been created to oversee developments. For example, a Health (or “Wellness”) Forum based in Oulu involves over 20 companies together with Oulu University, Oulu Polytechnic, Mediapolis and Oulu University Hospital. The objective of the network is to achieve sufficient critical mass to leverage additional funding support from the EU and Central Government sources in Finland and Sweden. It is envisaged that leveraged funding for additional transport infrastructure (to support local inbound and outbound supply chain activities) will enhance access to markets and services for peripheral areas whilst developing environmentally sensitive health tourism in the region. Such development, in turn, could lead to the establishment of strategic corridors between the main urban centres in the region and the larger municipalities in Scandinavia and Russia.

*www.tu-chemnitz.de/phil/geographie/publikationen/krao/krao1.pdf

*www.bothnianarc.net/slutrappporter/programme_baok.pdf



2.3 Recent Development Experience in Ireland

2.3.1 Regional Growth Experience

Ireland's own recent experience also points to the importance of urban centres in economic growth.

Table 2.1 shows for each of the seven regions (Dublin and Mid-East combined) the share of its population resident in urban areas, the share of its population in its largest urban centre, and output per capita (GVA per person) and population growth between 1996 and 2002. These are shown in the five columns of Table 2.1.

TABLE 2.1: REGIONAL GROWTH AND URBAN STRUCTURES, 1996-2002					
Region	Urban as % of Total Population*	Largest Urban Centre Pop size 2002	Largest Urban Centre as % of Regional Population*	GVA Growth Per Person at Basic Prices 1996-2002*	Pop Growth 1996-2002*
Border	33% (6)	Dundalk Town and Environs-32,505	7.5% (6)	83.6% (6)	6.2% (6)
Midland	37% (4)	Athlone town and Environs-15,936	7.1% (7)	84.5% (5)	9.8% (1)
West	34% (5)	Galway and Environs-75,789	19.9% (4)	88.5% (4)	7.9%(4)
Dublin and Mid-East	87% (1)	Dublin City and Environs-1,004,614	65.4% (1)	94.5% (3)	9.3% (2)
Mid-West	43% (3)	Limerick and Environs-86,998	25.6% (3)	80.3% (7)	7.2% (5)
South-East	43% (3)	Waterford and Environs-46,736	11.0% (5)	109.7% (2)	8.2% (3)
South-West	55% (2)	Cork and Environs-186,177	32.1% (2)	164.7% (1)	6.2% (6)
State	60%	-	-	103.7%	8.0%

* Bracketed numbers are the regional rankings, i.e. 1 to 7

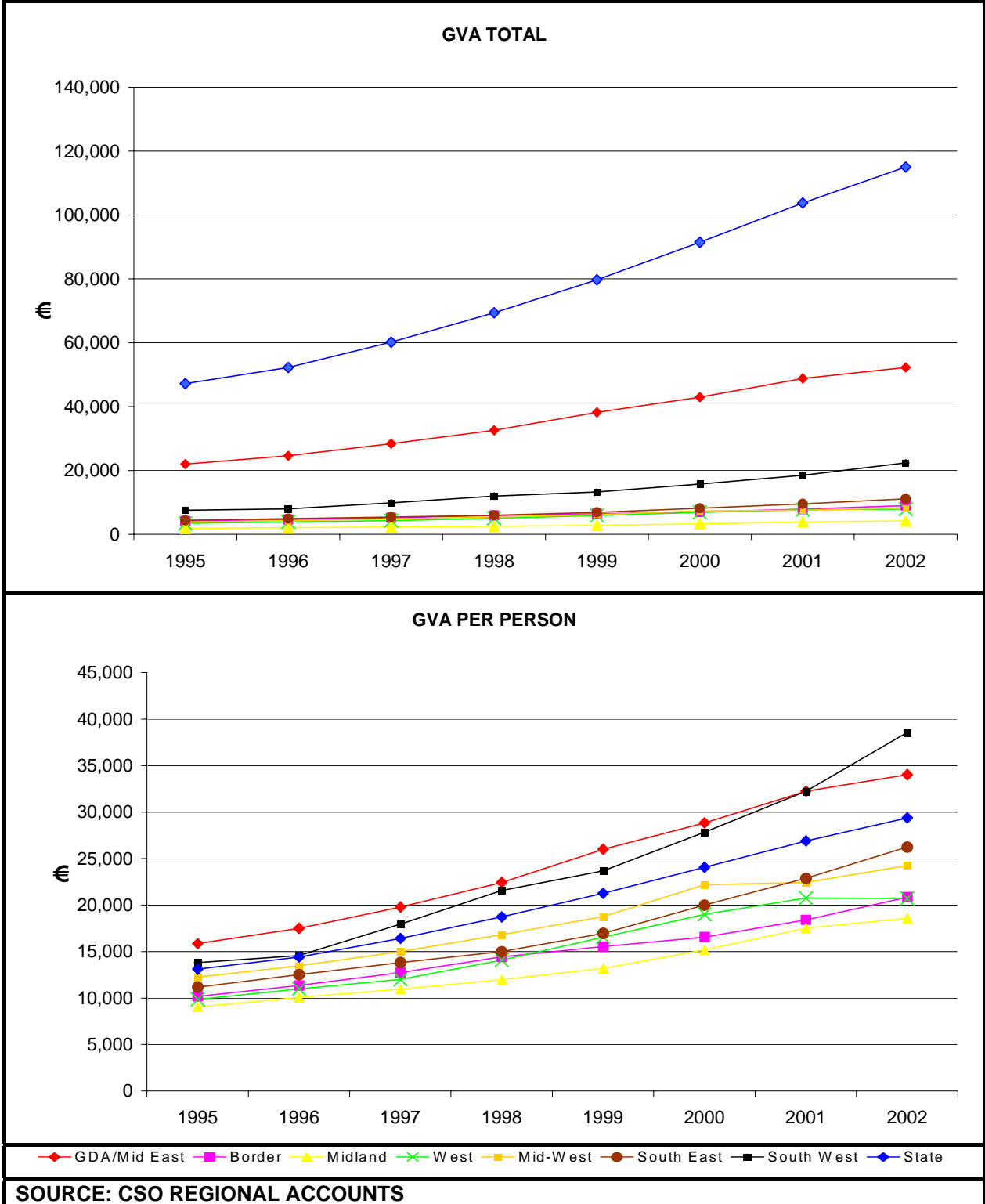
SOURCE: CENSUS OF POPULATION, 2002, 1996; CSO COUNTY INCOMES & REGIONAL GDP 2002

A relationship between the overall urban share of total population and economic growth is evident. On a relative basis, the urbanised regions (GDA, South-West, South-East) were fast-growing over the 1996-2002 period, while less urbanised ones (Border, Midland, West) grew relatively more slowly,



albeit still rapidly by international standards. An exception is the relatively urbanised Mid-West which did not grow rapidly.

FIGURE 2.2: REGIONAL TRENDS IN GROSS VALUE ADDED, 1995-2002





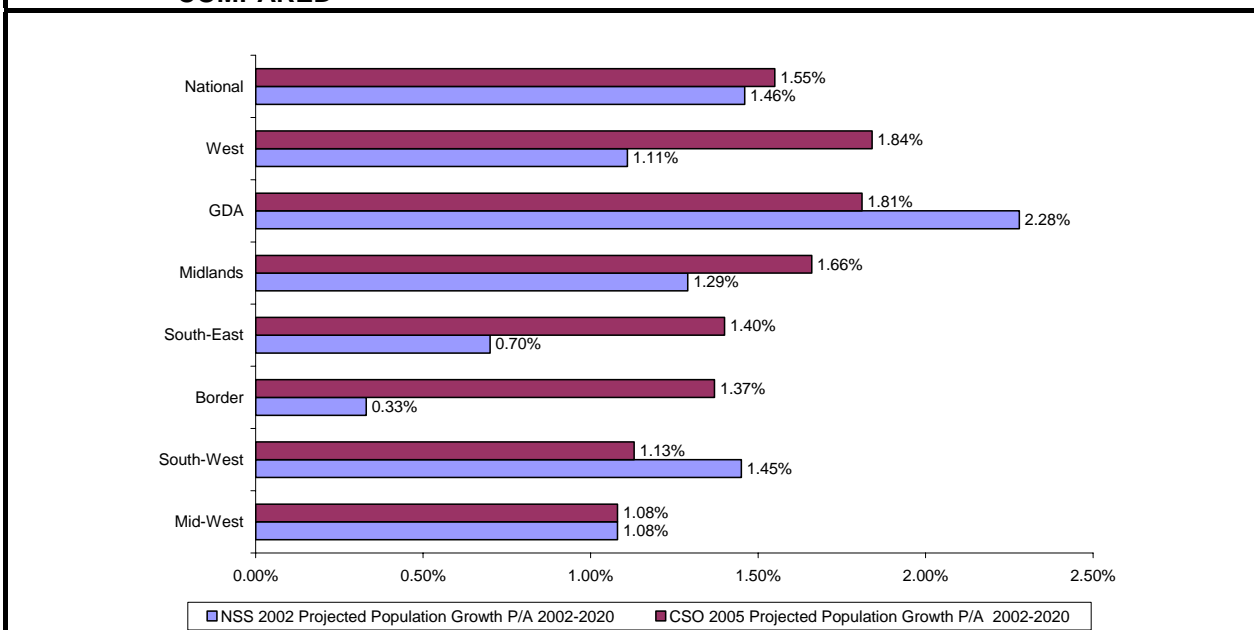
Also, regions with larger and dynamic urban centres grew relatively fast economically. The South-West, the GDA, and the West all did so, while the Midland and the Border (with few large urban centres) grew more slowly. Here the South-East is the exception, with rapid economic growth although Waterford’s share of population is not dominant (reflecting the role of other large centres in that region such as Kilkenny, Carlow and Wexford).

Regional output and population growth are also closely related, but with two exceptions. In the Midland, the spill-over effect of the GDA (demographically but not economically) would explain faster population than output growth. In other words, new populations in the east of the Midland region live there but work (i.e. produce) in the GDA. In contrast, the South-West has grown faster economically than demographically – the latter boosted by the Cork-based pharmaceutical industry. These trends are reflected in trends in regional output per capita over the period (see Figure 2.2).

2.3.2 Demographic Outlook

Underlying the NSS is the view that future population and economic activity growth needs to be more balanced across Ireland, and that a greater **share** of future growth should occur outside Dublin.

FIGURE 2.3: REGIONAL POPULATION PROJECTIONS, ORIGINAL NSS AND RECENT CSO COMPARED



SOURCE: NSS, CSO

The NSS prepared population projections for the then five Gateways, i.e. Dublin, Cork, Limerick, Galway and Waterford, with scenarios based on both current trends at the time of preparation and on more proactive NSS-based policies. Since that time the CSO has also produced up-to-date projections based on recent actual trends. Figure 2.3 compares the NSS projections, i.e. projections affected by NSS policies up to 2020 (blue bars) with most recent CSO projections for the same period (burgundy bars). This comparison shows a number of things:



- Overall national population growth is now running at the higher end of the range of population growth scenarios that the NSS envisaged. This creates both an opportunity for more rapid growth elsewhere, without this being at the expense of Dublin, and also a challenge for the other Gateway locations to manage rapid growth and achieve the necessary critical mass where this does not already exist;
- Population growth in the Mid-West and South-West regions is projected by the CSO to be either under NSS projections or broadly in line with their lower-end scenarios, which is somewhat surprising given the presence of cities such as Limerick and Cork at the heart of these regions.

Both the need and the opportunity for expanding the Gateways in a planned and deliberate manner is thus evident, even more so than at the time of NSS preparation. Chapter 3 now considers the individual Gateways' capacity to respond to this challenge and actions needed to improve it.



3

Gateways: Progress, Prospects and Priorities



Gateways: Progress, Prospects and Priorities

Key Messages

Cork

Cork is the second city of Ireland. Its strengths include its status as the largest city in the Republic of Ireland outside of Dublin and its scale (which is equivalent to the combined populations of the other regional cities of Galway, Limerick and Waterford), a strong economic base with extensive FDI in dynamic sectors such as ICT and pharmaceuticals, a tradition of good strategic land use planning, a large hinterland and an outstanding natural setting. Development challenges include relatively low levels of population growth, especially in the city area, and a need to renew much of its urban fabric. Short-term priorities include investment in RTDI through the third-level institutions, extensive urban renewal including the city centre and docklands, developing an integrated public transport system, and investing in further cultural and recreational amenities.

Dublin

Dublin is the national capital and Ireland's principal international Gateway. It is unique in Ireland in terms of its nature and scale. It is thus the major national Gateway and the location of key national infrastructures such as Dublin Airport and Dublin Port. The Gateway's strengths include its dynamism, its unique role, and its international reputation. Weaknesses include the challenges of recent growth including a rising cost base, traffic congestion, and a high reliance on car transport and long distance commuting. The key requirements will be implementation of the transport infrastructure under the 'TRANSPORT 21' Strategy¹⁷ and on-going improvements in other physical infrastructure, combining this with integrated land use planning, continued investment in internationally-competitive enterprise and supporting assets, quality social amenities and enhancements to the area's third-level institutions and RTDI capability.

Dundalk

Dundalk is located mid-way along the Dublin-Belfast corridor. Strengths include this strategic location and associated availability of a range of high quality infrastructure such as motorway (M1), airport and port access as well as gas pipeline, broadband and electricity networks. The main development challenge is in strengthening and broadening the local economic and enterprise structure, reflecting both a legacy of its earlier status as a border town and more recent difficulties in some of its larger established firms. Short-term investment priorities include modernisation of its enterprise base, improved transport services, investment in cultural and recreational facilities, and community development and renewal of social housing areas to tackle lingering high unemployment and social inclusion issues.

Galway

Galway has been Ireland's Gateway "success story" of the 1980s and 1990s. Its population, currently about 75,000, grew by 17% between 1996 and 2002, the highest of any Gateway other than Letterkenny. The city's strengths are its long established reputation for growth and vibrancy, its third-level education facilities, its existing enterprise base, its strong tourism industry, and its generally attractive location and quality of life. Development challenges include maintaining the quality of life and competitiveness in the light of its success, notably in the areas of tackling traffic congestion, urban planning and renewing the city centre. Short-term investment priorities include strategic urban transport routes to open up access by car and bus-based public transport to large tracts of development lands (including the Ardaun Corridor). Further investment in water services infrastructure, social and community facilities, and protection of the natural and built heritage is also needed.

¹⁷ 'TRANSPORT 21 Strategy', Department of Transport, November 2005



Letterkenny

Letterkenny is the designated Gateway in the North-West, linked with Derry in Northern Ireland. The town itself is relatively small (15,000) but has a rapidly growing population, an expanding retail and local services sector, an extensive and diversified local enterprise base, and a wide hinterland. Development challenges include operationalising the links with Derry including the development of an integrated approach providing physical and social infrastructure, recognising the potential for extensive synergies between Letterkenny and Derry, and overcoming other locational challenges in terms of access by road, air, public transport and energy/communications grids. Short-term investment priorities include investment in improved water service capacity, upgrading of the road network and improving electricity supply.

Limerick-Shannon

Limerick-Shannon is Ireland's largest urban centre after Dublin and Cork. It also benefits from Shannon Airport as the second largest airport. Development challenges include diversifying an enterprise manufacturing base (part of which may be under threat from lower-cost competition), the recent image of Limerick City, strengthening relationships between local authorities in the region and co-operation across administrative boundaries, and adjusting to the impending end of the obligatory "Shannon stop-over". Short-term investment priorities include Phase II of the Southern Ring Road (including the Shannon Tunnel), improved public transport linkages and targeted urban renewal.

Midland Gateway

This is the most innovative as well as the most challenging of the Gateways. It is also the Gateway most likely to take time to be fully realised. Strengths include its strategic location in the centre of the country, its relative proximity to Dublin and the east coast, population and economic centres and facilities, and a high quality of life within the three towns that make up the Gateway. Development challenges include the relatively small size and the absence of a history of co-operation between its constituent towns. Short-term needs include developing and branding the Gateway concept, development of road and public transport links between the towns, and operationalising the concept in terms of an appropriate and agreed planning and development strategy.

Sligo

Sligo is a relatively small Gateway in the North-West, but with a population of 20,000 people, it is by far the largest centre in the area. Strengths include a scenic hinterland, recent completion of a long-awaited inner relief road, and burgeoning private investment. Development challenges include difficulties in attracting major mobile investment and an associated need to capitalise economically on other potential assets. Short-term investment priorities include key local link roads, urban renewal, sports amenity and cultural investment, and investment in RTDI (including *inter alia* in the Institute of Technology).

Waterford

Waterford is the principal city in, and the designated Gateway, for the South-East region. Its strengths include a strategic location, proximity to a major national port, a compact city with a high quality urban fabric and an outstanding estuarine setting, and a fast developing retail and local services sector. Development challenges include the proximity of Waterford to other relatively large centres in the same region and improving of access and developing a co-ordinated approach to the development of the various parts of the city and its environs, which cross local authority boundaries. A good deal of the city's priority investment requirements are, however, on-going in various ways, including improved rail services to Dublin and the M/N9 motorway/dual carriageway. Other key investment priorities include urban renewal, notably the North Quays, completion of the N9 and N25 bypass, and further development of WIT as a generator of RTDI in the region.



Note on Source of Priorities

Gateway-specific priorities listed in this chapter have been based principally on responses from the relevant City or County Managers and IDA Ireland and Enterprise Ireland Regional Managers to a request to identify their priority investments, and also from an examination of Regional Planning Guidelines and agency regional strategies. In each case the managers were encouraged to consult locally with other relevant stakeholders. The resulting proposed priorities were screened by the consultants, in consultation with the clients, in terms of NSS and NDP relevance and gaps involving other more generic needs.

3.1 Cork

Overview

Cork is the second city in the Republic of Ireland and the predominant centre of the South-West region. The City and its immediate environs had a population of 186,177 in 2002, of which 123,062 was located within the City area¹⁸. Between 1996 and 2002 the wider area grew by a relatively low 3%, whilst the City area fell by the same amount. It is the largest city outside of Dublin with a population equivalent to the combined populations of the other regional cities of Galway, Limerick and Waterford. However, there is a sense that Cork's recent demographic growth has not fully matched both its national and regional status and its potential.

Cork has a strong economic base with extensive FDI in dynamic sectors such as ICT and pharmaceuticals, a tradition of good strategic land use planning, a large hinterland extending over much of Munster, and an outstanding natural setting.

The NSS identifies Cork as a key national Gateway. The city's future development will be facilitated in the context of the integrated land use and transportation framework set out in the Cork Area Strategic Plan 2001-2020 (CASP)¹⁹.

Economic Infrastructure

- Cork has national primary road connections to Dublin (N/M8), Limerick (N20) and Waterford (N25). Upgrading of these road corridors has been ongoing and it is anticipated that the M8 should be completed by 2010 ('TRANSPORT 21' date).
- The rail service between Cork and Dublin has improved steadily in recent years and a new fleet of trains will be used to introduce an accelerated hourly service between Cork and Dublin by 2007. A

¹⁸ Central Statistics Office (CSO) 2002.

¹⁹ Cork Area Strategic Plan 2001-2010, Cork City Council, Cork County Council, 2001.



new suburban rail service is also due to commence in 2008 with the re-opening of the Midleton rail line and new local stations on the Mallow-Cork-Cobh line (see map).

- Cork Airport, located to the south of the city, serves Dublin, the UK and Europe. Plans are in place to develop new routes and double passenger throughput – a new terminal opened in 2006.
- Cork Port (including Ringaskiddy deep-water berths) is one of the most important economic drivers in the region and is also a nationally significant freight and ferry port with connections to the UK and continent.

Cork Commuter Rail



Enterprise and Economy

- Cork has high employment in the wholesale and retail sector (39% of private sector employees) with market services following at 23%. The manufacturing sector has 22% of employees within Cork²⁰.
- Cork has an international status as a Centre of Excellence in pharmaceuticals and ICT, with eight of the ten top global pharmaceutical companies based there, e.g. GlaxoSmithKlein, Pfizer, Novartis, Johnson & Johnson. Cork is also home to a number of key multinationals in the ICT sector, such as Siemens and Motorola.
- Cork has significant potential as a tourism destination and could build on its European City of Culture (2005) status to take advantage of trends toward city breaks, which to date in Ireland have primarily been to Dublin only.
- Cork has a number of business and technology parks, e.g. National Software Centre Campus, and benefits from significant investment from the private sector in high quality parks such as Airport and Eastgate Business Parks.



Labour Force, Skills and Innovation

- In the South-West region as a whole, 30% of the workforce has completed third-level education²¹. This is in line with the national average.
- Service sector and professional employment for the South-West is concentrated in Cork City.
- Cork is a university city with over 18,000 full-time third-level students (the second largest in Ireland, after Dublin) in two major third-level institutions – University College Cork and Cork Institute of Technology.
- There are a number of major RTDI assets. Tyndall Research Centre (formerly the National Microelectronics Research Centre) for example engages over 200 researchers focusing on the areas of ICT, photonics, nanotechnology and microtechnology, and offers a wide range of industry support services.

Quality of Life

- Cork was the European Capital of Culture for 2005 and hosts world renowned annual festivals, e.g. Cork Jazz Festival, Cork International Choral Festival and a number of internationally important sailing festivals.
- There is an extensive network of social and cultural facilities in Cork such as the Crawford Gallery, Cork Opera House, Cork School of Music, the Cork Vision Centre and museums, which provide a base from which to further develop Cork's strong arts and cultural activity base.
- The broad range of other social, cultural, sporting and entertainment facilities in Cork, including the regional hospital, third-level educational facilities and Fota Island Wildlife Park, provides the city and its environs with the widest range of facilities in the Republic outside of the Dublin area.

Local Capacity and Leadership

- CASP is the driving document for regional development in the Cork area and represents good practice in long-term strategic planning. Furthermore, there are resources dedicated to its implementation, including an implementation team and project officer.
- There is significant co-operation between the City and County Councils, e.g. CASP, the Cork Strategic Retail Strategy, the Joint Housing Strategy.
- A mechanism is required to co-ordinate the involvement of a range of utility providers (including ESB, Bord Gais, and the NRA), together with the local authorities and the development agencies to develop business and technology parks and serviced sites for future potential inward investment to the Cork Gateway.

Short-term Investment Priorities (3-5 years)

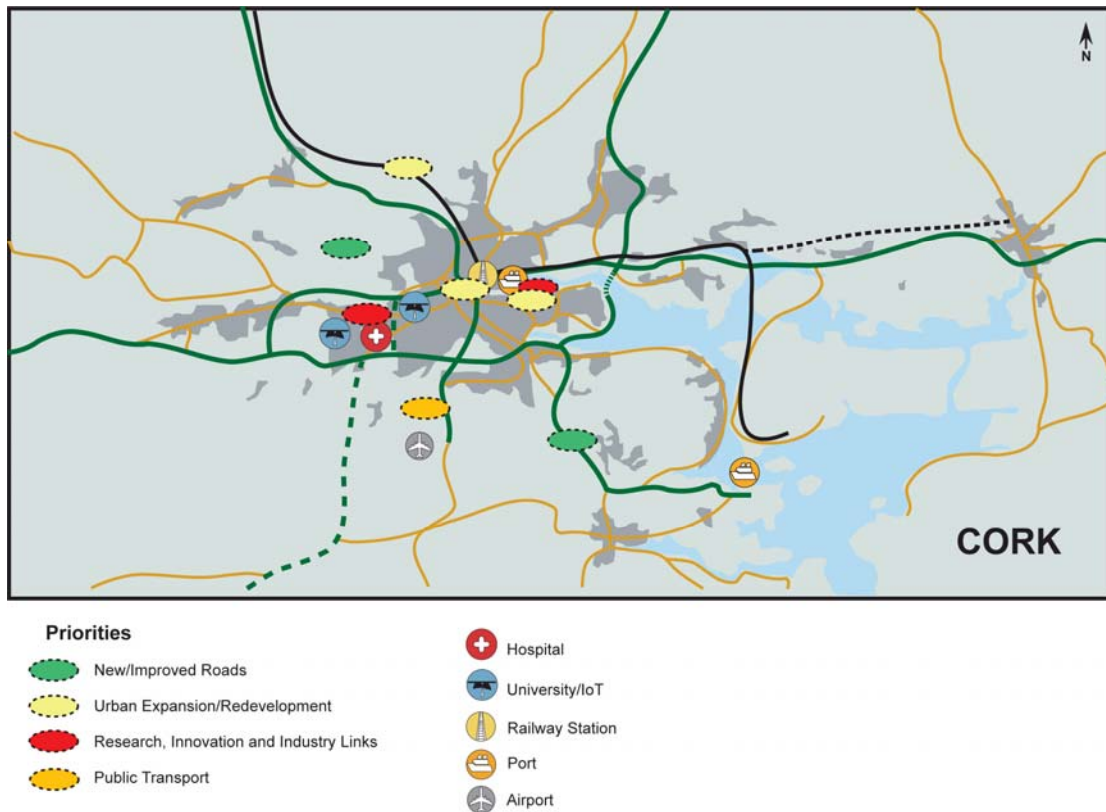
Short-term investment priorities have been identified on the premise that their implementation would represent 'quick wins' and would unlock the potential for accelerated growth of the Gateway and the

²⁰ Source: Irish Database Systems

²¹ PACEC Economic Consultants; CSO, 2002.



region²². Items have not been included where implementation is already underway. They are not listed in order of priority. Where appropriate, priorities with a spatial dimension are indicated on the accompanying map.



1. The further **development and facilitation of research and development innovation** in Cork, building on its pharmaceutical and ICT Centres of Excellence including the development of the city's *Knowledge Zone*²³ (a research facility mooted for the Docklands area);
2. Further improvements to the **quality and amenity of the urban fabric** in order to strengthen the retail offer of the city centre and to consolidate its role as the primary retail location in Munster. The recent upgrade of Patrick Street is an excellent example of such a scheme;
3. Focussed investment into and regeneration of the **Cork Docklands** in order to attract key users to the expanded city centre, led by the Docklands Development Strategy²⁴;
4. Build on momentum of the European City of Culture and international status of festival events to develop and strengthen the **cultural and recreational offer** of Cork for visitors and residents;
5. Development of **improved links to Cork Airport**, including a bus corridor as part of an **integrated public transport system**;

²² See note in Section 1.3 concerning the source of priorities.

²³ 'The Proposed Strategy', Chapter 2, pg. 56, CASP, 2001.

²⁴ 'The Docklands Development Strategy, 2001, Cork Corporation.



6. The upgrading of **N28 to Ringaskiddy Port** and industrial area is at route planning stage and is included in *Transport 21* for implementation post 2010. It is listed because it is considered a key infrastructural requirement to serve enterprise needs in the area;
7. The construction of the **North Ring Road** will facilitate the further development of the north of the city, encourage FDI (in particular to the IDA Business Park in Kilbarry), open further lands for development (including the Monard area identified in CASP), and complement the commuter rail proposals.

Short-term Investment Priorities: Challenges and Barriers

Research, Development and Innovation

- The slow rate of progress in the development of indigenous Small and Medium Enterprises (SMEs), on foot of research and development carried out at the universities, has been identified as a weakness by key stakeholders in Cork.
- A Regional Data Centre is identified by IDA Ireland as attractive to FDI that is looking for an alternative option to Dublin, particularly given the existing strong pool of ICT companies and presence of the Tyndall Institute. One of the key reasons Google and Ebay located in Dublin was the presence of data centre facilities.

Urban Environment

- Need for dedicated national level financial supports and measures, including local development contributions, to facilitate investment in the new development areas identified under CASP²⁵, particularly in the northern and eastern part of the Metropolitan Area and in the ring towns around the city, i.e. Mallow, etc.

Cork Docklands

- The process of urban regeneration and brownfield development in the Docklands is likely to be challenging and needs to be supported through targeted investments in new local infrastructure such as roads, piped services and an access bridge.
- Existing tax incentive mechanisms are due to expire at the end of 2006. Continued development incentives could have a key role in promoting the development of areas such as the Cork Docklands.

Cultural and Recreation Product

- The availability of local funding for cultural investment is always a challenge and is usually limited.
- Responsibilities for providing support for cultural or recreational initiatives are spread across

²⁵ Part A, Chapter 2, CASP 2001



departments, causing delays in progressing decisions and funding allocations, and in some cases there are no dedicated funding lines apparent.

Longer-term Priorities

Certain longer-term issues were highlighted by the local authorities and the enterprise development agencies during the course of the study. Although the impact of these issues may be long-term, certain actions must be taken now to put supporting initiatives in place. Such longer-term priorities include:

- Upgrading of the N20 to Limerick;
- Upgrading of the N22 linking the Cork Gateway with the Tralee-Killarney Hub;
- Improving collaboration and interaction between the Atlantic Gateways of Cork, Galway, Limerick/Shannon and Waterford in developing a Metropolitan Corridor along the west and south coasts as a complement to the emerging Dublin-Belfast Corridor on the east coast.

3.2 Dublin

Overview

Dublin is the international Gateway to Ireland, the capital city and the largest urban area. The Dublin Gateway embraces the city and county of Dublin, together with parts of the surrounding counties of Meath, Kildare and Wicklow, and currently has a population well in excess of one million, including a considerable number of in-migrants. It is a major port and contains the country’s largest and busiest airport. The Greater Dublin Area (GDA) contains four universities, together with the Dublin Institute of Technology and other major third-level institutions.

The Dublin Gateway is thus, in terms of scale and national and international significance, on a different level to that of the other Gateways.

Dublin spearheaded the growth of the Irish economy – the Celtic Tiger – notwithstanding a number of substantial difficulties and shortcomings. Among the factors that have contributed to its recent success are the development of the International Financial Services Centre (IFSC) and the wider Docklands regeneration, a resurgence in urban tourism, the strong performance of its universities and related R&D facilities, the further development of its high-tech employment base, and a strong cultural sector.

The rapid expansion in the performance of Dublin has occurred despite significant infrastructural constraints, especially in respect of the transportation system. The challenges of recent growth have also included a rising cost base, major increases in the cost of housing, traffic congestion and high reliance on car transport and long distance commuting.



The NSS²⁶ recognises the international and national economic importance of Dublin and the need to enhance its competitiveness. The Strategy envisages the continued development of the GDA but also emphasises the need to consolidate development into the Metropolitan Area and the designated development centres in its hinterland (as identified in the Regional Planning Guidelines²⁷).

The planning frameworks, including the Regional Planning Guidelines and the individual Development Plans of the local authorities, also identify the need for a significantly improved public transportation network to facilitate the consolidation of development and to reduce dependence on the use of the private car.

As the principal driver of national economic growth, it is important to maintain the effectiveness and competitiveness of Dublin into the future. Moreover, by international standards, Dublin is relatively modest in size and is thus constantly challenged by larger, more centrally located Gateway cities overseas.

Because the city and its region constitute such a large proportion of the national economy, any significant downturn in its fortunes would affect not only its international standing but the overall performance of the country and thus the success of the other Gateways.

Economic Infrastructure

- Dublin is the hub of the traditional radial transportation system of the country, both road and rail. Many major improvements to these radial routes, linking Dublin with the other Gateways, have been completed and many more are in various stages of planning and construction.
- The need for major improvements to the public transport system of Dublin has been long recognised. Some significant improvements have already taken place, including the expansion and modernisation of bus services, increased capacity on DART and the opening of two Luas light rail lines.
- The programme in *TRANSPORT 21* includes further major improvements in the radial road and inter-city rail networks serving Dublin, as well as major investment in public transport on both radial and orbital routes, with a strong emphasis on rail (Commuter, DART, Metro, Luas) and bus services.
- The further development of Dublin Airport to meet ever increasing demand is planned through the provision of a second east-west runway and a second terminal. *TRANSPORT 21* includes a proposed Metro link to Swords, serving the airport.
- The opening of the Port Tunnel in 2006 will enhance the efficiency of the port and facilitate its on-going development, as well as improving traffic and environmental conditions in the city centre.
- The further development of water supply, wastewater collection and treatment, and waste disposal infrastructure will be required to meet the future needs of the GDA. Similarly, the energy and

²⁶ National Spatial Strategy, 2002 – 2020, Department of the Environment, Heritage & Local Government

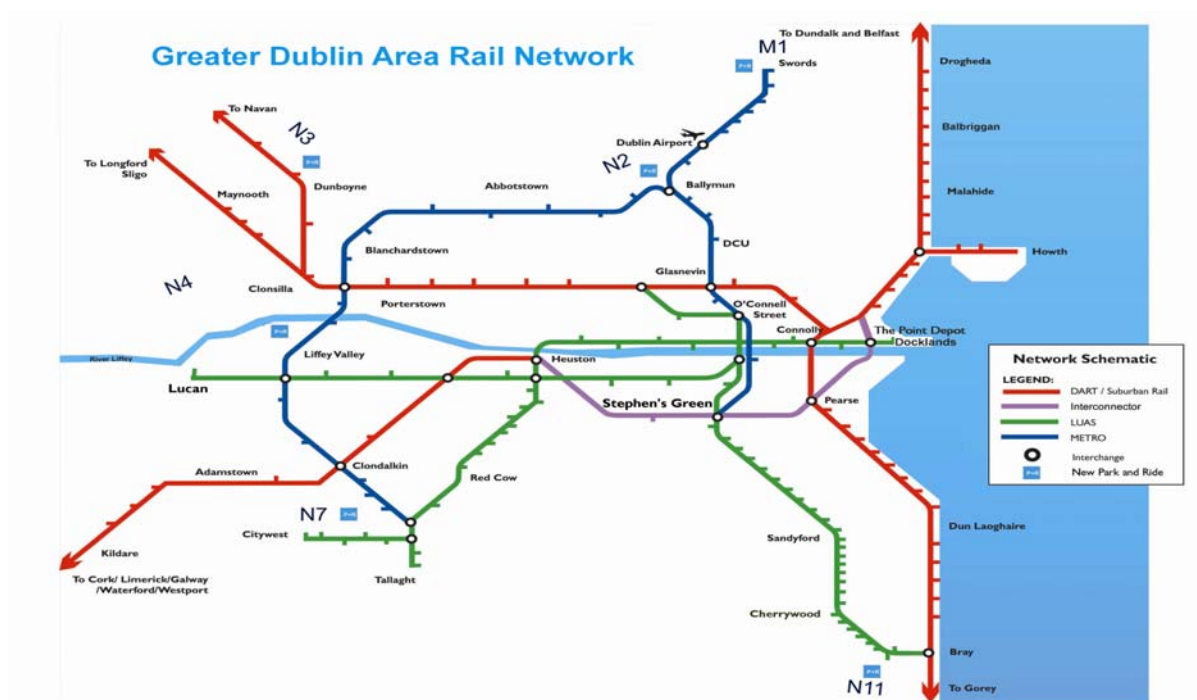
²⁷ Regional Planning Guidelines for the Greater Dublin Area, 2004 – 2016, Dublin & Mid East Regional Authorities.



telecommunications networks will require on-going enhancement, including addressing the emerging deficit in electricity supply.

Enterprise and Economy

- The economic structure of the GDA is dominated by service and higher order functions with a significant manufacturing presence. The ICT, biopharmaceuticals and internationally traded financial services sectors are well-represented.
- Tourism is a significant industry, with Dublin one of the most popular short-break destinations in Europe.
- Dublin’s international attractiveness is important to Ireland’s ability to attract FDI.



Labour Force, Skills and Innovation

- With a population well in excess of one million, the Dublin Gateway has the largest labour force in the country, with half a million in the GDA.
- The market services sector represents 46.3% of private sector employees in the GDA, with wholesale and retail following at 17.4%²⁸.
- Some 26% of the workforce in the GDA has completed third-level education (12% in science)²⁹.
- Approximately 59% of full-time students in the State study in Dublin.
- There is strong R&D activity in the GDA, reflecting the presence of both major third-level institutions and major multi-national companies.

Quality of Life

²⁸ Irish Database Systems (IDS)

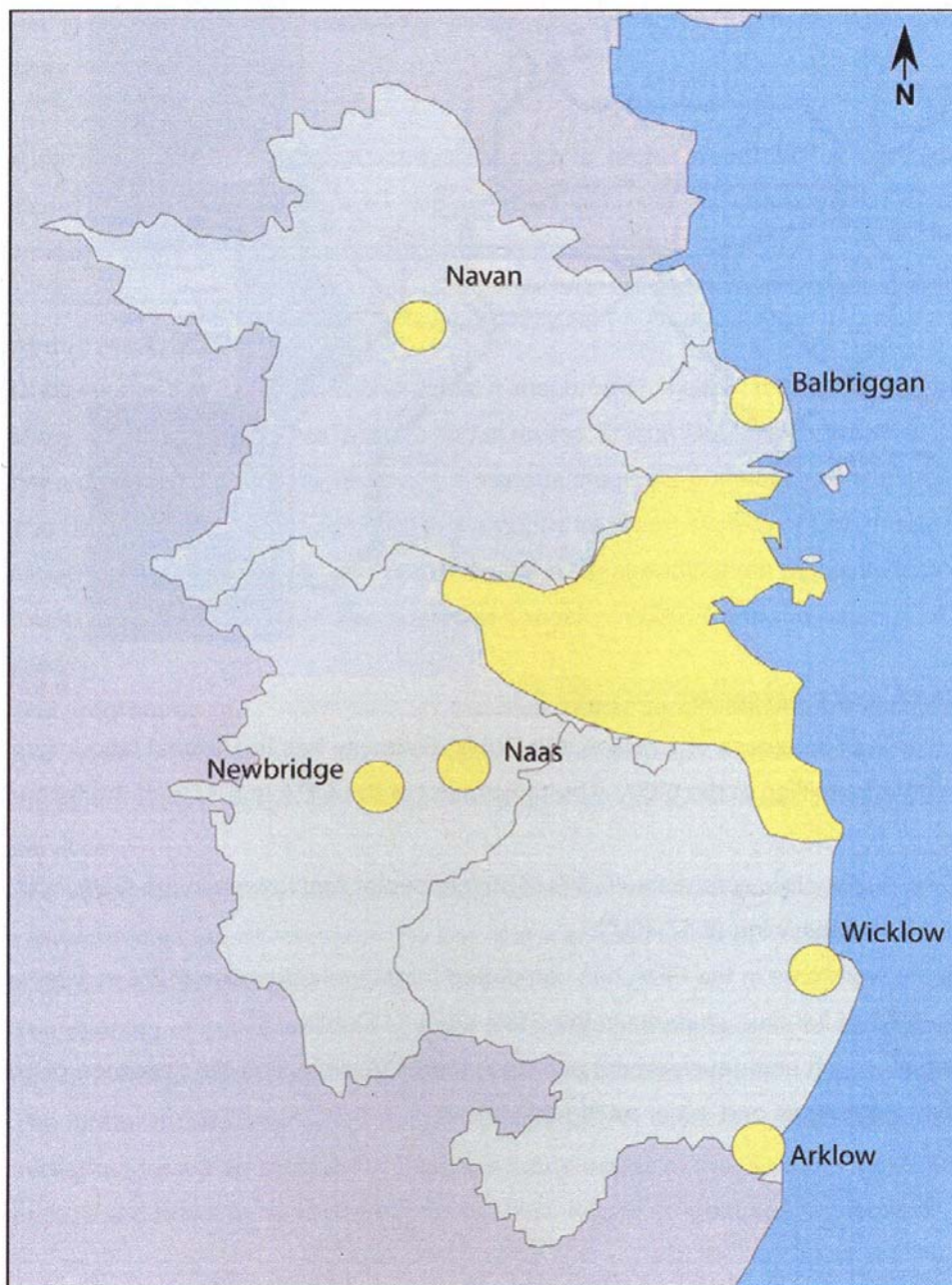
²⁹ PACEC Economic Consultants; CSO 2002.



- Dublin, as the national capital, has an excellent range of cultural and leisure facilities that enhance the quality of life of residents and attract tourists. There are plans to develop a major conference centre.
- Commuting times and traffic congestion remain significant quality of life issues in the GDA.

Local Capacity and Leadership

- The local authorities in the GDA have a well-established working relationship, with a number of bodies in place to integrate administration, including the Dublin and Mid-East Regional Authorities, the Dublin Transportation Office, etc.



 Urban Expansion/Redevelopment



Investment Priorities

The investment priorities of the Greater Dublin Area, such as its transport infrastructure, have been well-documented³⁰ and are being addressed through studies, plans and implementation actions, some of which have been outlined above. The key priorities are listed below, but not in order of priority, and the broad spatial strategy for the GDA is illustrated on the diagram.

- Full implementation of the **TRANSPORT 21 programme**, including the provision of a fully integrated, effective and efficient public transport system;
- The **consolidation of development** into the Metropolitan Area and the designated development centres, integrated with the public transport system;
- The achievement of **balanced development** as between the Metropolitan and Hinterland parts of the GDA;
- The need to continuously improve **and enhance the quality of design**, both of buildings and the public realm, and the continued **provision of social amenities** as a contribution to improving quality of life;
- Resolution of the medium-to-long-term **water supply and wastewater infrastructure** requirements;
- **Resolution** of the emerging **energy deficit** and further strengthening of the city's **broadband accessibility**;
- The **strengthening** of the international status of the area's **third-level institutions and of RTDI capability**;
- **Continued investment** in internationally-competitive enterprise.

3.3 Dundalk

Overview

Dundalk is located between the key cities of Dublin and Belfast. It benefits from a resulting high quality of infrastructure by Irish standards, including motorway (M1), airport and port access as well as gas pipeline, broadband and electricity networks. In overall terms, it has good national and international physical and electronic access. Dundalk also has easy access to a wide range of third-level institutions, both in the Republic and Northern Ireland, and access to a qualified labour pool.

Dundalk and its immediate environs had a population of 32,500 in 2002, up by nearly 8% since 1996. The town is currently exploring the potential for co-operative planning and development through linkages with Newry. The current position in Dundalk is set out below under five key Gateway characteristics.

Economic Infrastructure

- The recently completed M1 from Dundalk to Dublin has significantly enhanced access to this Gateway, whilst the upgrade of the road from Dundalk to Newry commenced in 2005.

³⁰ e.g. 'Platform for Change', Dublin Transportation Office



- Iarnród Éireann is undertaking capacity upgrade works which will increase the daily capacity of the suburban rail network and enhance the public transport position of Dundalk.
- Both Dublin and Belfast airports are within a relatively short distance of Dundalk and provide the island's main national and international services.
- Dundalk has access to a variety of ports including Dundalk, Greenore, Drogheda, Dublin, Belfast and Larne.
- High speed broadband telecommunications infrastructure is in place.
- IDA's development of Finnabair Office Park is underway, which will provide advance high quality office space. IDA has a 30 hectare site at Mullagharlin available for immediate development. A number of business parks are also being provided by the private sector and on the campus of Dundalk Institute of Technology (DKIT).
- There is evidence of high levels of recent private investment, particularly in hotels, retail development and leisure/amenities such as the JJB Sports Dome.
- Energy supply will need to be increased if future industry needs are to be adequately accommodated. Acceleration of the ESB national grid plans to increase the power supply to the North-East is essential, as is the resolution of connection issues relating to the new North/South gas inter-connector in close proximity to Dundalk.

Enterprise and Economy

- Dundalk's economy is weak relative to the national situation, and unemployment is high by national standards. It has a relatively heavy reliance on more traditional sectors, which are vulnerable to lower cost competition, together with lingering economic effects of its border location during the 'Troubles'.
- The manufacturing sector is the key employer (concentrated primarily on the ICT sector) in Dundalk. Key companies include ABB, Xerox, Heinz and Moffett Engineering. There have been recent investments in internationally traded services activities including Vodafone and Irish Life Financial Services, which have customer support services operations there.
- Dundalk has a concentration of firms in transport and communications, possibly reflecting its location, its transport infrastructure and the relatively good access to Dublin and Belfast.

Labour Force, Skills and Innovation

- Dundalk has high employment in the wholesale and retail sector (28% of private sector employees) with the manufacturing sector following at 26%. The market services sector employs 25% of employees within Dundalk³¹.
- In the overall Border region, 25% of the workforce has completed third-level education (9% in science), significantly below the national average of 30%³².

³¹ Irish Database Systems

³² PACEC Economic Consultants: CSO 2002.



- The DKIT had 2,624 full-time, and approximately 1,500 part-time students in 2004, with a strong capability in nursing/healthcare and in environmental studies. It also has strong links with the University of Ulster and with Queens University and Dundalk is also within easy reach of third-level institutions in the Dublin Area.

Quality of Life

- There are a range of leisure facilities in place including public parks and leisure complexes and Dundalk has proximity to scenic areas and seaside resorts. Additional sporting and recreational facilities are coming on stream, including a 'soccer dome', and an all weather racing track.
- However, the image and brand of Dundalk could be strengthened in order to attract further investment and benefit from its Gateway status.

Local Capacity and Leadership

- Statutory development plans, grounded in the NSS and RPGs are in place such as the Dundalk Western Environs Local Area Plan. The focus of the Dundalk plan is to facilitate additional growth arising from NSS designation, and to act as a driver for development in the north-east of the country and the wider region.
- There are a number of local agencies in Dundalk focused on its development, including the Dundalk Economic Development Group, the Louth Local Authorities Gateways Forum and the County Development Board.

Short-term Investment Priorities (3-5 years)

Short-term investment priorities have been identified on the premise that their implementation would represent 'quick wins' and would unlock the potential for accelerated growth of the Gateway and the region³³. Items have not been included where implementation is already underway. They are not listed in order of priority. Where appropriate, priorities with a spatial dimension are indicated on the accompanying map.

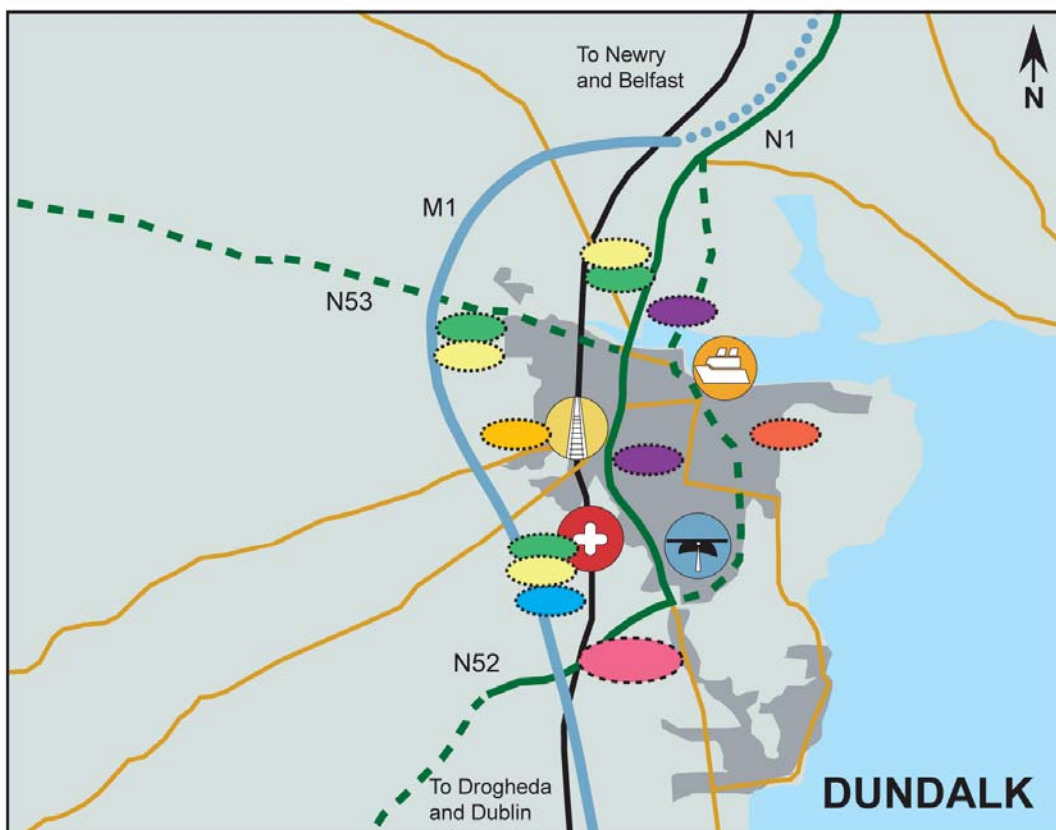
- **Strengthening, broadening and modernisation of the local economic and enterprise structure** with resultant **employment creation** in a variety of sectors. Encouraging FDI. Maximise the development potential of the town through the designation of sites via the Integrated Area Action Plan process for employment uses³⁴ and the development of the IDA lands at Mullagharlin;
- **Local roads and water services**, specifically the provision of infrastructure, including roads and piped services, to open up the western environs to development and to open up access (through the upgrading of the Dundalk/Carrickmacross and Dundalk/Castleblayney roads), the Newry Road to Armagh Road, and Hill Street Bridge;

³³ See note in Section 1.3 concerning the source of priorities.

³⁴ Dundalk and Environs Development Plan 2003 – 2008, Chapter 4, Section 4.5.1.



- **An integrated public transport system needs to be developed** incorporating rail, bus, cycle and pedestrian routes. This may include consideration of a potential new suburban railway station with park-and-ride facilities to serve the developing southern environs of Dundalk;
- **Community development** to tackle continued high levels of social exclusion and accommodate the diverse population in the Gateway, and a programme of **social housing regeneration** in RAPID areas (including Coxes and Muirhevnamore);
- Provision of **recreational, cultural amenities and activities** for a growing population in the Gateway through, for example, the proposed development of the windmill at Seatown and the restoration of a former landfill site adjacent to Castletown River;
- The third-level institutions in the Gateway, jointly with other key stakeholders (enterprise agencies, local authority, other State bodies, business) need to formulate a **shared innovation strategy** for the Gateway and for their respective roles within this.



Priorities

- | | |
|---|---|
|  Employment Creation |  Hospital |
|  New/Improved Roads |  University/IoT |
|  Sanitary Services |  Railway Station |
|  Urban Expansion/Redevelopment |  Port |
|  Public Transport | |
|  Social and Community Development/Facilities | |
|  Culture and Recreation | |



Short-term Investment Priorities – Challenges and Barriers

Employment Creation

- Attraction of FDI to Dundalk is dependent on the current image of the town and facilities, which is coloured by its border location during the ‘Troubles’.

Distributor Routes

- Prospects for central funding appear limited due to resource constraints and lack of an ongoing and specific measure to support such investments.

Regional Sports Facilities/Cultural Facilities

Responsibilities for improving such facilities are spread across departments, causing delays in progressing decisions and funding allocations, and in some cases there are no dedicated funding lines apparent.

Longer-term Issues

Certain longer-term issues were highlighted by the local authorities and the enterprise development agencies during the course of the study. Although the impact of these issues may be long-term in effect, it is recognised that certain actions must be taken now in order to put supporting initiatives in place. Such longer-term priorities include:

- The need to deepen and strengthen the emerging research and innovation capabilities of the Institute of Technology both by linkages to enterprise in the region and by linkages to other third-level institutes such as the University sector.
- Co-ordination between local authorities and the relevant departments and Government agencies in the provision of social infrastructure such as schools, community facilities and amenities as an integral component of the process of developing large new residential areas.
- East-to-west road connectivity to improve access throughout the Border region and between Northern Ireland and the Republic is a long-term priority, particularly the Dundalk-Sligo route through Cavan (which has already been the subject of a feasibility study and has been captured in the Border Regional Authority’s Regional Planning Guidelines³⁵). This initiative will involve co-operation between service providers and the local authorities within the Border region and on both sides of the border.

³⁵ Regional Planning Guidelines for the Border Region, Section 6.2, Pg. 79.



3.4 Galway

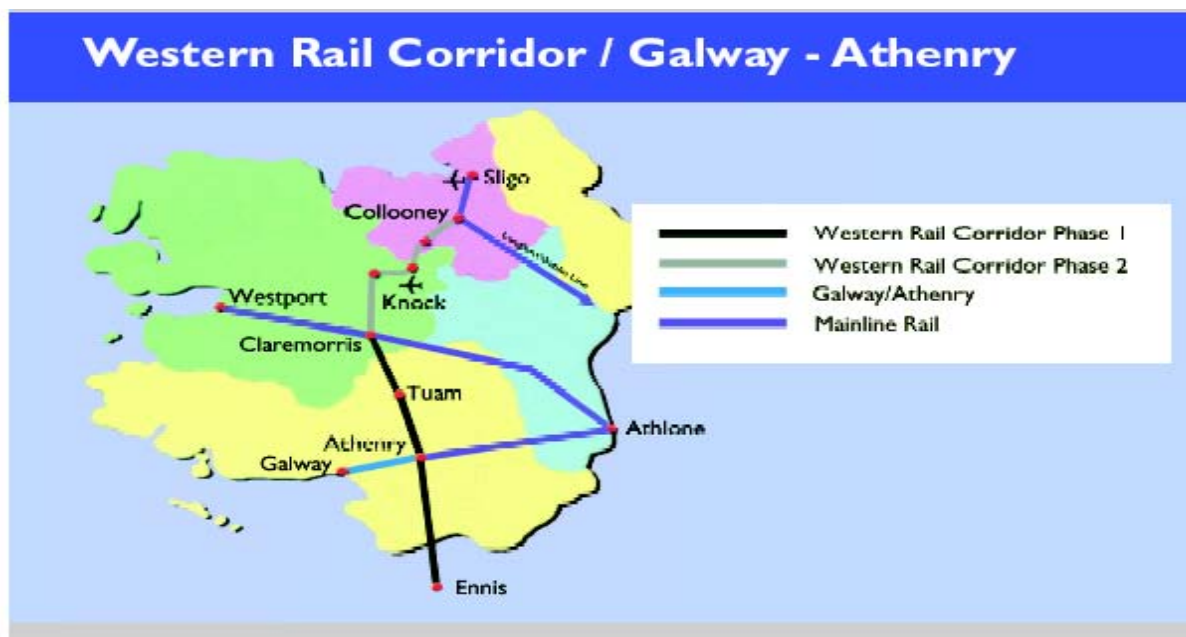
Overview

Galway is a vibrant and dynamic city at an attractive location and with a high quality of life. The city and its environs had a population of about 75,000 in 2002, up by 17% since 1996 – the second highest Gateway growth rate after Letterkenny. Economic and population growth during the 1980s and 1990s make Galway the main Gateway success story of recent decades and, in certain respects, a model for other regional centres outside Dublin.

The NSS envisages Galway continuing as the vital economic driver for the West region, where it is by far the largest urban centre. Galway’s principal development challenge is maintaining its vibrancy and competitiveness in the light of its success, including the tackling of traffic congestion and the achievement of good urban planning. The current position in Galway is set out below under five key Gateway characteristics.

Economic Infrastructure

- Galway is located on a series of national primary routes – N6 to Athlone/Dublin, N17 to Sligo, N18 to Limerick, N59 to Clifden, Westport, and N84 to Castlebar. Access to Galway is set to improve through the delivery of the Galway City Outer By-pass (at design stage), N6 (Galway to East Ballinasloe) (at tender stage), and N18 (Gort to Oranmore) (at planning) schemes. The full Dublin-Galway inter-urban motorway will be complete by 2010.
- A more frequent Dublin-Galway rail service is planned for delivery by 2007, and a new Athenry-Galway commuter service will commence by 2009 under the ‘TRANSPORT 21’ strategy, providing a connection to the Western Rail Corridor (see map), which in turn will facilitate new rail links from Galway to Limerick, Cork and Waterford.
- The regional airport provides daily return flights to Dublin and to major airport hubs in the UK including London, Manchester, Birmingham, Edinburgh and Glasgow. Knock and Shannon airports are also within one hour of Galway.





- The recently installed Galway Metropolitan broadband network extends from Knocknacarra to Oranmore. However, an extension of network provision to include all areas of the city is required.

Enterprise and Economy

- Based on the number of private sector employees, Galway has high employment in the manufacturing sector (33%) with the market services sector following at 28%. The wholesale and retail sector employs 19% of employees within Galway³⁶.
- Enterprise in Galway covers a diverse range of sectors, including medical devices, life sciences, ICT, software and engineering. Key employers include Medtronic, Boston Scientific, Merit Medical, HP and APC.
- Development plans for Ardaun³⁷, on the east of the city, envisages creation of a sustainable living and working environment and an integrated public transport corridor. The development of the Ardaun Corridor will require targeted investment in local roads, water services and amenities/community facilities.
- IDA Ireland has two major Business and Technology Parks in Galway City. The development of the Oranmore-Athenry strategic corridor is also being progressed.
- EI-supported campus incubation units and the Galway Technology Centre are in place. These will be complemented by the 52,000 sq. ft. high-specification accommodation webworks facility that is planned for completion in 2006.
- Proposals for the re-development of the Ceannt Station area and of the Docklands are currently being advanced.
- Galway continues to be a major national and international tourist destination, driving investment and activity within Galway and its wider region.

Labour Force, Skills and Innovation

- In the West region as a whole, 28% of the workforce has completed third-level education (10% in science), just below the national average of 30%³⁸.
- There are two third-level education facilities within the city, the National University of Ireland, Galway (NUIG) and Galway and Mayo Institute of Technology (GMloT), with a large full-time student population of 15,000. These institutions, in all their dimensions, are widely recognised as important ingredients in the “Galway success story”.
- NUIG is expanding rapidly and has strong industry links, currently providing research support to 18 companies on campus and participating in an SME development programme. The Digital Enterprise Research Institute (DERI) was established in 2003, funded by SFI. Its research is focused on web service technologies

³⁶ Irish Database Systems

³⁷ Galway City Council Development Plan, 2005 – 2011, Section 9.5



Quality of Life

- Physically, Galway is attractively located on the Galway Bay coast, and is the Gateway to west Galway, including Connemara. Its urban centre has also been developed as an attractive shopping and entertainment location.
- Galway thus has established a strong image as a regional centre and a quality place to live, work, shop and visit. Its reputation is boosted by a number of major festival events throughout the year within the city and county (e.g. Galway Races, Galway Arts Week, The Oyster Festival).
- There has been recent acquisition of lands for open space and recreational use and investment in their development is now required.

Local Capacity and Leadership

- A Galway Transport and Planning Study (GTPS)³⁹ has been adopted by both Councils to guide and promote a balanced regional settlement pattern, transport policies and the development of the Ardaun Corridor. The study has been incorporated into the relevant Development Plans.
- Local area plans for new development areas such as Ardaun (both city and county areas) and the Murrough area are in the course of preparation.

Short-term Investment Priorities (3-5 years)

Short-term investment priorities have been identified on the premise that their implementation would represent 'quick wins' and would unlock the potential for accelerated growth of the Gateway and the region⁴⁰. Items have not been included where implementation is already underway. They are not listed in order of priority. Where appropriate, priorities with a spatial dimension are indicated on the accompanying map.

1. **Strategic urban transport routes**, including the Galway Outer By-Pass, the N18 link to Shannon and routes to open up access by road (car and bus based local public transport) to large tracts of developable lands (including the Ardaun Corridor), and to accelerate urban development. There is also a need to implement an integrated transportation plan for the city, including bus prioritisation measures and park-and-ride facilities, to tackle the growing problem of congestion and car dependent transportation in the city, including the possible establishment of a joint city-county 'Galway Transportation Office' as proposed by the two Councils;
2. Investment in **sanitary infrastructure**, including the Galway Main Drainage Stage III and the upgrading of water supply, to supplement ongoing projects. Expansion of the city peripheral areas of Oranmore and Barna require investment. Both the main bank of residentially zoned lands in the city and IDA sites require servicing improvements;
3. Provision of **social and community facilities** to include social and affordable housing and the provision of educational and medical facilities in tandem with an increasing population. The

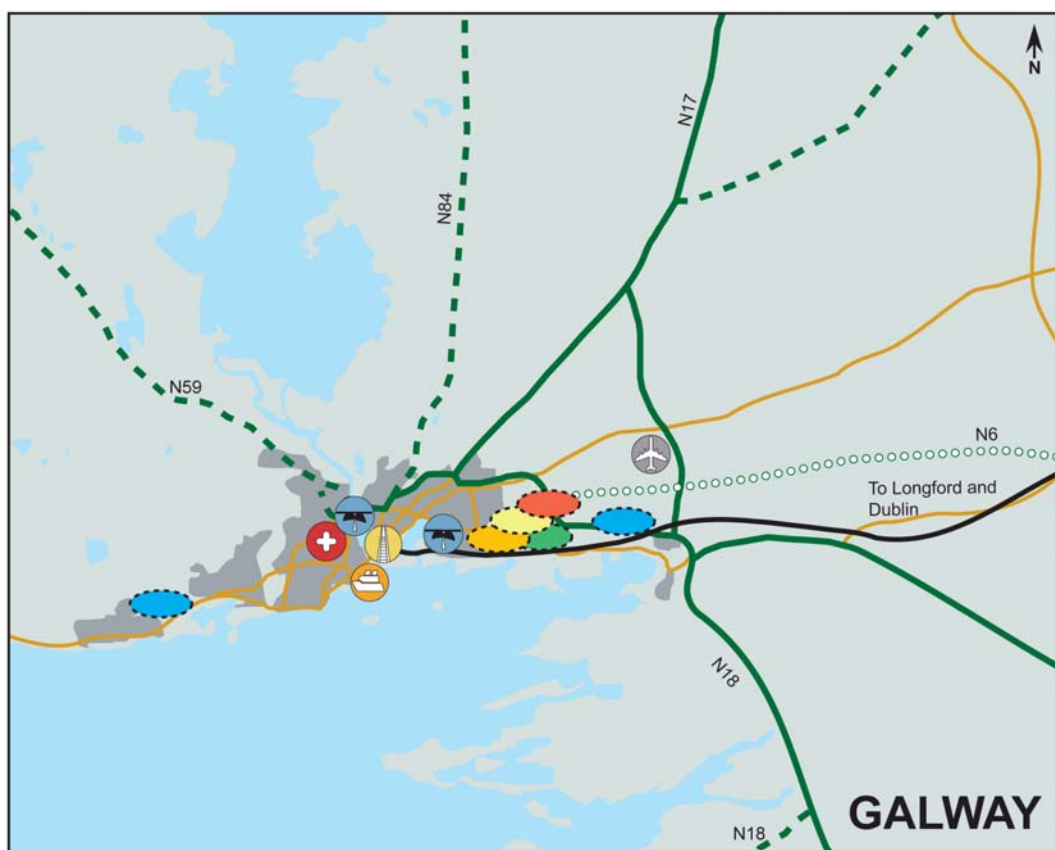
³⁸ PACEC Economic Consultants: CSO, 2002.

³⁹ Galway City Council Development Plan 2005 – 2011, Section 3.2

⁴⁰ See note in Section 1.3 concerning the source of priorities.



- development of the Ardaun Corridor to the east of the city will create demands for social infrastructure such as schools, recreational and leisure facilities;
4. Continued protection of both **natural and built heritage facilities**, building on the natural and cultural attractions in the centre of Galway, in order to ensure that these key ingredients in recent success are protected and conserved into the future;
 5. The third-level institutions, jointly with other key stakeholders (enterprise agencies, local authority, other State bodies, business) need to formulate a **shared innovation strategy** for the Gateway and for their respective roles within this;
 6. Further **renewal of the city centre**, including the Docklands and Ceannt Station areas is also a priority.



Priorities			
	New/Improved Roads		Hospital
	Urban Expansion/Redevelopment		University/IoT
	Social and Community Development /Facilities		Railway Station
	Public Transport		Port
	Sanitary Services		Airport



Short-term Investment Priorities – Challenges and Barriers

Strategic Urban Transport Routes

- Apart from the planned Athenry-Galway commuter rail link, prospects for central funding appear limited due to lack of an ongoing and specific measure to support such investments.
- Current bus service licensing processes are seen as a barrier to the commencement of new services on an improving local road infrastructure, and such processes are in need of statutory reform.

Social/Community Facilities

- Responsibilities for improving such facilities are spread across departments causing delays in progressing decisions and funding allocations.
- Limited funding capability at local level for the amount of investment required.

Longer-term Priorities

Beyond the ‘quick win’ perspective, longer-term issues were also highlighted by the local authorities and enterprise development agencies during the Gateway study process. Although the impact or results may be long-term, it is important that steps are taken now to put supporting initiatives in place. Such longer-term priorities include:

- The need to deepen and strengthen the existing research and innovation capabilities of NUIG and GMIoT through linkages to enterprise in the region;
- Co-ordination between local authorities and the relevant departments and Government agencies in the provision of social infrastructure such as schools, community facilities and amenities as an integral component of the process of developing large new residential areas;
- The development of rail links between Galway and Limerick, Shannon and Mayo/Sligo is also noted as a longer-term potential investment;
- The need to ensure that water services/waste management infrastructure meets the needs of the rapidly growing population and enterprise base.

3.5 Letterkenny

Overview

The NSS identifies Letterkenny as a shared Gateway with strong cross-border economic links with Derry in Northern Ireland. This cross-border element constitutes both an opportunity and a set of challenges for the Letterkenny/Derry Gateway.

Letterkenny itself (including environs) had a population of just over 15,000 in 2002, up by 27% on 2006 – the highest growth of any Gateway over this period. As well as a rapidly growing population,



Letterkenny has an expanding retail and local services sector, an extensive and diversified local enterprise base, and a wide hinterland.

There is potential for extensive synergies between Letterkenny and Derry, which together constitute the fourth largest urban complex on the island of Ireland. These include an integrated approach to the provision of physical and social infrastructure. These synergies need to be operationalised. Another principal development challenge relates to overcoming the town's peripheral location within the country through improved access by air, road, public transport and energy/communications networks.

The current position in Letterkenny is set out below under five key Gateway characteristics.

Economic Infrastructure

- Letterkenny is located on national primary routes N13/N15 to Sligo, the N14 to Lifford, Strabane and Dublin and the N13/A2 to Derry and Belfast. Access to Letterkenny is improving through investment in the N56 Mountaintop to Illistrim (completion 2008).
- Letterkenny is relatively distant from the main international airports at Belfast and Dublin, and therefore the regional airport at Derry plays an important role. Improved road access is essential to allow for ease of mobility, both nationally and internationally.
- In Letterkenny, the water supply is inadequate to meet current demand, and the wastewater network is deficient.
- The electricity supply network in Co. Donegal, including Letterkenny, remains relatively weak.
- The Letterkenny Metropolitan Area Network, providing broadband infrastructure, was commissioned in 2004. However, the proposal to link via Bridgend and Derry with the Northern Ireland network, through open access cable, needs to be progressed to provide resilience and competition in the market place.

Enterprise and Economy

- Letterkenny's local employment base is fairly diverse, with manufacturing and retailing predominating but with a growing emphasis on services.
- As the main commercial centre of north Donegal, Letterkenny has attracted a number of key employers over recent years, including software development and financial services sectors. Major employers include Eircom, Pramerica Systems, Pacificare and Boston Scientific Telecoms.
- Proposals are being developed with close co-operation between IDA and Invest Northern Ireland to develop a Virtual Cross-Border Technology Park that will link business parks in Letterkenny and Derry, supported through EU Structural Funds.
- Donegal as a whole has been experiencing significant levels of enterprise job losses, and a Task Force has been established under the aegis of the DETE to consider options for addressing this.

Labour Force, Skills and Innovation

- In the Border region as a whole, 25% of the workforce has completed third-level education (9% in



science), which is below the national average of 30%⁴¹.

- The Institute of Technology located at Letterkenny has a student population of over 2,000 and is linked to the Institute of Technology at Sligo and the University of Ulster's Magee College in Derry. Links have been maintained between the third-level institutions and industry within the town through the Letterkenny Institute of Technology Business Development Centre.
- The Institute of Technology has a key focus on business and engineering related studies and is endeavouring to develop increased links with local industry. Although both Letterkenny and Derry have third-level colleges, the critical mass and capacity is insufficient to compete for national R&D funding. Letterkenny IoT is currently the smallest of the IoTs in the Gateways.

Quality of Life

- Taking Letterkenny and Derry together, there is a wide range of social and cultural infrastructure in the area. However, in the future, an integrated and cross-border approach to the harnessing and development of such infrastructure is critical to ensure that it is available to all of the population. An example is the Regional Culture Centre.

Local Capacity and Leadership

- The current development plans⁴² for Letterkenny are grounded in the NSS and RPGs⁴³, and recognise the growth potential of the town in conjunction with the Regional Development Strategy for Northern Ireland – 'Shaping our Future'.
- The local authority has formed an internal Implementation Group to oversee the successful implementation of the Letterkenny and Environs Development Plan 2003-09, and development of the Letterkenny/Derry corridor. This group consists of a number of key directorates including Planning and Economic Development, Roads, Water, Environment and Emergency Services.
- However, there is no formal integrated development framework for Letterkenny/Derry development on a cross-border basis.

Short-term Investment Priorities

Short-term investment priorities have been identified on the premise that their implementation would represent 'quick wins' and would unlock the potential for accelerated growth of the Gateway and the region⁴⁴. Items have not been included where implementation is already underway. They are not listed in order of priority. Where appropriate, priorities with a spatial dimension are indicated on the accompanying map.

- **Improved cross-border broadband** infrastructure to strengthen the links between Letterkenny and Derry and to overcome the Gateway's relative peripheral location;
- **Improved capacity in water services** through the acceleration of the Lough Mourne Regional

⁴¹ PACEC Economic Consultants: CSO 2002.

⁴² Donegal Development Plan 2000-2006 & the Letterkenny and Environs Development Plan 2003-2009

⁴³ Regional Planning Guidelines for the Border Region



Scheme and temporary augmentation proposals. Sewage capacity increase is planned, but confirmation of funding and construction timeframe is required;

- **Road networks** in the shorter term investments at congestion black-spots on the main approaches to Letterkenny from the Republic of Ireland and Northern Ireland on the A5, N14 (Derry/Dublin) and the A2/N13 link (north of Derry city) are required;
- An upgrade of network capacity to supply 220KV on each side of the border is required to improve **energy services** (in the absence of justification for the extension of gas supply from Derry to Letterkenny);
- The third-level institutions in the combined Letterkenny-Derry Gateway, jointly with other key stakeholders (enterprise agencies, local authority, other State bodies, business) need to formulate a **shared innovation strategy** for the Gateway and for their respective roles within this.

Short-term Investment Priorities – Challenges and Barriers

The key challenge for the development of Letterkenny/Derry as a linked Gateway is to gain agreement on an overall development framework by the relevant local authorities and Government departments in the Republic of Ireland and Northern Ireland. A framework should encompass approval and funding mechanisms, co-ordination of public services and involvement of the private sector. The development of the Virtual Cross-Border Technology Park may provide some elements of a model to inform the development of a framework.

⁴⁴ See note in Section 1.3 concerning the source of priorities.



Longer-term Priorities

Longer-term issues were highlighted by the local authorities and the enterprise development agencies during the course of the study. Although the impact of these issues may be long-term in effect, certain actions must be taken now in order to put supporting initiatives in place. Such longer-term priorities include:

- The need to deepen and strengthen the existing research and innovation capabilities of the Institute of Technology both by linkages to enterprise in the region and through increased networks with other universities and institutes;
- The strengthening of the Letterkenny-Derry axis as a transportation and development corridor is identified in the context of developing an 'island economy'. Western road links are also perceived as a long-term priority to build a 'Gateway corridor' down through Letterkenny, Sligo, Galway, Limerick and Cork as now envisaged in 'TRANSPORT 21'.
- Consideration of high-speed transportation corridors, possibly to motorway standard, to link Letterkenny/Derry with Dublin and Belfast.

3.6 Limerick/Shannon



Overview

The Limerick/Shannon area has been a major regional growth centre since the 1960s – based initially around Shannon Airport, Shannon Town and Shannon Free Zone, and more recently the University of Limerick, The National Technological Park at Plassey and Raheen Industrial Estate. The area was also a major arrival/departure centre for US tourists, with attractions and hotel accommodation within the region.

The NSS envisages significant growth in the Limerick/Shannon Gateway. In it, the Gateway is seen as being the engine of growth and national competitiveness within its region, while diffusing growth within its zone of influence. It is seen as the lever for investment into the region, through its critical mass, strategic location, and connections within the national transport framework. The Limerick/Shannon Gateway is supported by Ennis as a hub, taking advantage of its strategic location between Limerick and Galway.

In 2002 the Gateway area, including Ennis (but not the whole of Zone 1 as identified in the Mid-West RPGs) had a population of 95,500 people, up by nearly 10% on 1996, and making it the third largest Gateway after Dublin and Cork.

Development challenges include: diversification of its current manufacturing base, part of which may be under threat from lower-cost competition; improving the recent image of Limerick City; strengthening relationships between the local authorities; co-operating across administrative boundaries; and adjusting to the impending end of the obligatory “Shannon stop-over”.

The current position in Limerick/Shannon is set out below under five key Gateway characteristics.

Economic Infrastructure

- Limerick is located on National routes N20 to Cork, N24 to Waterford, N18 to Galway/Shannon, N21 to Tralee and N7 to Dublin. Access to and around Limerick city will improve through the implementation of three major current road schemes – the Shannon Fourth Crossing, the North Ring and the implementation of Green Routes. Access from Limerick to Dublin will be significantly improved upon completion of the N7, and to Galway with improvements to the N18, both of which are scheduled for completion by 2010.
- The Gateway is benefiting from overall improvements in the national rail infrastructure and services. Mainline services to Dublin will have increased frequency by 2007. Re-opening of passenger services on the Ennis-Athenry leg of the Western Rail Corridor is promised in ‘*TRANSPORT 21*’, and the feasibility of a Shannon Airport rail link will be studied.
- Shannon Airport is the second largest airport in Ireland and is developing into a significant hub for Ryanair. It provides international access to the region, including from the US, and is the key feature of the area’s transport infrastructure. Passenger numbers in 2005 were over 3 million, up 35% on 2004. Its obligatory stop-over status is, however, to be altered shortly.
- Limerick Port is one of a number of ports serving the Mid-West region. Also within the area are the



Port of Foynes and the Moneypoint and Aughinish facilities. Foynes is the only harbour on the west coast physically linked to the national rail network.

- IT broadband is in place through wired and wireless infrastructures throughout Limerick. Issues for progress in the future include strengthening the resilience of networks and ensuring a range of alternative networks and service providers is in place.
- There are good hotel amenities in the Gateway, including the new landmark Clarion Hotel development in Limerick city.
- Water and wastewater facilities in Limerick have been the subject of major recent investment, but further investments are still required.

Enterprise and Economy

- Analysis of private sector employment in Limerick indicates high employment in the manufacturing sector (29%) with the market services sector following at 24%. The wholesale and retail sector employs 22% of employees within Limerick⁴⁵.
- Limerick is a base for a number of major employers, especially in the ICT sector, including Dell, Analog and Stryker. Global competition in the ICT sector is intense, and there is a need for transition to higher value-added manufacturing and services within this sector in order to sustain and grow employment.
- There is a developed tourism product, with well-known international and national attractions (including Bunratty Castle and Folk Park, the Cliffs of Moher, the Burren and Lough Derg), and with significant recent investment in hotels. The alteration of the “Shannon stop-over” may affect access to and from the US, but the recent arrival of Ryanair opens up potential for development of the “city-break” market in which the area has not participated to date.

Labour Force, Skills and Innovation

- In the Mid-West region as a whole, 27% of the workforce has completed third-level education (10% in science), which is close to the national average of 30%⁴⁶.
- With Dublin, Cork and Galway, Limerick is the fourth university city and has the fourth largest third-level student population (nearly 14,000 full-time in 2002-03). The University of Limerick (UL) and the Limerick Institute of Technology (LloT) have established research centres. The Shannon Development Knowledge Network has also been established to bring business, education and innovation together focused on the National Technological Park.

Quality of Life

- Local amenities and cultural activities in Limerick contribute to quality of life issues and can help to attract development. These facilities include the University Concert Hall and the Hunt Museum.
- The Riverside City Project⁴⁷ encompasses the area of the new river crossing to the Docklands,

⁴⁵ Irish Database Systems

⁴⁶ PACEC Economic Consultants: CSO 2002.

⁴⁷ The Riverside Project Office is located in the Granary, Michael Street, Limerick



including the Quayside and City Centre, Kings Island and the Park Canal to the University of Limerick. The project focuses on regeneration and development, including Park Canal.

- With a good natural setting, including the Ballyhoura mountains, the Golden Vale, the tidal estuary of the River Shannon and Lough Derg, the Limerick Gateway has the potential to further upgrade and develop local amenities such as walkways, parks and pedestrian routes.
- Within core urban areas, especially of Limerick, there are ongoing issues of social exclusion with associated levels of crime, which are problems both in their own right but also for the general image and attractiveness of the area as a Gateway.

Local Capacity and Leadership

- A land use and transportation study (LUTS) for the wider Limerick city area has been prepared, but has not as yet been adopted.
- The administration of the Gateway and its environs is spread across four separate local authorities, and co-ordination of management and development across these boundaries presents an ongoing challenge. Co-operation between the local authorities is essential to the development of the Gateway as a whole.

Short-term Investment Priorities (3-5 years)

Short-term investment priorities have been identified on the premise that their implementation would represent ‘quick wins’ and would unlock the potential for accelerated growth of the Gateway and the region⁴⁸. Items have not been included where implementation is already underway. They are not listed in order of priority. Where appropriate, priorities with a spatial dimension are indicated on the accompanying map.

- The improvement of the **road network** and road access via Phase II of the Southern Ring Road (including Shannon Tunnel) and the N69, improving access to the Docklands and Port of Foynes;
- **Improved public transport** linkages between Ennis, Shannon and Limerick are required, including park-and-ride facilities, to enable easy access to the international airport and hub. Enhancements to the public transport systems within Limerick through bus prioritisation (e.g. bus corridors);
- **Targeted urban renewal** including pedestrianisation, public spaces and cultural facilities to improve the ‘quality of life’ and reputation of the Mid-West Gateway;
- **The development of recreational facilities**, in line with the Recreational Strategy⁴⁹ which includes the development of Regional Scale Parks to address the recreational needs of the city and its growing population;

⁴⁸ See note in Section 1.3 concerning the source of priorities.



- **Branding and marketing** initiatives need to be developed to address the current negative public perception of Limerick;
- To enable progress on infrastructure delivery, **co-operation** between the local authorities and key organisations needs to be further developed;
- The third-level institutions in the Gateway, jointly with other key stakeholders (enterprise agencies, local authority, other State bodies, business) need to formulate a **shared innovation strategy** for the Gateway and for their respective roles within this.

Short-term Investment Priorities – Challenges and Barriers

Public Transport

- Current bus service licensing processes are seen as a barrier to the commencement of new services on an improving local road infrastructure, and such processes are in need of statutory reform.
- Progress on agreeing bus prioritisation measures is critical to facilitating a more efficient transport system.

Urban Renewal/Enhancement

- Existing tax incentive mechanisms are due to expire during 2006, and the outlook is bleak for a new round of incentives. Development incentives would have a key role in promoting the development of areas such as the Limerick Docks and associated industrial areas.

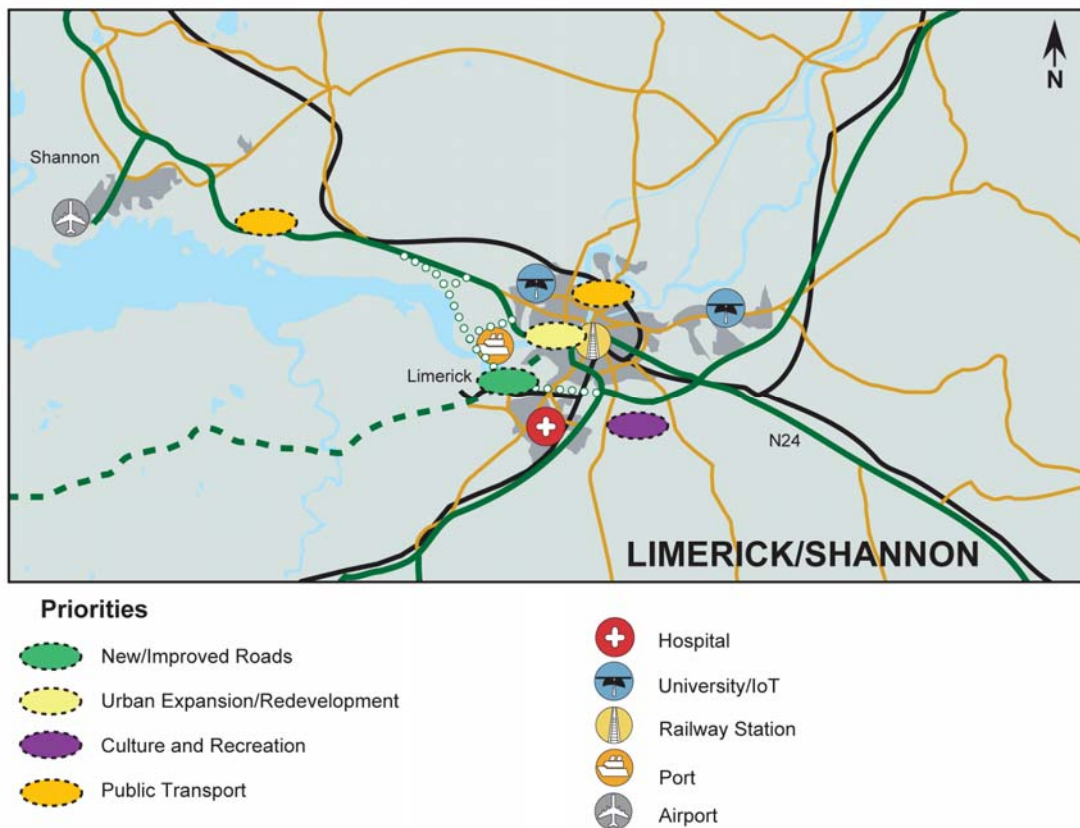
Recreational Facilities

- Responsibilities for providing support for the Limerick Recreation Strategy are spread across departments, causing delays in progressing decisions and funding allocations, and in some cases there are no dedicated funding lines apparent.

Branding and Marketing

- There is a need to develop a strong brand for Limerick, and a clear driver needs to be identified to progress its national and international branding and marketing.

⁴⁹ Limerick City Sports and Recreational Policy Framework Plan, Draft 2004.



Longer-term Priorities

Longer-term issues were also highlighted by the local authorities and the enterprise development agencies during the course of the study. Although the impact of these issues may be long-term in effect, actions must be taken now in order to put supporting initiatives in place. Such long-term priorities include:

- Renewal of the Docklands area, including remediation of contaminated sites, and development of the Riverside City project;
- Harnessing the communications networks, including rail, for new economic development throughout the region;
- The further stimulation of knowledge-based enterprise to balance the high level of dependency on the ICT manufacturing sector.



3.7 Midland Gateway

Overview

The NSS identifies Athlone, Tullamore and Mullingar as a linked Midland Gateway. This builds on their strategic, central location in both Ireland and the Midlands - the towns are located at the intersection of east/west radial transport corridors from Dublin with north-south routes.

Overall, the combined area had a population of about 40,000 in 2002, with about 26,000 located within the three towns. The overall population grew by about 12% between 1996 and 2002.

The strengths of the Gateway include its central strategic location, its proximity to Dublin and the East Coast, and a high quality of life in its three population and economic centres. There is evidence of increased private sector investment in the Gateway, with ongoing redevelopment of the town centres and investments in retail developments as well as hotels and leisure facilities. Parts of the Midland Gateway have been growing rapidly, driven by strong house building activity and proximity to Dublin.

The Midland Gateway is the most innovative and challenging of the Gateways, and its full development to the scale and level of integration of the other Gateways may take a considerable time. The current position in the Midland Gateway is set out below under the five key Gateway characteristics.

Economic Infrastructure

- The Midland Gateway is well connected to other Gateways via National routes – M4/6 to Dublin/Sligo/Galway, N52 to Dundalk, N80 to Enniscorthy and Rosslare Europort, N55 to Cavan and N61 to Roscommon. Access is improving through three major new schemes – the N52 Mullingar Bypass (complete 2006), the M6 Kilcock-Kinnegad (now open) and the M6 Kinnegad-Kilbeggan Phase I dual carriageway (complete 2007).
- It is also well located on the national rail network, with Tullamore and Athlone on the Dublin-Galway line and Mullingar on the Dublin-Sligo line. Faster and more frequent services will be available on all lines over the next few years.
- IDA Ireland's Athlone Business and Technology Park at Garrycastle (40 hectares), the IDA Tullamore Business and Technology Park and Offaly County Council's Technology Park, provide serviced sites and advance building space for industry.
- Broadband infrastructure has been upgraded, with the Metropolitan Area Network completed and fully operational.
- Water services infrastructure is in the process of being upgraded in the Midland Gateway, with the planned upgrading of wastewater and water supply facilities in Mullingar and Tullamore under the Government Water Services Investment Programme 2004-06.



Enterprise and Economy

- Key employers in the region include AXA, GMAC, ICT Eurotel and Ericsson, all involved in internationally traded services and software development activities. Medical and pharmaceutical companies include Elan, Abbott, Tyco Healthcare, Boston Scientific, ConorMed, Gene Medix, and Innocoll. Other companies include Zannini, Sennhauser and Isotron.
- The Midlands economy is relatively reliant on manufacturing compared to a number of the more developed Gateways.
- There are a number of tourist attractions in and near the Midland Gateway, such as the Shannon River and its tributaries, natural lakes, and the Slieve Bloom mountains, with excellent potential to build a strong domestic tourism and leisure industry base. Several high profile hotel chains have recently invested in the area.

Labour Force, Skills and Innovation

- In the Midland region as a whole, 22% of the workforce has completed third-level education, below the national average of 30%⁵⁰.
- The Athlone Institute of Technology has a student population of about 3,500, or about 3% of the national third-level student population. It has promoted and encouraged increased interaction between education and industry through its Business Innovation Centre.
- The Institute produces approximately 1,700 graduates per annum. The regional office of FÁS also has an output of approximately 3,000 trainees per annum.

Quality of Life

- There are a number of recreation and outdoor amenities, including the Regional Sports Centre in Athlone and Tullamore Harriers athletics facilities. However, further investment in social and cultural infrastructure is needed if sufficient critical mass in terms of population and business activity is to be facilitated.
- A number of new amenities, such as Belvedere House and Demesne near Mullingar, have been provided by the local authorities and represent the type of regional-scale tourism and amenity interventions that are increasingly important to the development of the Gateway and its surrounding region.

Local Capacity and Leadership

- Existing plans⁵¹ for the towns of Athlone, Tullamore and Mullingar are in broad conformity with the policies of the NSS and RPGs. Offaly and Westmeath County Councils, and their constituent Town Councils, in the Midland Gateway are in the process of finalising an overall development framework for the Gateway.

⁵⁰ PACEC Economic Consultants; CSO 2002.

⁵¹ Including the: Westmeath Development Plan 2002, Athlone Environs Development Plan 2002, Tullamore and Environs Development Plan 2004, Offaly County Development Plan 2003.



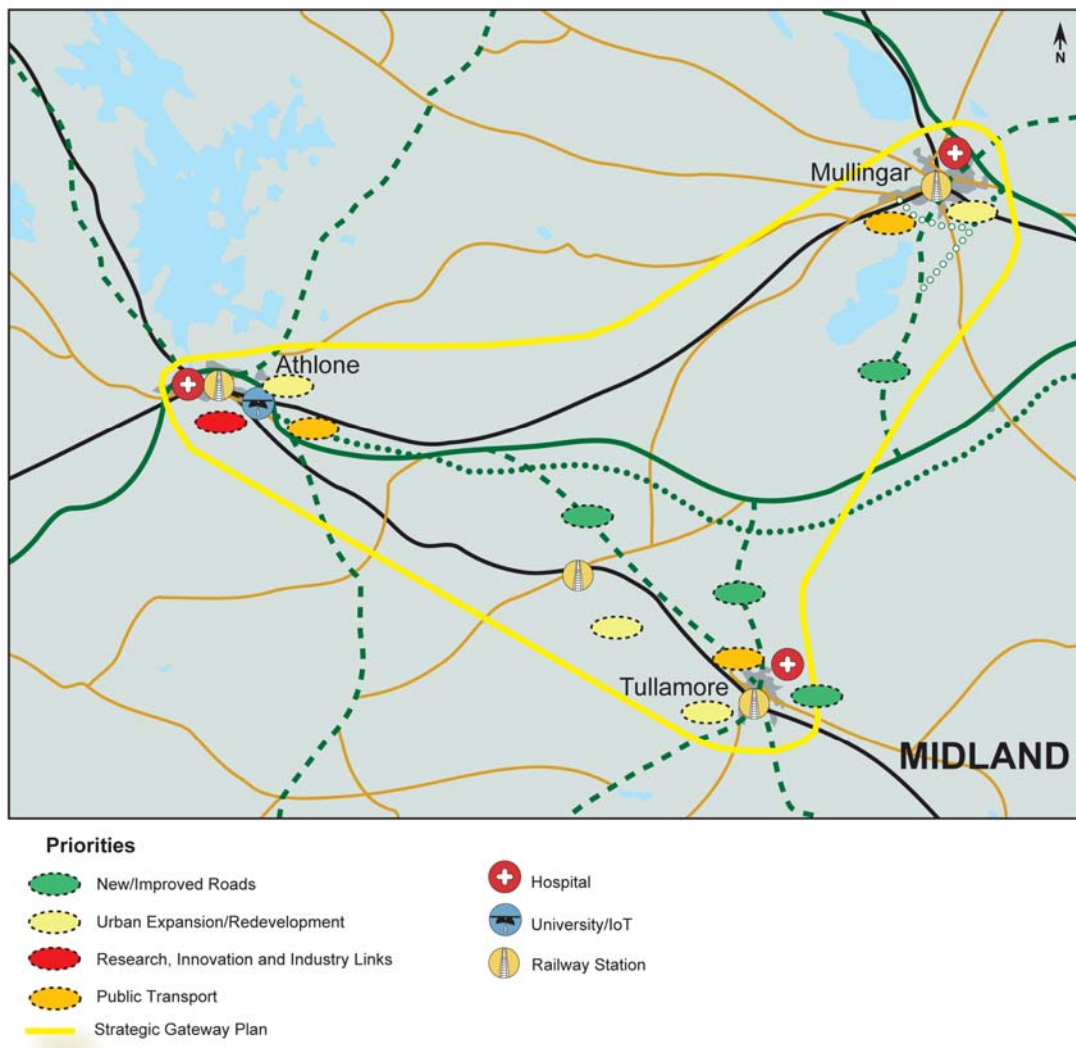
- There is a need to better co-ordinate the required involvement of a range of utility providers, including ESB, Bord Gais and the NRA, together with the county councils and the development agencies, to develop business and technology parks and serviced sites for future potential inward investment to the Gateway.

Short-term Investment Priorities

Short-term investment priorities have been identified on the premise that their implementation would represent ‘quick wins’ and would unlock the potential for accelerated growth of the Gateway and the region⁵². Items have not been included where implementation is already underway. They are not listed in order of priority. Where appropriate, priorities with a spatial dimension are indicated on the accompanying map.

- Investment in a **significant research capacity institute** to support the current function of Athlone IoT, the region’s enterprise base, and to attract and support economic activity into the Midland region;
- **Strategic transport routes** to enhance links within the Gateway of Athlone, Mullingar and Tullamore as well as links to other Gateways. Includes investment in the N80 and the N52 routes, which are included in *TRANSPORT 21*. Investment in an integrated bus-based public transport system within and between each of the Gateway towns is also a key priority;
- Strengthening of **basic infrastructure** such as water supply, wastewater and solid waste is required to avoid development constraints for the expanding population and its services requirements;
- Preparation and adoption of a **Strategic Development Plan** for the Gateway addressing the provision and prioritisation of physical, social and cultural infrastructure across the three towns. This can also address the potential to bring something innovative to the Midland Gateway, which would act as a distinguishing feature and a magnet for the area;
- Need to develop a strong brand **identity** for the Gateway (e.g. by establishing a dedicated marketing co-ordination office).

⁵² See note in Section 1.3 concerning the source of priorities.



Short-term Investment Priorities: Challenges and Barriers

Integrated Gateway Plan

- The implementation of the integrated development framework for the Midland Gateway will present an overall vision for its development over the lifetime of the NSS.

Infrastructure Enhancement

- The first challenge is to give meaning and substance to the Gateway concept and to develop a clearer approach to implementing the Gateway concept as a precursor to highlighting associated infrastructural priorities.
- With improved infrastructure and the evolution of a shared identity for the three constituent towns, the Midland Gateway has the potential for substantial growth.



Distributor Routes

- Current funding prioritisation does not favour the full implementation of an upgraded N52 link between Tullamore and Mullingar, which would be essential to maximise the benefit of the imminent M6 motorway and connectivity between the three towns.
- Current bus service licensing processes are seen as a barrier to the commencement of new services on an improving local road infrastructure, and such processes are in need of statutory reform.
- There is limited funding capability at local level for the amount of investment required.

Developing a Brand Identity

- This is regarded as a particular challenge for the emerging Midland Gateway, and may require supports for innovative proposals to advance its development and marketing.

Longer-term Priorities

Certain longer-term issues were highlighted by the local authorities and the enterprise development agencies during the course of the study. Although the impact of these issues may be long-term in effect, certain actions must be taken now in order to put supporting initiatives in place. Such longer-term priorities include:

- The third-level institutions in the Gateway, jointly with other key stakeholders (enterprise agencies, local authority, other State bodies, business) need to formulate a **shared innovation strategy** for the Gateway and for their respective roles within this.
- **Co-ordination** between local authorities and the relevant departments and Government agencies in the provision of social infrastructure such as schools, community facilities and amenities as an integral component of the process of developing large new residential areas.
- Development of public transport linkages between the Gateway towns and their hinterlands has already been identified as an important infrastructure goal. This could include the re-opening of the Mullingar-Athlone railway line.



3.8 Sligo

Overview

With a population of about 20,000, Sligo and its environs constitute a relatively small Gateway, but it is the largest urban centre in the North-West and is located within a scenic hinterland. With Letterkenny and Dundalk, it is one of three newly designated Gateways in the Border region.

The NSS envisages Sligo transforming into a compact, fast growth centre, driving wider regional development in the North-West in the period to 2020. Since the NSS was published, there has been a notable acceleration of private sector development in Sligo as well as infrastructure enhancements. However, very significant development challenges remain if Sligo's population is to achieve critical mass.

The current position in Sligo is set out below under five key Gateway characteristics. The accompanying map indicates some of the following:

Economic Infrastructure

- Sligo is located on National routes M4/N4 to Dublin, N15 to Donegal, N16 to Enniskillen and N17 to Galway. Overall road access to Sligo is also improving through major ongoing current schemes, e.g. M4/N4 to Mullingar recently opened.
- A more frequent rail service to Dublin commenced in December 2005, with five services each way per day.
- After long delays, the inner relief road through Sligo was opened in September 2005 and this will have significant benefits in unlocking wider development potential within the town.
- The regional airports at Strandhill and Knock provide air access to Dublin and the UK.
- Sligo Port has reached a very low level of operations. It is shortly to come into the ownership of the local authority.
- A broadband fibre optic network was completed in September 2005.
- The electricity grid is being strengthened, with the development of a 220kv line to Sligo. There is no natural gas supply, however, a significant issue for energy-intensive FDI decisions.
- Water and wastewater facilities are in need of strengthening to improve resilience and to accommodate future growth, especially if growth in the bio-pharma sector is to be encouraged. Improvements are planned including the Sligo and Environs Water Supply Scheme and the Sligo Sludge Management Scheme, and funding has been approved under the Government Water Services Investment Programme 2004-06.

Enterprise and Economy

- The employment base of Sligo includes several major companies in the pharmaceutical/medical sector including Abbott, Fort Dodge and Stiefel Laboratories.
- Engineering is a key employer, although global competitiveness is a challenge for this sector.



- There are extensive newly opened hotel amenities in Sligo, including a 700-person conference centre, which should stimulate the potential in the holiday and leisure sector.
- Enterprise Ireland incubator units are being provided scheduled for completion with a total of 20,000 sq. ft. of space;
- There is a newly developed IDA Sligo Business and Technology Park at the Finisklin Industrial Estate, and an IDA Business Park is proposed at Oakfield.

Labour Force, Skills and Innovation

- The wholesale and retail sector, and the market services sector, each engage 31% of private sector employment in Sligo, with manufacturing employing 20%⁵³.
- In the Border region as a whole, 25% of the workforce has completed third-level education (9% in science), which is below the national average of 30%⁵⁴.
- Sligo Institute of Technology has approximately 5,000 students and has a strong focus on business-related studies, as well as engineering, science and lifelong learning. It aims to develop increased links with local industry. In addition, Sligo IoT is a member in the recently established National Biotechnology Research Institute (NIBERT).
- St. Angela's College also provides third-level courses, including education, home economics, economics and social studies and nursing and health studies, and has good European links. A Food Product Development Centre was recently established.
- The FÁS Training Centre, with 1,500 trainees in 2003, has a particular expertise in precision engineering/tool making and information technology.

Quality of Life

- Sligo's immediate hinterland is one of the most physically attractive of any Gateway, and offers scope for development of a high-amenity environment. However, at present the urban area does not match this, with issues such as traffic congestion, urban decay and some low quality housing.
- The local authority has made progress in establishing a North Bank Cultural Quarter through the Niland Gallery and the County Museum.
- Despite the outstanding natural setting and some local amenities such as the Cleveragh Sports Centre and Park, much progress needs to be made on further local amenities such as parks, sports facilities and walking/cycling routes. A pedestrianisation programme and the development of a focal point in the city centre are being pursued by the Borough Council.
- Although located in a geographically limited hinterland, Sligo is clearly identified as the centre in which people shop, work and access a range of services. Limited local amenities and cultural activities in Sligo impacts upon quality of life issues that can help to attract development.

⁵³ Irish Database Systems

⁵⁴ PACEC Economic Consultants; CSO 2002.



Local Capacity and Leadership

- Progressive statutory development plans⁵⁵, grounded in the NSS, and RPGs are in place. However, there is a significant risk of urban sprawl if current plans are not implemented in a timely manner, as the fastest growth levels are taking place beyond Sligo and its immediate environs.
- A Local Authority Gateway Implementation Group has been established, with a full-time officer, and is closely engaged with the County Development Board.
- The local authority is conditioning planning permissions to ensure that hoardings around new developments are “Gateway” branded. This is a useful way of highlighting public awareness of the Gateway status of Sligo. However, there is scope for creating much greater awareness of Sligo and its status, internally and externally.

Short-term Investment Priorities (3-5 years)

Short-term investment priorities have been identified on the premise that their implementation would represent ‘quick wins’ and would unlock the potential for accelerated growth of the Gateway and the region⁵⁶. Items have not been included where implementation is already underway. They are not listed in order of priority. Where appropriate, priorities with a spatial dimension are indicated on the accompanying map.

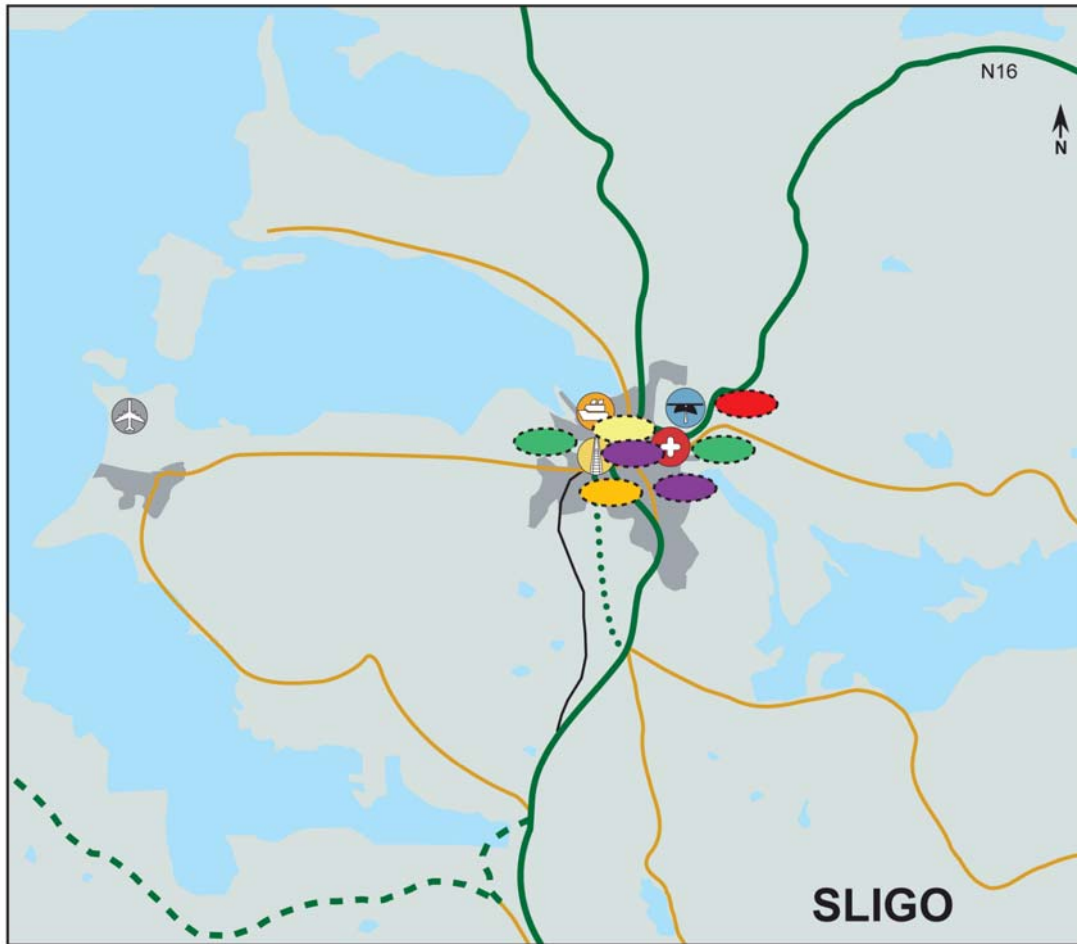
- Maximising the development potential of the centre of Sligo, including brownfield sites such as the former Docks area through **targeted urban renewal and urban enhancement initiatives**, investment in pedestrianisation and amenity improvements;
- **Strategic urban distributor routes** to open up access by road (car and bus-based local public transport) to large tracts of new housing, commercial and employment related lands and to accelerate urban development including the Eastern and Western Distributor Routes, the associated bridge at Doorly Park and the reservation of an outer bypass route. This will improve connectivity between businesses on a north-south axis;
- Provision of **regional sports and recreation facilities** and enhanced amenities for a growing population in the Gateway through the proposed development of Cleveragh Regional Park and sports complex on Council-owned lands situated on fringe of Sligo;
- Continued development of a **cultural/entertainment quarter**, building on the natural and cultural attractions in the centre of Sligo.
- Building on its recent involvement in NIBERT, there is need to strengthen the emerging **research and innovation capacity** of the Institute of Technology, to strengthen linkages with existing enterprise in the region, and linkages to other third-level institutes such as the university sector. Specifically, the third-level institutions in the Gateway, jointly with other key stakeholders (enterprise agencies, local authority, other State bodies, business) need to

⁵⁵ Including the: Sligo County Development Plan 2005, Sligo & Environs Development Plan 2004

⁵⁶ See note in Section 1.3 concerning the source of priorities.



formulate a **shared innovation strategy** for the Gateway and for their respective roles within this.



Priorities	
	New/Improved Roads
	Urban Expansion/Redevelopment
	Research, Innovation and Industry Links
	Public Transport
	Culture and Recreation
	Hospital
	University/IoT
	Railway Station
	Port
	Airport

Short-term Investment Priorities – Challenges and Barriers

Urban Renewal/Enhancement

- Existing tax incentive mechanisms will expire during 2006, and the outlook is bleak for a new round of development incentives.
- The process of transferring the port area to local authority is proving challenging.
- Resources available in Sligo for urban renewal and enhancement investments are very limited compared to the scale of investment required under a major pedestrianisation initiative.



Distributor Routes

- Local development contributions are limited due to a weak local housing market, and this reduces the capacity for the local authority to fund the planned urban road network.
- Prospects for central funding appear limited due to resource constraints and the lack of ongoing and specific measures to support such investments.
- Current bus service licensing processes are seen as a barrier to the commencement of new services on an improving local road infrastructure, and such processes are in need of statutory reform.

Regional Sports Facilities/Cultural Facilities

- Responsibilities for improving such facilities are spread across departments, causing delays in progressing decisions and funding allocations, and in some cases there are no dedicated funding lines apparent, e.g. Cleveragh Regional Park.
- There is limited funding capability at local level for the amount of investment required.

Research and Innovation Capacity

- The IoT, enterprise agencies and other key stakeholders should develop a common RTDI agenda for Sligo so as to maximise the relationship between the Institute and its location to the mutual benefit of both.

Longer-term Priorities

Longer-term issues were also highlighted by the local authorities and the enterprise development agencies during the course of the study. While the impact of these issues may be long-term in effect, certain actions must be taken now in order to put supporting initiatives in place. Such longer-term priorities include:

- The importance of co-ordination between local authorities and the relevant departments and Government agencies in providing social infrastructure in Sligo, such as schools, community facilities and amenities, as an integral part of the process of developing large new residential areas;
- Sligo does not have motorway/dual carriageway links to Dublin at present. Such links should be planned for the future, but are not an immediate priority. The development of primary road corridors to link the Gateways and their hinterlands have already been identified as important infrastructure goals, and it is important that they are delivered within the time-lines defined in ‘*TRANSPORT 21*’;
- Western road links, to form part of a ‘Gateway corridor’ linking Letterkenny, Sligo, Galway, Limerick, Cork and Waterford, and the full development of the Western Rail Corridor is also noted as a longer-term priority investment;
- The need to provide environmental infrastructure to ensure the needs of future population growth and associated business can be accommodated;
- East-to-west road connectivity to improve access throughout the Border region, and between Northern Ireland and the Republic, is a long-term priority, particularly the Sligo-Dundalk route through Cavan (which has already been the subject of a feasibility study, and has been captured in the Border’s RPGs⁵⁷). This initiative will involve co-operation between service providers and the local authorities within the Border region and on both sides of the border.

⁵⁷ Regional Planning Guidelines for the Border Region, Section 6.2, Pg. 79.



3.9 Waterford

Overview

Waterford is an important port city and the principal urban centre in the South-East. The city and environs had a population of about 47,000 in 2002, up by 6% since 1996.

Its strengths include a strategic location, proximity to a major national port at Belview, a compact city with a high quality urban fabric and an outstanding estuarine setting, and a fast developing retail and local services sector.

The presence of a number of other relatively large urban centres situated close to Waterford (such as Kilkenny, Clonmel and Wexford), coupled with the fact that Waterford city itself straddles local authority boundaries, presents challenges for the co-ordination of development in this Gateway and its role as the driver of development in the South-East region.

The current position in Waterford is set out below under five key Gateway characteristics.

Economic Infrastructure

- Waterford is located on National routes to Dublin (N9), Cork (N25), and Limerick (N24). The standard of these roads has long been identified as a weakness, but is now being addressed.
- The South-East Regional Airport provides a limited air link for Waterford, with connections to the UK and France.
- Waterford Port, now primarily located at Belview, is one of the key international seaport connections for the country, and there are plans for further development of bulk lo-lo and ro-ro facilities.
- The rail connection to Dublin has been improved, and there are existing (but underutilised) lines connecting to Limerick and Rosslare. Dublin services will shortly be upgraded in terms of speed and frequency.
- The provision of the wastewater treatment plant (at Gurteens) will significantly improve water services in Waterford.
- Waterford's gas supply is insufficient if the location is to be competitive for heavy utility investment in the future, and there are also issues regarding the quality of electricity supply.

Enterprise and Economy

- Analysis of the number of private sector employees in Waterford indicates high employment in the manufacturing sector (42%), with the market services sector following at 22%. The wholesale and retail sector employs 20% of employees within Waterford;⁵⁸

⁵⁸ Irish Database Systems



- Manufacturing is therefore a key employer, with over 40% of the workforce involved, primarily in the engineering sector.
- There are also a number of key employers in the internationally traded services sector, including AOL/Time Warner and SunLife Financial, and life sciences companies such as Bausch and Lomb and Genzyme.
- IDA has assembled a landbank of 136 acres at Belview Port, which is being marketed to utility intensive industry. Significant upgrading of the site has already taken place including a new road, landscaping and a planned new waste water treatment plant. However, there is a need to enhance the current utility capability further with investment in water, gas and electricity. In addition, the IDA has developed the 100 acre Cork Road Industrial Estate and the 77 acre Business and Technology Park.
- Waterford has a developing tourist industry that can build on a high quality natural environment and developing cultural attractions, but to date it has relied very heavily on Waterford Glass as its main attractor.

Labour Force, Skills and Innovation

- In the South-East region, 24% of the workforce has completed third-level education (9% in science), which is below the national average of 30%⁵⁹.
- Waterford Institute of Technology is a leading IoT and the largest outside of Dublin. It has over 10,000 full-time and part-time students, with the highest proportion of students graduating in science-related subjects.
- The Telecommunications Software and Systems Group (TSSG), a software development research organisation operating out of the IoT, has 50 researchers, with the potential for further expansion, and is the largest R&D capability in any IoT.
- FÁS has its Regional Training Centre in the Waterford Industrial Park.

Quality of Life

- Waterford Gateway offers a potentially high quality of life. Its physical location is attractive, it has a major river (the Suir) flowing through it, it is relatively close to an attractive coastline, and it has a historical urban centre.
- There has been significant emphasis in recent years on developing arts facilities in education, music, drama and literature.
- Tourism has developed over recent years, with attractions such as the Waterford Crystal Visitors Centre and a number of golf courses proving popular, and this can be further developed, especially in the marine tourism sector.

Local Capacity and Leadership

- A progressive City Council has identified Gateway status as an important branding and marketing tool for the future development of Waterford.

⁵⁹ PACEC Economic Consultants; CSO 2002.



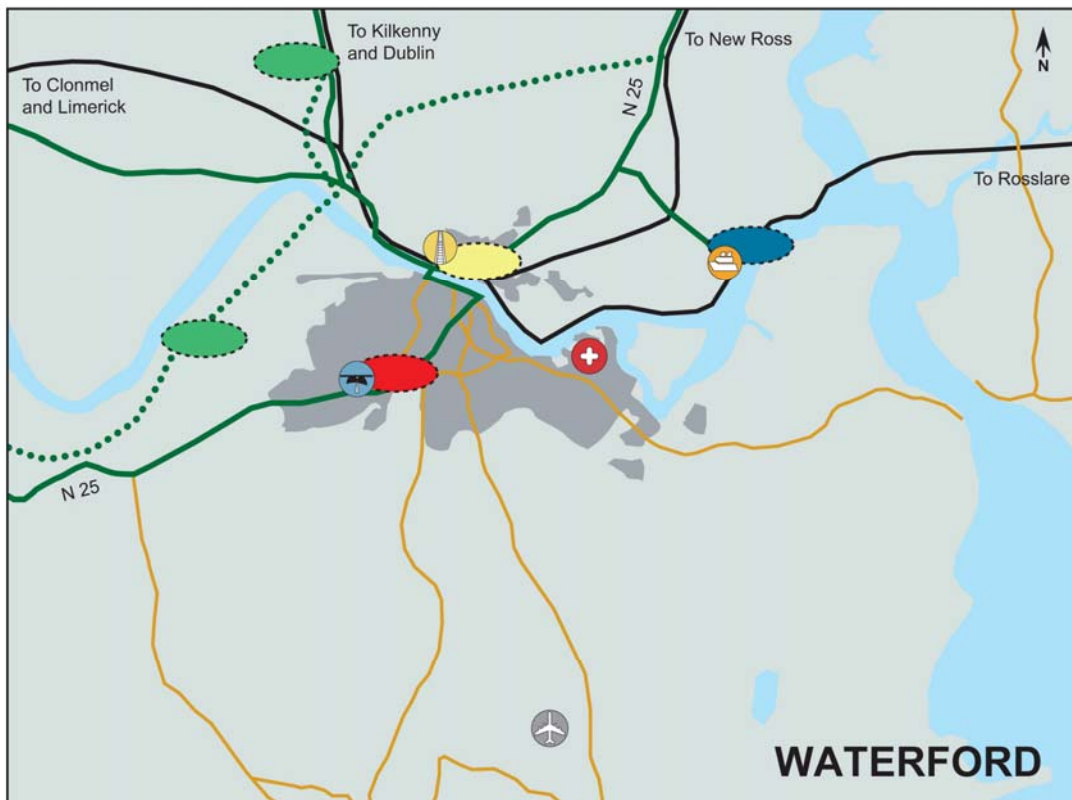
- An innovative development strategy for Waterford and its environs has been prepared and adopted by the relevant authorities and enables support for the development of the Gateway. An Implementation Group has been established.
- Achieving effective co-ordination in the planning and delivery of new development infrastructure across the administrative boundaries is now fundamental to driving the growth of Waterford Gateway.

Short-term Investment Priorities (3-5 years)

Short-term investment priorities have been identified on the premise that their implementation would represent ‘quick wins’ and would unlock the potential for accelerated growth of the Gateway and the region⁶⁰. Items have not been included where implementation is already underway. They are not listed in order of priority. Where appropriate, priorities with a spatial dimension are indicated on the accompanying map.

- Completion of the **M9 motorway and N25 bypass** (including an outer ring road and new bridge) within the time-line of 2009-10, as cited in ‘*TRANSPORT 21*’, is regarded as critical;
- The **North Quays** offer significant development potential and could become a key economic focal point in the city e.g. as a retail and/or leisure area, possibly with iconic architectural design;
- There is a need to continue **investment in the IoT**, especially its TSSG Business School and School of Life Sciences, maximise links between the Institute and industry (through ensuring both high quality and relevant courses for a changing sectoral profile toward internationally traded services and life sciences), and through research and development activities and supports;
- Enhancement of **port facilities** at Belview to bring the site up to full marketing potential;
- The IoT and the other key stakeholders (enterprise agencies, local authority, other State bodies, business) need to formulate a **shared innovation strategy** for the Gateway and for their respective roles within this.

⁶⁰ See note in Section 1.3 concerning the source of priorities.



Short-term Investment Priorities – Challenges and Barriers

- Existing tax incentive mechanisms are due to expire at during 2006, and the outlook is bleak for a new round of development incentives. Development incentives would have a key role in promoting the development of areas such as the North Quays in Waterford and associated industrial areas.
- Prioritisation of the resources necessary to deliver on the planned road improvements.
- The lack of university status for WIT is an often-cited issue in terms of attracting increased investment in R&D and potential for postgraduate research. Chapter 4 considers this issue further, in the context of the national needs, suggesting that increased co-operation between existing universities and IoTs in all Gateways may be a way forward.

Longer-term Priorities

Longer-term issues were also highlighted by the local authorities and the enterprise development agencies during the course of the study. Although the impact of these may be long-term in effect,



certain actions must be taken now in order to put supporting initiatives in place. Such longer-term priorities include:

- The need to improve road and rail access from Waterford to the other Gateways;
- Need for a third bridge crossing and further development of urban distributor roads to facilitate the continued development of the northern environs of Waterford;
- The development of the airport within the parameters of national aviation policy is also a longer-term goal, although its location (south of the city) and Waterford's proximity to other airports is likely to remain a constraint.



4

Gateways: What Needs to be Done?



Gateways: What Needs to be Done?

Chapter Summary

- In relation to road investment, key priorities are completion of the major inter-urban national motorway network and investment in key secondary and non-national roads in and around the Gateways.
- Improved public transport services within Gateways are also required. While the most pressing needs are in the GDA, the other established cities also face challenges, and early consideration of the issue is needed in the emerging Gateways if later “catch-up” problems are to be avoided. Bus-based solutions are vital, especially in smaller centres, and early clarity regarding the bus regulatory regimes is essential.
- Continued upgrading of the enterprise base in all Gateways is needed, especially where more traditional industrial bases are being challenged by lower-cost competition. Non-agency assisted enterprise such as retail and market services is also vital, and appropriate planning and other regulatory approaches can help.
- The intertwined areas of education, skills and innovation is fundamental to Gateway success, and has been identified as a key issue across all the Gateways. There is a need for a more co-ordinated and focused effort to bring together all the key stakeholders – higher education institutes, enterprises, agencies and Local Government – to this end.
- The smaller Gateways face particular challenges in developing the technological capacities of the enterprise sector. In addition, new priorities will merit attention including non-technological innovation, more co-operation with institutions in other Gateways, and more collegiate working across individual smaller IoTs.
- The urban quality of life is also a key to Gateway growth. Gateways must be attractive places, not only to work and invest in, but also to live in and visit. Many of the Irish Gateways, despite pleasant natural settings, face challenges including traffic congestion, lack of pedestrianisation, urban decay and lack of amenities. This requires investment involving better co-ordination across various separate Departments and public service areas, and between national and local planning systems.



4.1 Mixed Group with Mixed Needs

4.1.1 Basic Features

A key finding from Chapter 3 is the extent to which the nine Gateways differ. Obvious contrasts are Dublin’s size versus all the rest, and between the original five NDP Gateways (the established cities) and the four newly designated Gateways. This latter contrast includes the five cities having Councils whereas the four new ones involve a mix of one or more County Councils and Borough or Town Councils.⁶¹

Other basic differences include different types of locations, e.g. all but the Midland Gateway are in a coastal location. Some Gateways are polycentric in nature, such as Athlone/Mullingar/Tullamore. Letterkenny is also part of a polycentric Gateway, linked with Derry in Northern Ireland.

The scale of the individual Gateways also varies substantially, and not just vis-à-vis Dublin. Including immediate environs, Cork is six times the size (in population terms) and around ten times the size of Sligo or Letterkenny. In enterprise terms they also differ. In this as in other contexts, Dublin is clearly in a league of its own as the country’s main international Gateway. Cork, Limerick/Shannon, Galway and Waterford are also significant in these terms, with a much smaller current role for the new Gateways.

4.1.2 Gateway Populations

The NSS envisages Gateways having “a large urban population (of the order of 100,000 and above) set in a large urban and rural hinterland” (NSS Figure 3.1). For the existing Gateway (cities, towns and immediate hinterlands) this will be a challenge in some instance, and is already surpassed in others.

Gateway	Population 1996		Population 2002		Growth 1996-2002	
	City/ town	City & Environs	City/ town	City & Environs	City/ town	City & Environs
Letterkenny	7,606	11,996	7,965	15,231	4.7%	26.9%
Galway	57,363	64,904	66,163	75,789	15.3%	16.8%
Midland	24,952	38,075	26,448	42,655	6.0%	12.0%
Limerick/Shannon	59,850	87,076	62,251	95,559	4.0%	9.7%
Dundalk	25,762	30,195	27,385	32,505	6.3%	7.6%
Sligo	17,786	18,509	18,473	19,735	3.8%	6.6%
Dublin	481,854	952,692	495,781	1,004,614	2.9%	5.5%
Waterford	42,540	44,155	44,594	46,736	4.8%	5.8%
Cork	127,187	179,954	123,082	186,177	-3.2%	3.5%
Gateways Total	844,900	1,427,556	872,142	1,519,001	3.2%	6.4%
National Total		3,626,087		3,917,203		8.03

SOURCE: CSO CENSUS OF POPULATION

Table 4.1 shows that steady population growth has been experienced within each Gateway and its immediate environs between 1996 and 2002. Letterkenny, Athlone/Tullamore/Mullingar and Galway



had the three largest growth rates across all Gateways from 1996 to 2002, with double-digit levels in the city/towns and environs. The lowest growth rate was in Cork, where the City Council area population (excluding environs) actually fell although its environs of course grew.

4.1.3 Gateway Hinterlands

As described in Chapter 1, key to the NSS Gateway concept is the fact that the urban centre is not a stand-alone centre, but a growth driver for its wider hinterland (i.e. beyond the city, town and immediate environs), and is the centre to which people within that hinterland may gravitate to work, trade, shop, access services, use amenities and visit for leisure and cultural facilities. The extent of the catchment area for each Gateway is therefore an important factor in implementing NSS objectives in each location. Analysis undertaken by the International Centre for Local and Regional Development at NUI Maynooth into catchment areas for the NSS Gateways, based on travel to work patterns from the 2002 Census, is shown opposite in Figure 4.1.

This analysis shows travel to work patterns around the Gateways, with patterns getting darker closer to the Gateway. Data refer to the percentage of those in a DED travelling to work in the relevant Gateway. It also highlights the greater extent of the catchment areas of some Gateways, with particularly significant catchment areas around Cork, Limerick and Galway as well as Dublin, and smaller catchments for Waterford, Sligo and Dundalk. These smaller catchments reflect not just the relative size of the Gateway, but also other factors – the border in the case of Sligo and Dundalk, and Kilkenny and Wexford in the case of Waterford. Letterkenny has a wide geographical spread in terms of its catchment area, although the actual number of people living within this area will be smaller in scale than those of the other Gateways. Finally, the Midland Gateway also emerges as having quite a large catchment area. As already highlighted in Chapter 3, the individual Gateways are all different in this respect, influencing their individual investment priorities.

4.1.4 Gateway Development Plans and Strategies

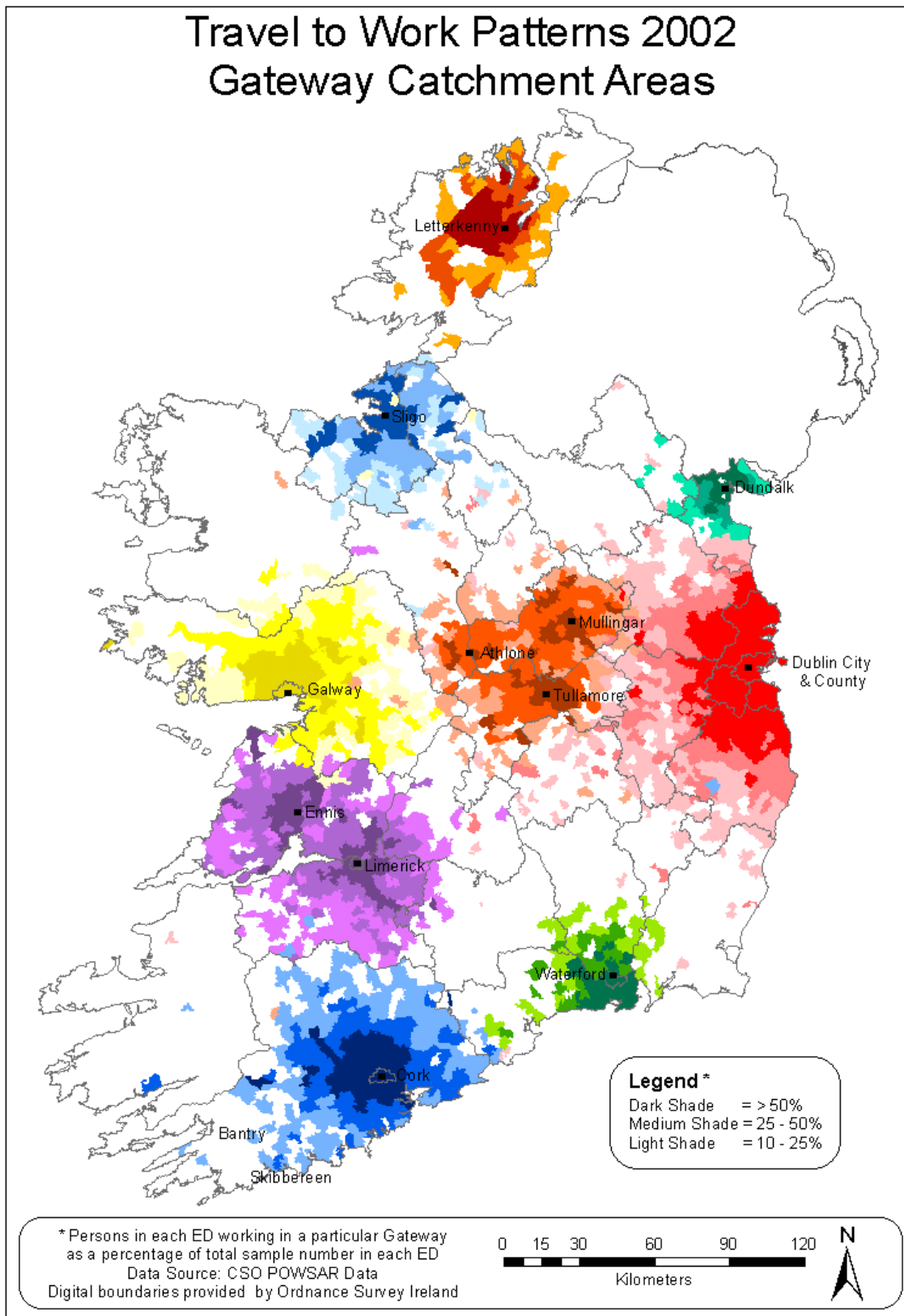
As part of the study, we examined the recent development plans and strategies for each of the Gateways. Local and regional plans and strategies in individual Gateways generally acknowledge the policies and priorities of the NSS, and include objectives and practices to deliver on Gateway status. The regional mechanism to drive development of the Gateways are the individual RPGs, augmented in a few cases through measures outlined in local LUTS documents such as the CASP and the Galway Transportation and Planning Study.

While focused on attaining the NSS-designated critical mass required to deliver on Gateway status, the RPGs outside the GDA also seek to provide a counter-balance to the GDA. Furthermore, sustainable development is a stated key principle of each RPG document.

⁶¹ Of the six individual towns involved (Sligo, Dundalk, Athlone, Mullingar, Tullamore, Letterkenny) all are Town Council areas, except Sligo which is a Borough Council.



FIGURE 4.1: GATEWAY CATCHMENT AREAS



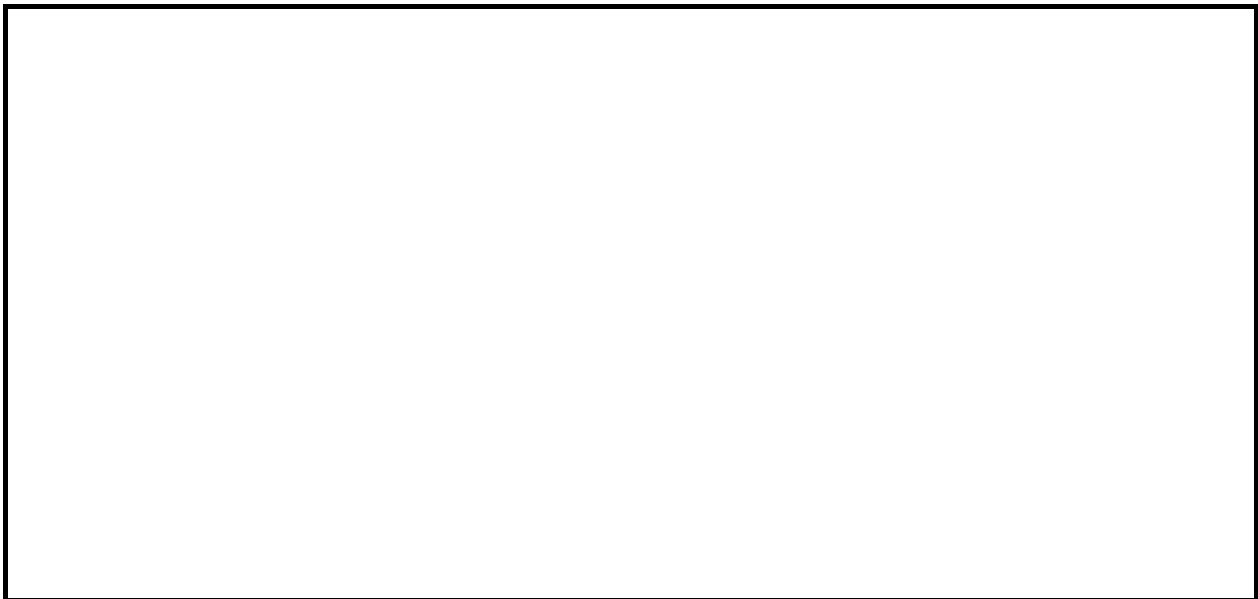
SOURCE: ICLR, MAYNOOTH



The achievement of critical mass is recognised as crucial to the economic development of the Gateways. Critical mass is to be achieved in the plans through a strong emphasis on population, settlement strategies, improved services, infrastructure and employment. For example, the South-East RPGs highlight the fact that the Gateway status of Waterford is a key element in facilitating employment creation within the region.

Critical enabling investment priorities identified in the RPGs include:

- improvement of strategic transportation corridors;
- implementation of sustainable transport policies, such as improved public transport and provision of “green route” infrastructure;
- enhancement of existing airport and port facilities;
- improvement of strategic rail routes such as the Western Rail Corridor and the Midleton and Mallow rail proposals in Cork;
- promotion of linkages to other Gateways and Strategic Development Corridors;
- attraction of indigenous and inward investment.



The majority of individual local authority development plans relating to the Gateway towns and cities have been adopted following publication of the NSS. These plans reflect the objectives of delivering Gateway status within their planning timeframes, for example:

“... the dynamism of Gateways means that these are the areas where the clustering of economic activities occur, this is already in evidence in Galway particularly in the ICT and bio-medical fields of industry” (Galway Development Plan, 2005-11).

⁶² The Galway Transportation and Planning Study also provides a mechanism for the strengthening of its Gateway through detailed population growth and balanced settlement strategies.



The focus of many Gateways is to facilitate additional growth arising from NSS designations, for example:

“... promote and facilitate the growth of Dundalk as a major Gateway centre that can accommodate substantial population growth and act as a driver for development in the north of the country and wider surrounding region”.

Where development plans have been adopted prior to the publication of the NSS, such as plans for Athlone and Mullingar, they generally consulted the NSS background documents available at the time. Development plan policies and objectives have then been produced accordingly. This has ensured that the projected population growth and infrastructure provision, crucial to the delivery of Gateway status, have been considered at least to some extent.

All plans are subject to review following the statutory time-frame of six years. Those older plans, which do not specifically focus on Gateway issues, can then incorporate policies to deliver upon Gateway status (such as the Westmeath County Development Plan).

Priority investments identified in the development plans include: improvement of strategic transportation infrastructure, such as the completion of NRA roads schemes and the Galway and Waterford Bypasses; improvement of strategic rail infrastructure such as the Rail Corridor; improvement of infrastructure such as drainage, telecommunications and energy (for example, the proposed thermal treatment facility for Limerick); enhanced linkages to existing port and airport facilities, including those at Cork and Limerick/Shannon; promotion of cross-border policies and co-operation in the establishment of an all-island economy in Gateway regions, such as Letterkenny; provision of health and social infrastructure, such as hospital facilities in Dundalk; creation of employment opportunities and enhancement of core town and retail functions.

The time-frames of all the current plans lie within that of the NSS and generally identify policies to assist in the delivery of Gateway status. Linkages of Gateways across the country are also identified. Strong cross-border co-operation is a priority within the Letterkenny Gateway. Letterkenny’s future is strongly associated with Derry and to Northern Ireland’s Regional Strategy – “Shaping our Future”.⁶³ Growth is projected in the area over a 25-year time-frame, because of the NSS Gateway designation.

It is evident therefore that the existing formal plans and policies of the designated Gateways generally build on the NSS and have provided the objectives and policies for the achievement of critical mass and high quality infrastructure. The need under the next NDP is to utilise these, updated where necessary, as a basis for establishing and following through on appropriate Gateway-level investment priorities.

⁶³ *Shaping Our Future, Towards a Strategy for the Development of the Region*, Draft Regional Strategic Framework for Northern Ireland, December 1998.



4.2 What Needs to be Done – Infrastructure

4.2.1 Overview

Adequate physical infrastructure is fundamental to developing and expanding all Gateways, especially in the context of overall national population growth. This covers transport, water and waste, energy, and telecommunications. Major areas involve public investment, but energy and telecommunications also include commercial State companies and purely private sector firms.

Infrastructure in the Gateways and elsewhere has also been the subject of major investment during the period of the present NDP, and indeed beforehand. While naturally focusing on what needs to be done next to drive Gateway development, the significant progress already being made and currently underway is also acknowledged.

4.2.2 Road Investment

This area is the subject of major current investment, much of it directly affecting the Gateways through both major inter-urban and other national primary roads. The text box overleaf summarises the status of major Gateway-related investment under the current NDP.

Looking to the next NDP period, priorities from a Gateway perspective are:

- completion of the current National Roads Programme, and particularly the inter-urban routes;
- a focus on some key regional roads, especially those linking Gateways internally with each other and with their hinterlands;
- some key local roads, i.e. which are not national primary routes.

'TRANSPORT 21' reaffirms the Government's commitments regarding road investment in the 10-year period 2006-15. As shown in the accompanying map, this includes completion of the five MIU motorways, development of dual carriageways in selected other primary routes (including strategic links with Northern Ireland, important for the three Border Region Gateways), development of the Atlantic Road Corridor (linking Letterkenny, Sligo, Galway, Limerick, Cork and Waterford), and targeted improvement of a number of national secondary routes that are particularly important for regional development.

From a Gateway perspective, there is no suggestion here that transport investment resources should be moved away from completing the national primary routes. Within the national primary roads programme there may, however, be scope to consider the needs for links to the Gateways that are served by these, e.g. the link between the M6 and Mullingar/Tullamore. These are crucial for development of the Gateways.

We would also see scope for re-prioritisation of non-national road expenditure within regions and within local authorities themselves. In particular, there is scope to re-prioritise expenditure on non-national roads away from less populated and less trafficked areas and towards the Gateways and their environs. This could be achieved, for example, by using per capita expenditure more as a criterion in deciding non-national road allocations.



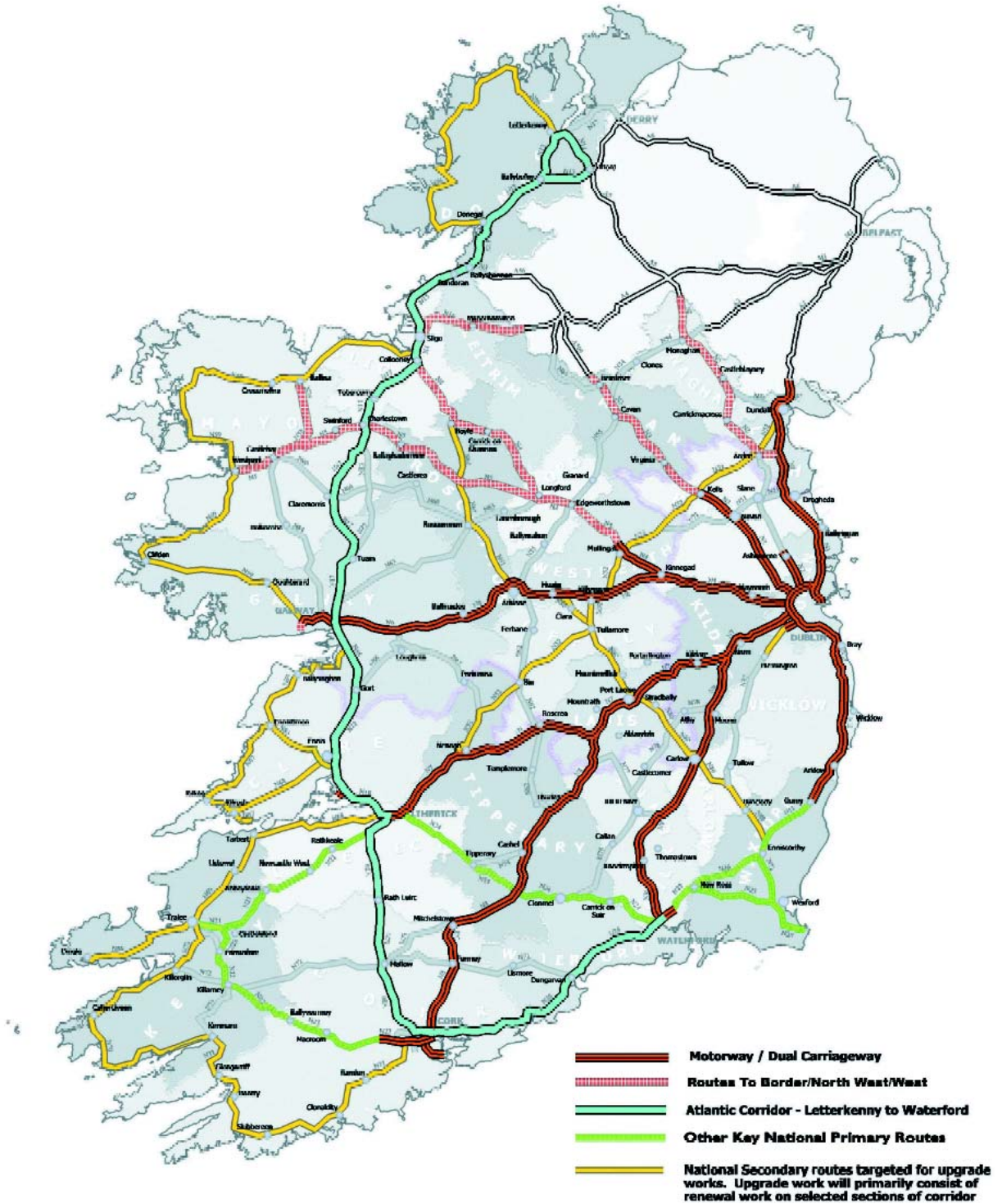
MAJOR NATIONAL PRIMARY ROAD INVESTMENTS AFFECTING THE GATEWAYS – SUMMARY OF PROGRESS (SEPT. 05)

- The M1 **Dundalk** Bypass opened to traffic on 26 September 2005, providing a continuous motorway from north of the town to Dublin.
- The M4 Kilcock-Kinnegad PPP Scheme is completed, while construction is also progressing on the N6 Kinnegad-Kilbeggan section of the **Dublin-Galway** route. The N6 Loughrea Bypass is completed. The Kilcock-Kinnegad Scheme, together with the N4 McNeads Bridge Scheme, is also fully completed, and provides dual carriageway/motorway standard road between Dublin and Mullingar.
- Connectivity between Mullingar and Tullamore in the **Midland Gateway** will be improved on completion of the N52 Mullingar Bypass (currently under construction). The Bypass will also benefit linkages between Mullingar and Athlone (via the N52 and the M6/N6).
- **Sligo** will benefit from the M4/N4 Schemes already mentioned, while traffic movements within the urban area have been catered for by the N4 Sligo Inner Relief Road, which opened on 2 September 2005.
- The N7 Dublin-Limerick road has been completed to dual carriageway/motorway standard between Dublin and south of Portlaoise. Phase 1 of the Limerick Southern Ring Road opened to traffic in 2004 (relieving the Centre of Dublin-Limerick-Kerry traffic).
- South of Portlaoise, on the N8 **Dublin-Cork** route, the Cashel and Watergrasshill Bypasses have been completed, construction is well advanced on the Fermoy Bypass, and the N25 Kinsale Road Interchange has been completed.
- Access to **Shannon from Limerick** is now catered for by dual carriageway standard road, including a new N19 access to the airport. Travel between **Shannon and Galway** will benefit from the Ennis Bypass currently approaching completion.
- Under the strategy being pursued for the N9 **Dublin-Waterford** route, priority is being given to commencing construction on the Carlow-Powerstown and Waterford-Knocktopher sections, i.e. a critical traffic congestion point on the network and a deficient section of the route. The N25 Waterford Bypass tender process is well advanced and construction has commenced.
- Within the **Dublin area**, the Port Tunnel will soon open following commissioning and safety checks, while Phases 1 and 2 of the M50 upgrade have commenced. The M50 is now complete following the opening of the South-Eastern Motorway.
- Regarding access between **Dublin and Letterkenny/Derry**, traffic is being encouraged to use the M1 motorway and the N33 Link to north of Ardee. The N2 Carrickmacross Bypass is complete, the Monaghan Bypass (Phase 1) is under construction, while the tender award proposal for the Castleblayney Bypass was recently approved.
- Significant improvements have been made to the N15, serving the **Letterkenny/Derry area and connections to Sligo** – the Clar/Barnesmore Gap, Donegal Town Bypass and Bunduff/Drowes River Schemes have been completed, and the Bundoran/Ballyshannon Bypasses have also been completed.

SOURCE: NATIONAL ROADS AUTHORITY, SEPTEMBER 2005



National Roads Network 2015















4.2.3 Rail

Currently all Gateways except Letterkenny are on the rail network linking to Dublin. We do not consider it economically justifiable that Letterkenny should be so linked, but would prioritise alternative good public bus services. Derry is linked to Belfast via the Northern Ireland rail network.

Significant expenditure is currently devoted to upgrading track and rolling stock. This should continue. From a Gateway perspective there is a particular need for improved service frequency and timing between a number of Gateways and the capital, notably Waterford and Sligo. This too is under way. Sligo and Waterford will both benefit from significant improvements and more frequent services (increasing from three to five daily services each way on the Dublin-Sligo line from mid-December 2005, and a two-hourly frequency on the Dublin-Waterford line from December 2007). This is all to be very much welcomed from a Gateway perspective. A summary of service improvements as listed in 'TRANSPORT 21' is shown in Figure 4.2.

FIGURE 4.2: PLANNED IMPROVED RAIL SERVICES: DUBLIN TO OTHER GATEWAYS, 2005-08

Dublin to:	Frequency			
	Peak		Off-peak	
	Hourly	Two-hourly	Hourly	Two-hourly
Cork				
Galway				
Limerick				
Waterford				
Sligo				

SOURCE: 'TRANSPORT 21'

The development of commuter rail services (where these are viable) is also to be welcomed. Apart from Dublin, developments are already under way in this regard in the Cork, Limerick and Galway areas (for maps of Cork and Galway plans see Chapter 2, relevant profiles), and the establishment of a rail link to Shannon Airport will shortly be the subject of a feasibility study.

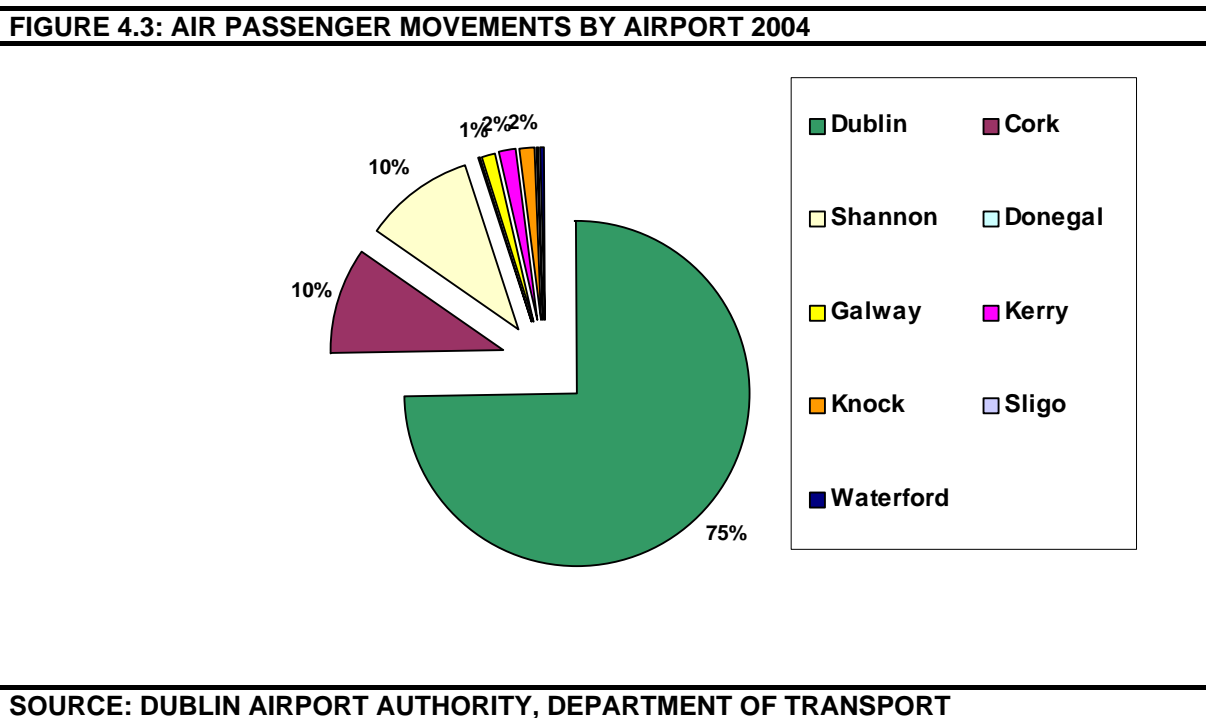
'TRANSPORT 21' also contains a commitment to phased re-opening of passenger services on the Western Rail Corridor.

4.2.4 Air Services

The three State Airports (Dublin, Cork, Shannon) account for the bulk of air passenger movements, with Dublin alone accounting for about three-quarters of these (see Figure 4.3). These have the scope



and capacity to expand to cater for future growth in overall traffic for the foreseeable future. Their size, scale and catchment areas mean that they inevitably attract a wide range of airline services to and from other locations. The primary role of the State Airports is complemented by the regional airports. Three of these (Sligo, Galway and Waterford) are located at Gateway locations. The two largest (Knock and Kerry), which facilitate low-cost operators such as Ryanair, are not located in Gateways, but they obviously play an important role within their respective regions. Also, Knock is relatively near Sligo, and Kerry services the Tralee/Killarney hub.



Passenger throughput at all regional airports has increased significantly in recent years. Total passenger numbers in 2004 increased by 42% on 2003 levels, for example. Since 2000, there has been an increase of 130% in passengers travelling through the regional airports. In recent years the number of air services available at most of the airports has also increased.

National policy on regional airports is to assist in optimising the contribution that the airports can make to balanced regional development. Through a range of support mechanisms, the Department of Transport seeks to facilitate, where practical, continued safe and viable operations at the regional airports and to encourage maximum commercial autonomy and initiative by the airports concerned.



The Department proposes to continue with the existing approach of funding the airports for safety and security needs and facilitating air access to the regions through contracts with airlines for selected Public Service Obligation (PSO) routes.⁶⁴

A new approach to funding regional airports is proposed under '*TRANSPORT 21*' and increased capital funding for targeted investment in regional airports was announced by the Minister for Finance in the 2005 Budget. Up to €50m will be available for targeted investment (capital expenditure on development projects) during the period 2006-10. The purpose of the new targeted investment scheme will be to provide exchequer support for investment in existing regional airports, where demand for additional air services can be demonstrated and where an economic case can be made to justify increased investment.

The new scheme will be formulated and implemented in the coming months, in line with Department of Finance Guidelines for Appraisal of Capital Expenditure Proposals. The analysis of investment proposals received from regional airports will include the identification of benefits to the Gateway/region necessary to justify investment. Funding available under the new scheme will be in addition to approximately €50m towards essential safety/security works at the six regional airports over the 10 years of '*TRANSPORT 21*'.

Our assessment is that existing aviation policy vis-à-vis the Gateways is reasonable, given inherited realities on the ground, the nature of the aviation sector, and overall national needs. Progress under the National Roads Programme is crucial as it improves access from the Gateways to the State Airports, which are, and are likely to remain, the premier international air access points.

4.2.5 Public Transport within the Gateways

The dependency on cars for internal passenger movements in Ireland is well known, and applies to the Gateways as well as elsewhere. As shown in Figure 4.4, reliance on private cars for travel to work is much higher in many other Gateways than in the GDA. Of course, the absolute scale of the problem of traffic congestion is much smaller elsewhere than in the GDA. The most pressing issues in this regard are clearly in the larger Gateways, especially Dublin. '*TRANSPORT 21*' also contains commitments on rail and bus transport improvements in the other cities – Cork, Limerick, Galway and Waterford.

That said, planning for the development of public transport at an appropriate level should be initiated in all Gateways so that they can facilitate pre-planning rather than having to “catch up” at a later stage in their development. Galway City, as an example, has formulated a transport plan, and the local

⁶⁴ Published EU Guidelines on aid to airlines departing from regional airports will have a substantial effect on the structure and assessment of funding of our regional airports by the Exchequer. The Guidelines must be implemented in full by 1 June 2007. The Guidelines are currently being examined by the Department of Transport and the regional airports will be consulted about their proposed implementation. The Guidelines will lead to more onerous obligations which will require that future Exchequer assistance directly relates to an analysis of reasonable costs, relevant revenues and profit levels.



authorities in consultation with the National Government departments need to take action on foot of this.

It is proposed that:

- All other Gateways that have not already done so prepare local area integrated land-use and transportation plans;
- They put in place the local mechanisms to implement this, relating not just to investment but also to housing and other major developments;
- The Department of Transport continue its liaison with the individual Gateways in this regard;
- Improved planning and implementation, including public transport and transport management in Gateways, be a candidate for establishing competitive “challenge funding” which would encourage the Gateways in this direction. The Department of Transport considers that funding, for e.g. good bus prioritisation proposals or for new rail lines, is already allocated on a basis that rewards good implementation and planning.

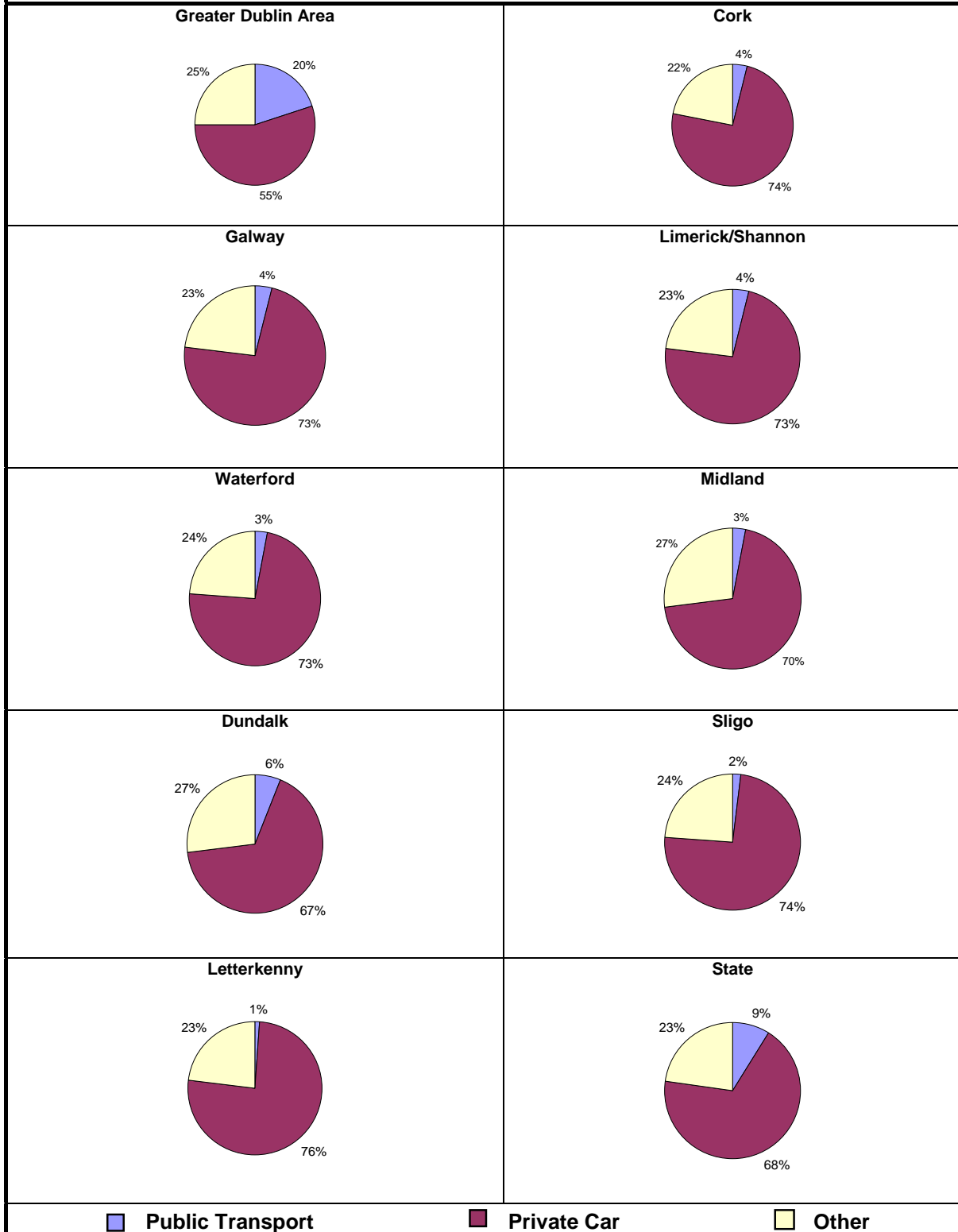
At national level, continued uncertainty regarding the nature of future bus deregulation is not helpful. Especially in the smaller Gateways, it creates a perceived blockage to relevant local authorities adopting a more proactive role. The measures taken to overcome this in Cork merit attention in the other Gateways.

Other obstacles to be overcome include QBCs and bus shelters, poor information, poor time-tabling and absence of “park and ride” facilities.

Also relevant here is the decision to roll out the existing Rural Transport Initiative (RTI) nationally. This decision was announced by the Minister for Transport in April 2005, and reiterated in ‘*TRANSPORT 21*’. The scheme is to be put on a permanent basis after the current pilot period ends (December 06). Exchequer funding will double in 2007 and increase thereafter to a level of about four times its 2005 level. It will support community-based local transport services in rural areas. Its focus, however, may be more in hinterlands of NSS hubs, county towns and other smaller urban centres than in those of larger Gateways.



FIGURE 4.4: MEANS OF TRAVEL TO WORK BY GATEWAY



Note: Data refers to county and city in relation to Cork, Galway and Waterford; Limerick county and city and Shannon town in relation to Limerick/Shannon; Tullamore, Athlone and Mullingar Towns for Midland; Dundalk town and Letterkenny town; and Sligo county.

⁶⁵ Data refers to County and City in relation to Cork, Galway and Waterford; Limerick County and City and Shannon town in relation to Limerick/Shannon; Tullamore, Athlone and Mullingar Towns for Midlands; Dundalk town and Letterkenny town; and Sligo County.



SOURCE: CSO CENSUS OF POPULATION 2002

4.2.6 Water Services

Alongside transport, water infrastructure is the other major area of public capital investment. Extensive expenditure has taken place during the periods of the current and previous NDP. For the current NDP period this is set to average €450m annually, involving investment in both water supply and waste water treatment facilities.

Much of the investment is being devoted to the Gateways. This was required by the need to meet the standards set out by the EU Urban Waste Water Directive. It has resulted in the opening of major new plants and collection systems in Dublin, Dundalk, Galway, Limerick and Cork as well as plants in immediate hinterland locations such as Leixlip, Swords and Midleton.

Looking ahead, there is likely to continue to be a need for major investment in this sector in the Gateways and elsewhere under the next NDP. Key drivers will be the faster than expected population growth (which means that even recently opened plants may come under capacity pressures in the not-too-distant future), as well as increased environmental standards and awareness of these. The Water Services Investment Programme 2005-07 contains evidence of such targeting of Gateway needs.

Other requirements will include co-ordination between investment in water and waste water treatment facilities and housing development as well as methods to encourage water conservation. Non-domestic water charges, in accordance with the “polluter pays” principle, are in place. The introduction of universal metering and volumetric charging is the target for the end of 2006.

Sizeable capital investment costs in the Gateways may at first sight appear very large in absolute terms. However, in this context it must be noted that there are well established economies of scale in water and waste water treatment plants. Larger plants, which are generally associated with urban areas, have lower unit costs. Therefore, in terms of meeting both EU standards and modern quality requirements generally, settlement patterns consistent with the NSS are more cost-effective than a more dispersed population.

4.2.7 Waste

Government waste management policy has been developed in a series of reports – “Waste Management: Changing Our Ways” (1988), “Preventing and Recycling Waste: Delivering Change” (2002) and “Waste Management: Taking Stock and Moving Forward” (2004). The policy approach focuses on integrated waste management based on waste prevention followed by minimisation, re-use, recycling, energy recovery and sustainable disposal of residual waste. A number of initiatives have been taken, including new legislation bringing Ireland into line with European best practice, adoption of a regional approach to waste management (with regional waste management plans), provision of



extensive recycling facilities leading to a dramatic expansion in recycling rates, introduction of pay-by-use charging systems and implementation of the Waste Electrical and Electronic Equipment Directive.

Significant progress has been made in reducing disposal of waste to landfill through increased recycling of household and commercial waste, especially packaging material. However, there are some negative trends, with total municipal waste and exports of hazardous waste increasing. The recently published National Strategy on Biodegradable Waste sets out an ambitious programme to achieve the diversion from landfill required by the EU Landfill Directive.

Government policy recognises that thermal treatment, with energy recovery, has a role to play as one element in the integrated approach to waste management; facilities will be subject to stringent controls through licences issued by the EPA and through subsequent licence enforcement and facility monitoring. While there are a number of hazardous waste incineration facilities in industrial plants, there are no waste to energy facilities for municipal waste. The regional waste management plans identify requirements in regard to waste to energy plants and residual landfill. Some progress has been achieved e.g. waste to energy plants promoted by the private sector and to be located in Meath and Cork have now received planning permission and waste licences. A facility for the Dublin region has entered these regulatory processes.

The EPA has statutory responsibility for the preparation of the National Hazardous Waste Management Plan and the existing plan is currently under review. All generators, managers and regulators of hazardous waste are required to operate within the legislation and the plan. Generation of hazardous waste needs to be prevented and minimised. Large quantities of hazardous waste continue to be exported. In order to comply with the principles of proximity and self-sufficiency in waste management it will be necessary to provide further facilities for the processing, treatment, recovery and disposal of hazardous waste through thermal treatment and landfill.

A start has been made to upgrade waste management in Ireland, and regional waste management plans have been drawn up. The focus now needs to be on the implementation of these.

4.2.8 Telecommunications

Widespread availability of open-access, affordable, always-on broadband infrastructure and services for businesses and citizens by 2005 was a key policy priority in Ireland's broadband strategy.⁶⁶ The Government has invested heavily in the rollout of broadband infrastructure to deliver the capacity necessary for delivery of advanced telecommunications infrastructure, using a number of different

⁶⁶ Department of Communications, Marine and Natural Resources, *Ireland's Broadband Strategy*, 2003.



technologies, and has also provided the necessary legal and regulatory framework for broadband access. International connectivity from Ireland to Europe, Asia and the US was increased through a Government-assisted intervention. A national fibre backbone has been provided by a number of operators – Eircom, EsatBT and ESB Telecom – with Government support, providing the Gateways with inbuilt resilience. One exception to this is Letterkenny, where plans for a back-up to provide resilience are in place but have not yet been delivered. Existing exchanges have been DSL-enabled to deliver broadband at local level. Steps have been taken in an attempt to open up the market to increased competition and to increase access to broadband in smaller towns and rural communities. However, there has been little progress in attempts to unbundle the local loop, and this continues to restrict real competition.

In order to improve local delivery of broadband, the Government provided support to local authorities to construct fibre optic cable metropolitan area networks (MANs), which are linked to the national fibre backbone. The local networks are built and owned by the local authorities, and fibre and sub-ducting is leased to telecoms operators. This approach has accelerated the delivery of broadband in smaller centres and has also reduced the number of road openings required to lay ducting for cable. MANs have been provided in all of the Gateways outside Dublin, and linking many of the Hubs. IDA Ireland Business Parks in all of the Gateways have been linked to the MANs. This has provided access to high bandwidth at competitive prices for businesses located in the Gateways and other towns served by MANs. As a further initiative to assist smaller towns and rural areas, the Government has introduced a Group Broadband Scheme for rural communities with a population of less than 1,500. The first phase of the scheme provided broadband access to 38 communities with a combined population of 36,000 people (including Killybegs, Oughterard, Caherciveen and Castlecomer). Phase 2 was launched in January 2005, and 119 projects have been approved to date.

The range and availability of telecommunications services and the cost of telecommunications have changed radically in Ireland in recent years with technological change and the liberalisation of the market. The quality of and range of services have improved and the cost of these services has fallen. An annual survey of the satisfaction of business users of telecommunications carried out for the Commission for Communications Regulation in 2005⁶⁷ shows there was a high level of satisfaction with the value for money of users of fixed lines. There was a lower level of satisfaction with the costs of mobile services (especially roaming charges), calls to another network or to fixed lines. For internet connections there has been a shift to higher-speed connections, and over 70% of respondents have broadband access through DSL, cable or wireless, although 16% said broadband was still not available in their area. The highest rate of dissatisfaction with Internet speeds was among those who did not

⁶⁷ Commission for Communication Regulation, *Business Telecommunications Survey*, January-June 2005.



have broadband access. Broadband users were also more satisfied with the value for money of their internet connections. A small number of companies were using Voice over Internet Protocol (VoIP) and interest in the service was high. Information from this survey was not available on a regional basis, however.

There has been very rapid progress in providing improved telecommunications in the Gateways and in the regions in recent years. The marketing of broadband availability needs to be stepped up to ensure that more businesses benefit from the cost savings that are available, however. At the same time, we are aware the telecoms market is entering a period of significant change. New technologies⁶⁸ are emerging at an increasingly rapid pace. The emergence of Next Generation Networks⁶⁹ is changing how services are delivered to consumers and how operators interact with one another. This presents a challenge for Ireland's telecommunications infrastructure and service providers to embrace and exploit such developments.

4.2.9 Energy

There are two aspects of electricity supply that determine availability in the Gateways. These are the capacity of the generation system and the capacity of the transmission system. A Generation Adequacy Report 2005-11 has been published by the Transmission System Operator (TSO), i.e. ESB National Grid or Eirgrid, in accordance with the provisions of the Electricity Generation Act 1999. The report uses international standards of risk assessment and a median demand growth rate of 3.9% for the next seven years, based on ESRI economic projections. New plant is identified to increase to 7,336 megawatts (MW) by end-2011, an increase of over 20%. This includes 150 MW at Aughinish, 382 MW at Tynagh, 400 MW at Huntstown, 137 MW in West Offaly, and 1010 MW of wind generation at various locations. The interconnector with Northern Ireland can also supply 300 MW, and an interconnector with Britain is being examined.

At any time all of the constructed capacity is not available due to planned maintenance and faults/break downs etc. Assumptions regarding availability of plant are critical to risk assessment. Every 1% in availability equals 100 MW. Average plant availability, at 77% in 2004, was poor by international standards. The owners of plant predict that this will increase in 2005 to a low of 81% or a high of 85%. The report concludes that if plant availability performance stays at its 2004 level of 77% there will be a deficit of 1400 MW in 2009, if it improves to 81% there will be a deficit of 600 MW in 2011, and if it improves to 85% there will be no deficit in the period.

Therefore based on these figures, supply and demand are finely balanced and plant availability is the dominant determinant of the adequacy of generation capacity.

⁶⁸ Wi-Max, Wi-Fi, 3G, VDSL

⁶⁹ A Next Generation Network is a network that can provide a range of services independent of the network infrastructure, and can interconnect with multiple different types of network (although typically with a common IP layer), offering greater flexibility and efficiency for operators and end-users alike.



Transmission capacity tends to determine availability of electricity at local level. The TSO has produced a Transmission Forecast Statement 2005-11, which is consistent with the Transmission Adequacy Report. The National Grid Transmission system of 400 kV, 220 kV and 110 kV lines and support infrastructure will need to be reinforced to accommodate expected growth in demand. The forecast is based on the assumption that these planned reinforcements actually take place and locations that will be capable of accommodating large new generation are identified. These are at Cullenagh in Waterford (for large plant) and at Ennis, Limerick and Cahir (for smaller plant). An average annual increase in demand is expected throughout the system, and individual small demands up to 10 MW (average consumption of a typical pharmaceutical plant) can be accommodated at most of 22 selected 110 kV stations over the period. These 22 selected stations included all Gateways and some hubs.

There is a fundamental need to ensure availability of capacity to meet current *and* expected future demand from increased population growth and industrial development (particularly if locations wish to attract sectors with high energy requirements), and to provide security of supply in all the Gateways, with particular regard to current constraints at Waterford, Dundalk and Letterkenny. There are also concerns regarding the resilience of supply in Letterkenny, which currently is served by only one line. ESB National Grid is in the process of addressing these constraints, although planning periods are also relatively long-ranging (3-7 years) and planning difficulties and delays have been encountered to date in constructing new power lines.

The natural gas distribution system is much less extensive than the electricity system. That said, BGE has completed the construction of a natural gas ring linking Dublin, Galway and Limerick. Although the gas system links the major centres in the south and east, it does not currently serve the Gateways of Letterkenny or Sligo. That said, we are aware that any extension of the gas pipelines to these areas would need to be justified on an economic basis. BGE has over 8,910 km of distribution pipelines and approximately 1,965 km of high-pressure transmission pipelines with associated facilities. It services almost half a million homes, 17,700 business users and 7% of the electricity market.

4.3 What Needs to be Done – Enterprise and Economy

4.3.1 Gateway Economies

Systematic quantitative information on the economies of the Gateways (as opposed to employment of people resident in them but who may work elsewhere) is relatively scarce in Ireland. The industrial development agencies have data on employment in manufacturing and internationally traded services in the regions for their client companies, but given the agencies' responsibilities, this does not include the majority of other enterprise.



FIGURE 4.5: PRIVATE SECTOR EMPLOYMENT BY GATEWAYS*

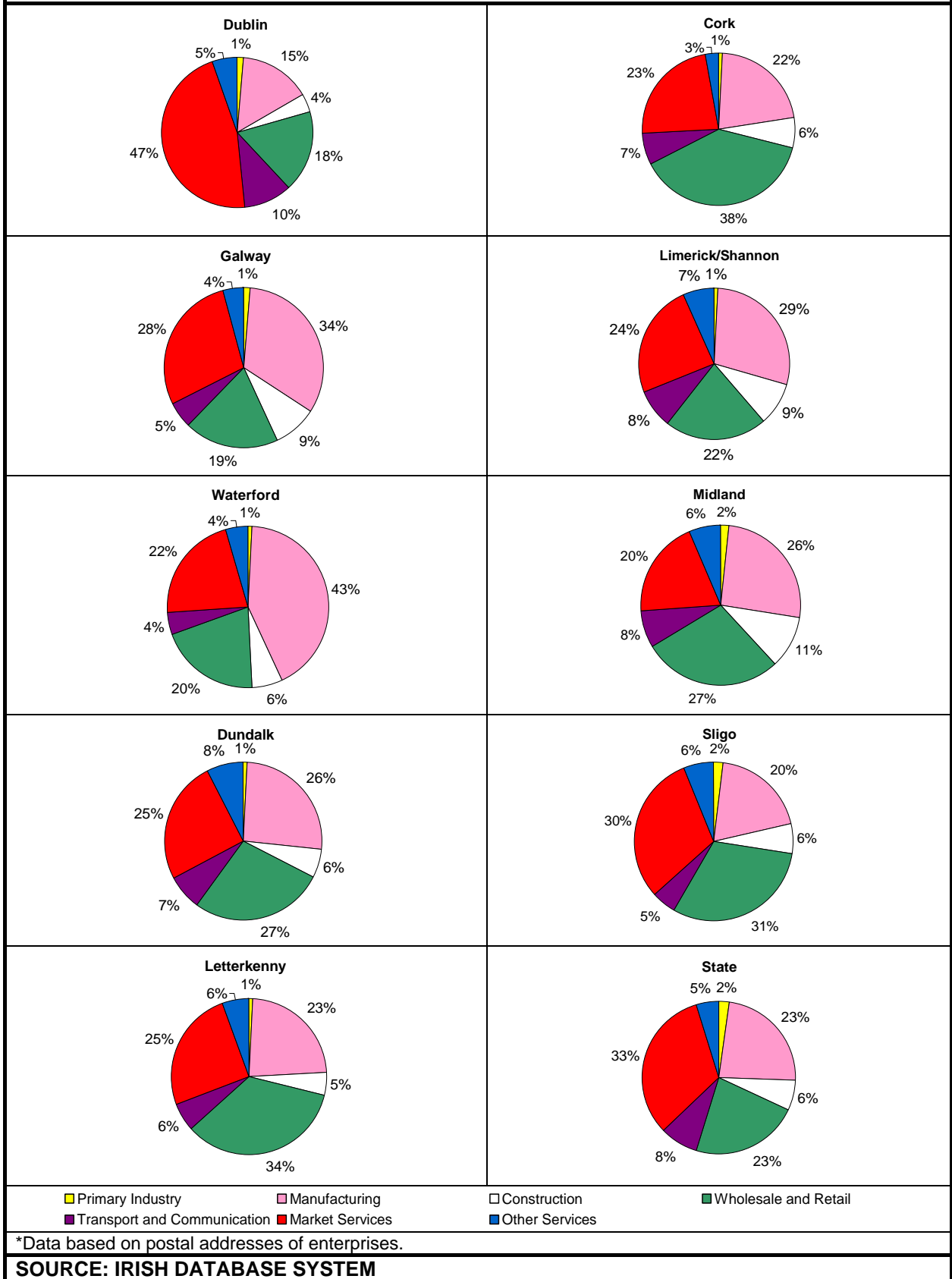




Figure 4.5 utilises the private database, Irish Database Systems, to show employment in the private sector in each of the Gateways. The data are based on postal addresses, and hence in some cases may not differentiate between cities and counties of the same name (i.e. Sligo, Cork, Waterford). This data may also be less than 100% comprehensive, but it gives an indication of the nature of the economies of the individual Gateways. The importance of manufacturing within the Gateways ranges from a high of 43% to a low of 15%. Construction employment ranges from 5-10% across most Gateways. Transport and communications are also generally in the 5-10% range, with Dublin at the upper end. Wholesale and retail is very important (as would be expected), ranging from 38% in Cork down to 18% in Dublin. Market services range from 47% of all private sector employment in Dublin down to about 20% in the Midland Gateway, Cork and Waterford. The picture is therefore one of economies that are not identical, and where enterprise and employment that is not within the remit of the enterprise agencies is also very important.

4.3.2 Enterprise Agency-assisted Employment

Turning to agency-assisted sectors, i.e. manufacturing and internationally traded services, Figure 4.6 shows the breakdown by sector in the broader regions – as distinct from the Gateways themselves. A total of nine manufacturing and three internationally traded services sectors are shown.

Across the country as a whole the main employer sectors are electrical/electronics, chemical and pharmaceuticals, food, other manufacturing, and financial and other services. However, Figure 4.6 clearly shows the preponderance of the more modern sectors in the regions with the main Gateway cities, and vice versa. For example, in the GDA about half of all agency-assisted employment is in internationally traded services, as against less than 20% in the Border Region and the Midland Region. Conversely, manufacturing remains much more important in the regions with smaller urban centres.

4.3.3 Tourism

Tourism, referring to all trips for whatever journey purpose that involve at least an overnight stay, is one of Ireland's most important internationally traded sectors and a key "export"⁷⁰. In 2004, the Irish tourism sector generated total earnings of €5.1b, which consisted of:

- over €3.4b in out-of-state tourism revenue (including over €3.2b in revenue generated by overseas visitors and nearly €200m in revenue generated by Northern Ireland visitors);
- nearly €630m in carrier receipts (i.e. fares paid to Irish air and sea carriers);
- over €1b in revenue generated by Irish domestic tourists.

Tourism is an important economic sector within most NSS Gateways. Several of the Gateways are already established as some of Ireland's biggest international and domestic tourism "honey-pots" (e.g.

⁷⁰ In this regard, it differs from other export sectors because its overseas markets "consume" the "product" in Ireland.



Dublin, Cork, Galway, Limerick/Shannon), while others have become developing centres for overseas and/or domestic tourists (e.g. Waterford, Sligo).

The Gateways are also highly important to the Irish tourism sector as a whole and a large proportion of tourism activity is attributable to the Gateways. For example:

- A very large proportion of all overseas tourism revenue generated in Ireland is earned in the Gateways. Dublin alone accounted for 46% of total overseas revenue earned in 2004;
- Similarly, a very significant amount of Ireland's total tourist accommodation stock is situated in the Gateways. In 2004, 30% of Ireland's total hotel stock was situated in Dublin as well as 23% of all paid serviced accommodation (i.e. hotel, guesthouse and B&B stock). In addition, Cork, Galway, Limerick and Waterford would all be among Ireland's Top 10 centres for tourist accommodation;
- The Gateways are also the locations for most of Ireland's top visitor attractions. In 2003 (the latest annual figures available), nine of Ireland's Top 10 fee-charging visitor attractions were found in the Gateways (namely Dublin, Cork, Limerick/Shannon and Waterford);
- Most of Ireland's major air and sea access points are found in the Gateways. This includes the three State-run international airports (at Dublin, Cork and Shannon), three of Ireland's regional airports (at Galway, Sligo and Waterford), and three of Ireland's four major sea ferry ports (Dublin Port, Dún Laoghaire and Cork). This means that more than 95% of all of Ireland's air and sea passenger movements are routed through the Gateways.

Our view is therefore that there must be a change of perspective in tourism planning, with a recognition that Gateways are essential drivers of tourism for their regions and not centres from which tourism needs to be diverted.

Future investment priorities are likely to continue to focus on developing more "flagship" tourism projects in the Gateways, particularly outside Dublin, while at the same time being conscious of environmental management issues, i.e. dangers of tourism congestion and overcrowding in established tourism centres. Tourism Investment in general needs to be very targeted, however, and appropriate to each Gateway's needs. In particular, the very strong (tax-driven) investment in tourism accommodation in recent years has now created concerns about possible overcapacity in some locations.

4.3.4 Investment Needs

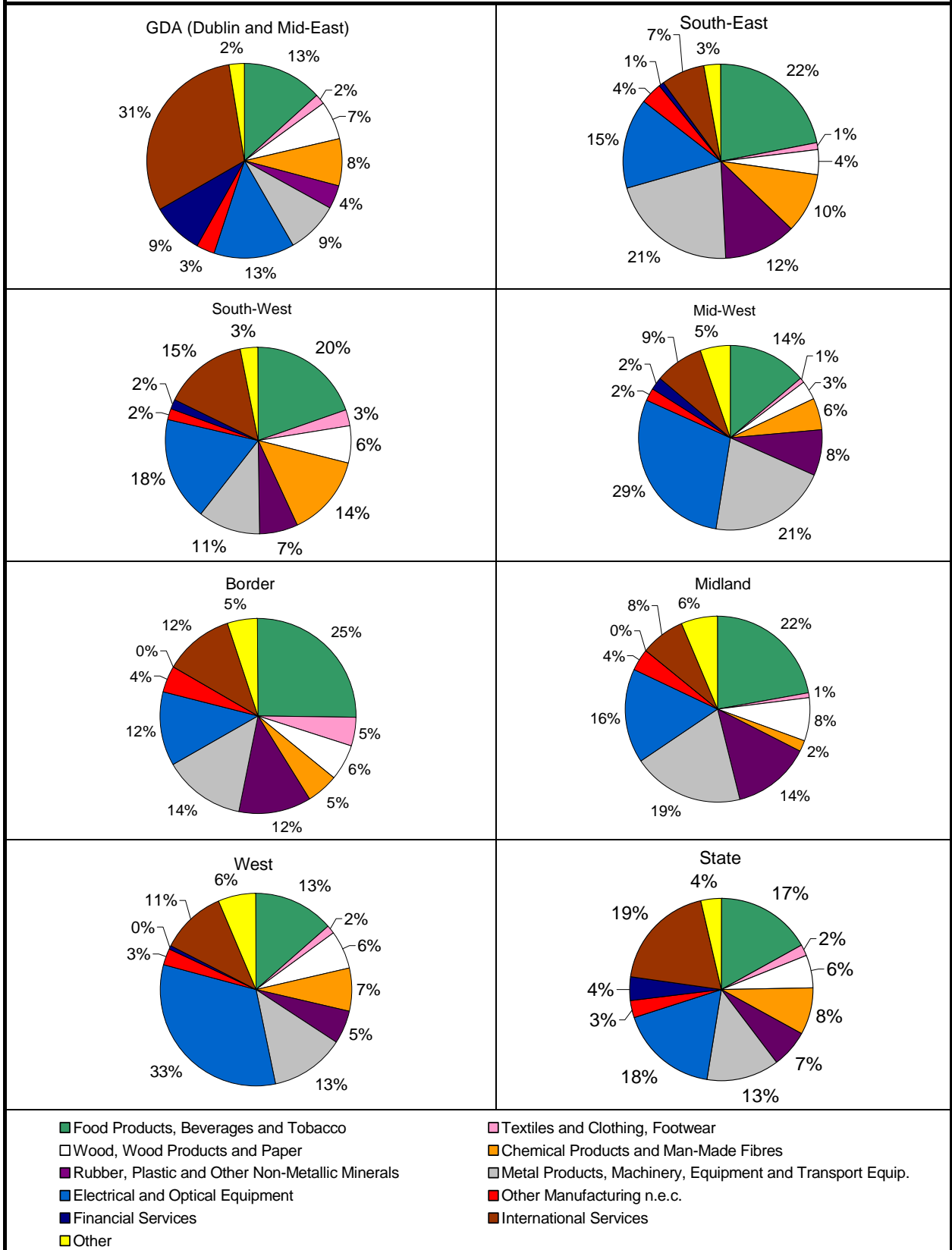
The overall requirement for all Gateways is the development and maintenance of a vibrant economy across all relevant sectors. This is one of the key underpinnings of a successful Gateway.

Within this overall requirement, particular needs are:

- For Dublin to maintain its position as an international Gateway, including investment, both in knowledge-based enterprise itself and in the surrounding conditions, including public transport;



FIGURE 4.6: AGENCY-ASSISTED EMPLOYMENT BY REGION



SOURCE: FORFÁS EMPLOYMENT SURVEY 2004



- That the other cities – Waterford, Cork, Limerick and Galway – develop further knowledge-based and higher-value sectors and activities to reduce dependence on more traditional sectors (particularly those that involve low margin/high volume activities). This process is already under way, and includes breaking into some of the newer sectors which are still largely in Dublin only, e.g. financial services;
- All the Gateways, especially the newer Gateways, should focus not just on development of agency-assisted employment in exported manufacturing and internationally traded enterprise, but also on other important growth areas. Candidates might be domestic leisure as well as tourism, retirement residences, private health care, overseas student education (second and third-level), office re-location from the GDA and of course retail;
- If further clustering is to emerge, there is a need for close alignment between agency sectoral priorities and investment in RTDI capability in universities and IoTs.

The enterprise development agencies could assist this process by updating their Regional Strategic Agendas, and incorporating in these a statement specifically about the Gateways.

To facilitate broadly-based economic and enterprise development, the Gateway local authorities should develop a stronger “economic development function” within their structure, in close liaison with existing agencies and of course not overlapping sectorally or functionally with the remits of IDA Ireland, Enterprise Ireland, Fáilte Ireland, FÁS, the CEBs and others (such as the Business Innovation Centres).

4.4 What Needs to be Done – Labour Force, Skills and RTDI

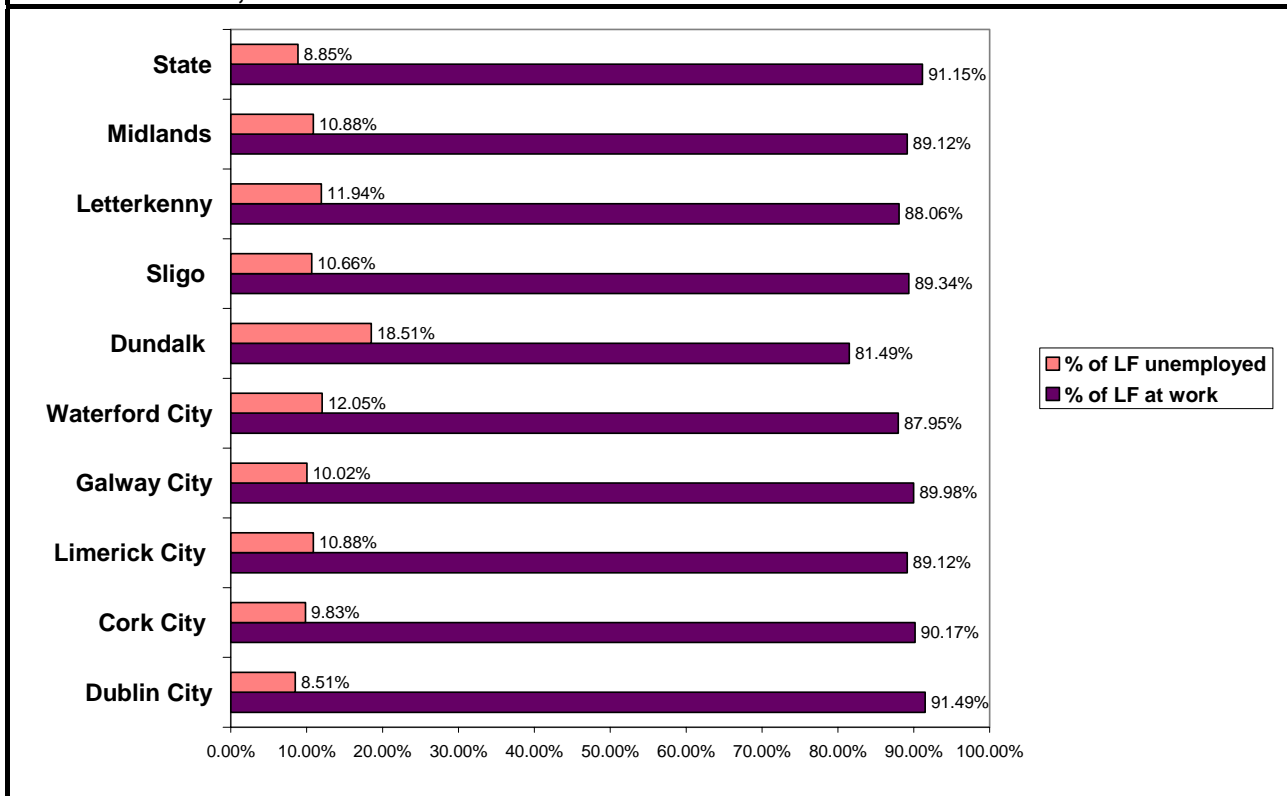
4.4.1 Labour Force and Skills

4.4.1.1 Labour Supply, Employment and Skills:

Figure 4.7 shows the proportion of those residents who state their principal economic status as being at work or unemployed within each Gateway. It therefore provides an indication of the relative positions of each Gateway with regard to employment and unemployment. The Census statistics suggest Letterkenny and Athlone/Mullingar/Tullamore have the highest proportions of adults in employment outside Dublin, while Dundalk has the lowest proportion. The Census also recorded a smaller proportion of persons in most Gateways that classified themselves as unemployed than was the case nationally. The main exception was Dundalk, with Letterkenny and Waterford also slightly above the national level.



FIGURE 4.7: EMPLOYMENT AND UNEMPLOYMENT AS PROPORTION OF THE LABOUR FORCE IN THE GATEWAYS, 2002



SOURCE: CSO, CENSUS 2002.

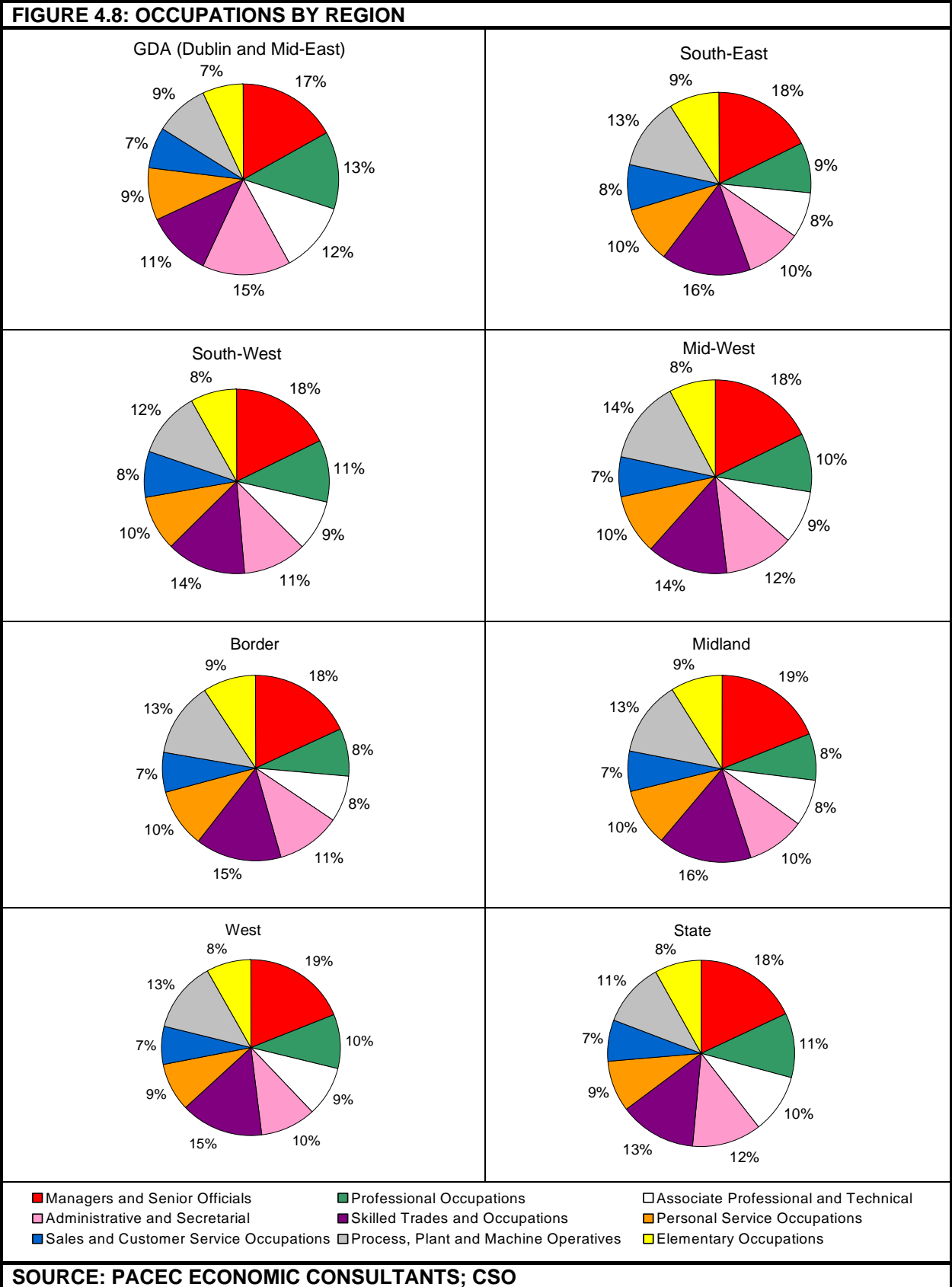
Figure 4.7 is intended only to offer a guide as to the relative position of each Gateway, and the findings highlighted should not be interpreted as the overall unemployment rates in each location. The Census statistics record the principal economic status of each individual, and do not provide an accurate portrayal of unemployment levels. A more reliable indicator of unemployment in Ireland is provided by the Quarterly National Household Statistics reports produced by the CSO. The report for March-May 2002, during which time the Census was conducted, revealed a national unemployment rate of 4.2%, significantly below the 8.8% of persons classified as unemployed by the Census. However, the Quarterly National Household Statistics reports do not provide a sufficient level of disaggregation to facilitate analysis of the individual Gateways, and hence the Census analysis represents the closest guide as to their relative positions with regard to employment and unemployment.

A critical element of competitiveness for any location is not only the availability of a large labour pool, but also that the labour pool is sufficiently skilled to attract higher value added industry to the area, and sufficiently adaptable to embrace new growth opportunities as they arise. Figure 4.8 shows the employment base of the regions in terms of occupation.

The GDA predictably has by far the greatest concentration of resident employees within the higher, “white collar” occupation bands, consistent with its status as the nation’s capital, the base of Government and a major international finance centre. This “city effect” is also apparent in other regions, with the South-West and West possessing a relatively high proportion of workers classified as either managers and senior officials, professionals, or associate professionals or technical staff – this

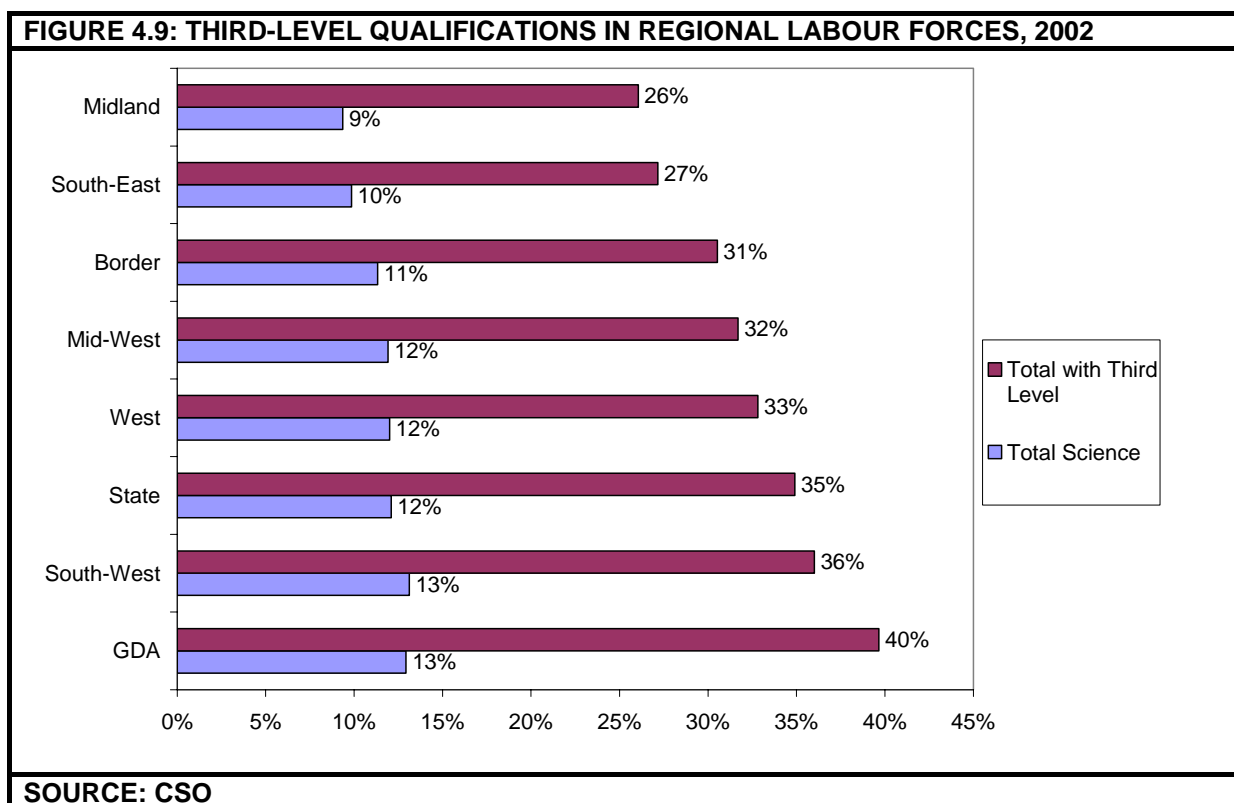


suggests that the presence of Cork and Galway within these regions results in concentrations of service sector and professional employment within these cities.





In Figure 4.9 we show the proportion of the workforce within each region with third-level qualifications and those with qualifications in science-related disciplines. Once again, this very clearly shows how these groups, especially the former, are more prominent in the more urbanised regions.



4.4.1.2 Skills Outlook for The Regions

PACEC Economic Consultants have recently undertaken a study on behalf of the Expert Group on Future Skills Needs regarding future skill requirements and skill gaps in the regions.⁷¹ This report considered how regional employment would develop over the period 2002-10, using both a baseline forecast in line with ESRI projections and also an assumption that Government, agencies, and local authorities implement a more effective regional policy, to secure a more balanced regional distribution of economic activity and national economic growth. This is of course consistent with the objectives of the NSS. The projections are based on the assumptions that there could be more effective steering of FDI to the regions outside the GDA, that firms would relocate from the GDA to regional locations (due to policy raising the competitive advantage of these locations), and that more effective measures to grow indigenous firms would be put in place in the regions.

The results indicate that the GDA will continue to secure the bulk of employment growth through to 2010, accounting for 60% of the increase. The main growth regions in the rest of the country are anticipated to be the South-West and the South-East, a factor attributed in part to specialisation within



the key growth sectors in these areas (ICT, medical devices, engineering, pharmaceuticals, international services), which are expected to grow to a greater extent than the rest of the economy.

Taking the effect of an NSS-inspired stronger regional policy into account, PACEC's findings illustrate that although Dublin continues to attract by far the greatest concentration of new employment, other regions can enjoy significant increases in employment and skills and better keep pace with levels of growth in the capital. The South-East, South-West and West are the regions projected to do best out of such a policy, with additional factors such as regional clusters (for example, medical devices in the West, centred on Galway, and pharmaceuticals in the South-West, centred on Cork) allowing disproportionate benefits to be realised compared to areas where such significant concentrations of growth activities do not exist.

4.4.1.3 Investment Needs – Skills

The data show that the regions with the strongest skills base are those with the largest urban centres. This generally confirms the existence of a virtuous circle of urban growth, knowledge-based occupations, high levels of skills and qualifications, and the presence of third-level institutions. Attractiveness of location to major employers will also be affected by absolute levels of suitable employees, further enhancing this pattern.

National strategies to promote world-class levels of education, training and RTDI are paramount to national competitiveness – and indeed at a national level, Ireland faces a challenge in each of these areas. All the Gateway locations have either a university or an IoT, which play an important part in the regional environment. Each has a role to play in education, research and innovation, and can build on their respective strengths and interaction with enterprise.

The interaction between firms and the 3rd level sector comes through strongly as an important issue, as does the need for flexibility and responsiveness on the part of the educational institutions. From an IoT perspective, this presents something of a challenge, as they currently operate directly under the aegis of DES, and changes to curricula and other dimensions can take a significant amount of time to agree and implement. The Minister for Education and Science has announced the intention to transfer funding responsibility for the IoTs to the HEA (as is the case with universities) in 2006. This move should proceed as quickly as possible, as it will create an opportunity to strategically consider the role and expectation of the IoTs in relation to regional and Gateway development generally,⁷² a process that could be initiated by the HEA (as the funding agency) with the IoTs, the enterprise development agencies and with Gateway local authorities.

⁷¹ PACEC Consultants, *Skills and Regional Development, A Report to the Expert Group on Future Skills Needs*, forthcoming, March 2006

⁷² This is already supported by the OECD. See OECD, *Review of National Policies for Higher Education: Review of Higher Education in Ireland*, Examiners Report, September 2004.



Alongside this, IoTs in the regional Gateways should prepare agreed strategies, jointly with enterprise agencies, local authorities and other local stakeholders, regarding their own mission, role, objectives and place in the Gateway and region. Means of overcoming IoT scale issues include increased co-operation and presentation of a joint national IoT image (see Inverness Case Study, Chapter 2, University of the Highlands and Islands).

A core overall conclusion is that, from a labour market perspective, Ireland is a relatively small country. In this context, it is important to ensure that there are no barriers to mobility of the workforce between regions and locations (e.g. through infrastructure, public transport, regulatory and other factors).

4.4.2 R&D and Innovation

4.4.2.1 Third-level Colleges in Gateways

As summarised in Chapter 2, international thinking about the development of Gateways emphasises the interlinked roles of third-level education, skills, R&D and innovation.

Third-level education institutions in urban centres play a series of roles, and these do not relate only to R&D and innovation. They have an employment effect by hiring highly skilled staff, they supply suitable graduates for local business, they generate local spending through the institution itself and the student population, they can be important attractors for inward investors and new residents, and they can contribute to the “buzz factor” of being a university town. The institutions in smaller Gateways are especially important from this perspective, and can be proportionally more significant than counterpart institutions located in the bigger Gateways.

All nine designated Gateways have at least one third-level institution, and some have more than one. Together they account for about 125,000 of the 130,000 full-time third-level student population. Gateways and third-level institutions are therefore in the Irish context virtually synonymous. As shown in Table 4.2, Dublin is dominant. It accounts for nearly half of all full-time third-level students registered in 2002-03, while Cork, Limerick and Galway have 10-15% each of all students, Waterford has 4% and the other four Gateways – through Athlone, Sligo, Dundalk, and Letterkenny IoTs – have 2-3% each.

Although there is a pattern of students electing to go to a nearby institution, the IoTs draw their student population nationally through the Central Applications Office facility. Student intake is not ring-fenced to regional locations (nor should it be) and the institutions should build on existing strengths to specialise and become truly national institutions.



Gateway	Institution	Number of Students	% of National Student Population	Student Pop as % of Gateway Pop	Full-Time Researchers as % of Total Researchers
GDA	University	38,428	46%	6%	57.5%
	IoT	14,648			
	Other	6,936			
	Total	60,012			
Cork	University	12,492	14%	10%	18.1%
	IoT	6,068			
	Total	18,560			
Limerick	University	8,142	10%	14%	6%
	IoT	3,602			
	Other	1,983			
	Total	13,727			
Galway	University	11,020	12%	18%	13%
	IoT	4,563			
	Total	15,583			
Waterford	IoT	5,711	4%	12%	2%
	Total	5,711			
Athlone	IoT	3,466	3%	22%	0.8%
	Total	3,466			
Sligo	IoT	3,441	3%	19%	0.7%
	Other	299			
	Total	3,740			
Dundalk	IoT	2,624	2%	8%	1.5%
	Total	2,624			
Letterkenny	IoT	1,927	2%	14%	0.4%
	Other	205			
	Total	2,132			
Gateway Total		125,555	96%	100%	99%
Other:					
Carlow	IoT	2,476	2%		0.19%
Tralee	IoT	2,422	2%		0.74%
Tipperary	Other	354	0%		
	Total	5,252	4%		0.93%
State Total		130,807	100%		100%

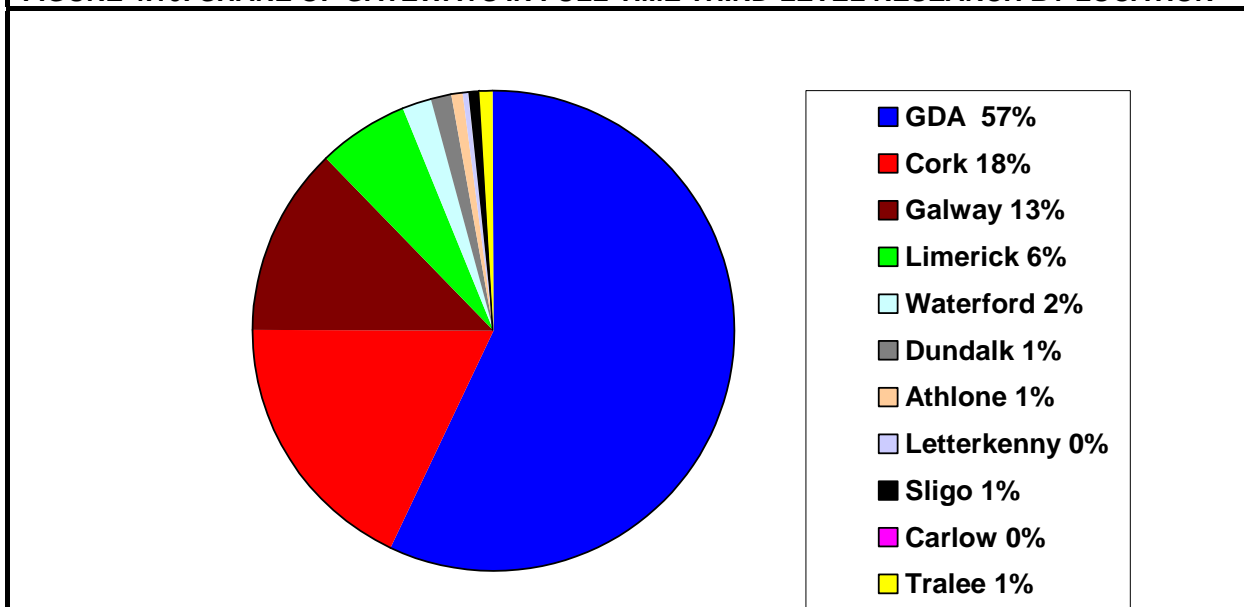
SOURCE: DEPARTMENT OF EDUCATION AND SCIENCE

4.4.2.2 Third-level R&D

In relation to R&D, in terms of absolute scale Dublin again dominates. Of about 3,600 full-time researchers in academia in 2004, about 2,000 (57%) were located in institutions in the GDA, and the combined share of the four university cities – Dublin, Cork, Limerick and Galway – is 3,384, or 94% (see Figure 4.10).



FIGURE 4.10: SHARE OF GATEWAYS IN FULL-TIME THIRD-LEVEL RESEARCH BY LOCATION



SOURCE: HERD 2004, FORFÁS

These data must not be over-interpreted. RTDI is broader than R&D, much R&D is done in companies themselves, and companies do not necessarily only link to third-level institutions in their immediate vicinity. However, the findings do show the challenge of RTDI development, especially in the smaller Gateways.

If absolute numbers are considered, this challenge is even more acute. As shown in Table 4.3, the total number of researchers in the IoTs in Waterford, Athlone, Sligo, Dundalk and Letterkenny is just under 200. In some individual IoTs, the number is down to 25 and below. If the distinction between disciplines is then added, the number of researchers becomes a handful, or in some disciplines zero. This raises question marks about the expectations potentially placed on individual IoTs in individual Gateways and whether, even if extended, these can realistically contribute significantly to internal or external critical RTDI mass.

More emphasis on the combined role of all third-level institutions, on access by firms to all third-level institutions, on networking of institutions (both universities and IoTs), and on ensuring firms have access to expertise wherever it is located, need to be considered. Other models, such as “virtual” institutions or combining institutions, should also be on the agenda.⁷³

A related issue is the extent to which there is a fit between the RTDI skills base and the sectoral make-up of enterprise in each Gateway and Region.

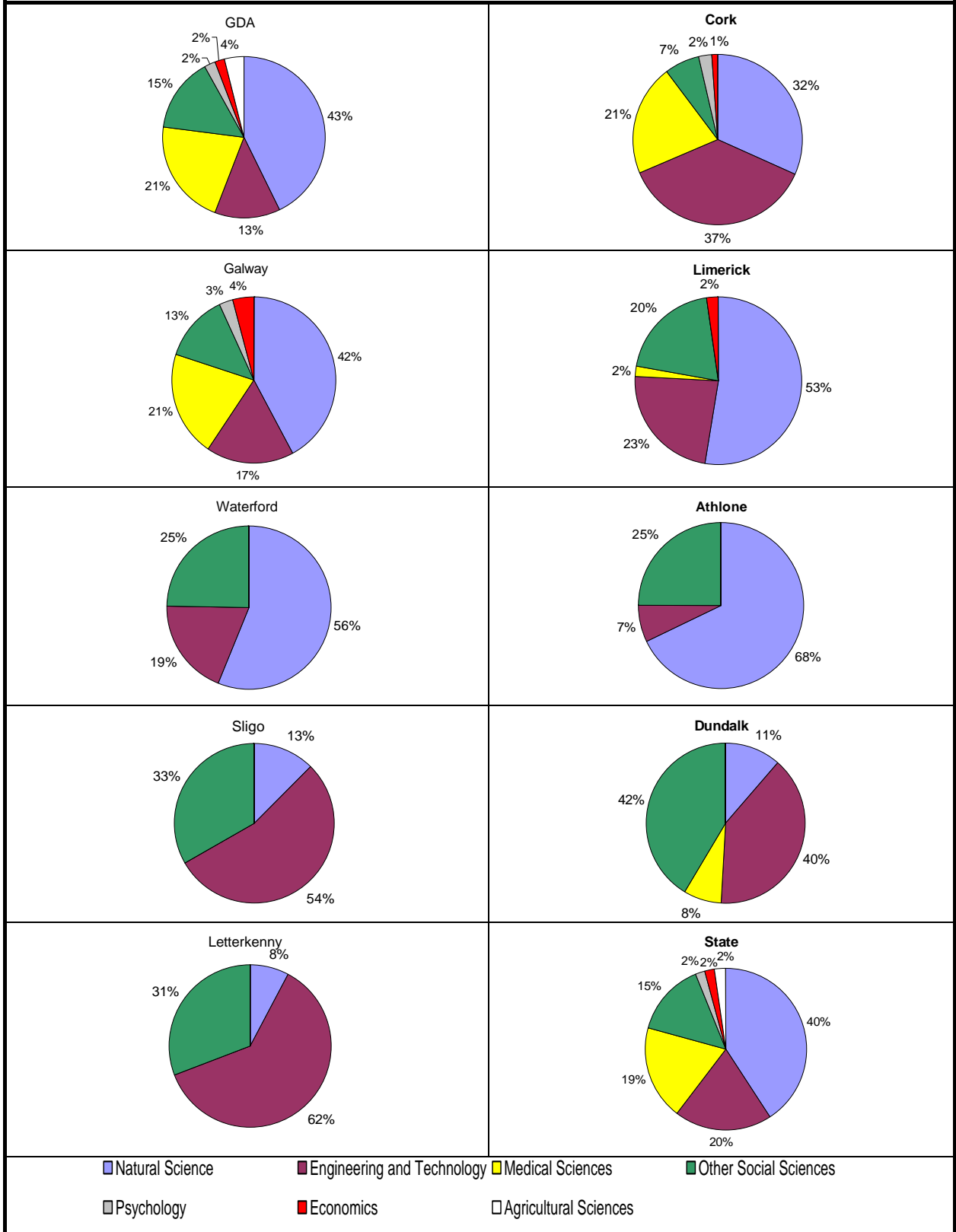
⁷³ The Scottish proposal for a “University of the Highlands” involving a number of existing constituent colleges is interesting in this regard – see Inverness Case Study in Chapter 2.



TABLE 4.3: NUMBER OF FULL-TIME THIRD-LEVEL RESEARCHERS BY GATEWAY AND DISCIPLINE, 2004								
Gateway	Field of Study							Total
	Natural Science	Medical Science	Agricultural Science	Psychology	Economics	Other Social Science	Engineering and Technology	
(a) Absolute Numbers								
GDA	877	435	78	42	43	310	269	2,054
Cork	205	137		15	8	44	239	648
Limerick	113	4		1	5		50	216
Galway	197	96		13	20	60	80	466
Waterford	41					18	14	73
Athlone	19					7	2	28
Sligo	3					8	13	24
Dundalk	6	4				22	21	53
Letterkenny	1					4	8	13
Gateways Total	1,473	679	78	71	76	527	705	3,609
Carlow	1						6	7
Tralee	10	3				11	3	27
State Total	1,484	682	78	71	76	538	714	3,643
(b) Percentage by Gateway								
GDA	43%	21%	4%	2%	2%	15%	13%	100%
Cork	32%	21%	0%	2%	1%	7%	37%	100%
Limerick	52%	2%	0%	0%	2%	20%	23%	100%
Galway	42%	21%	0%	3%	4%	13%	17%	100%
Waterford	56%	0%	0%	0%	0%	25%	19%	100%
Athlone	68%	0%	0%	0%	0%	25%	7%	100%
Sligo	13%	0%	0%	0%	0%	33%	54%	100%
Dundalk	11%	8%	0%	0%	0%	42%	40%	100%
Letterkenny	8%	0%	0%	0%	0%	31%	62%	100%
SOURCE: HERD 2004, FORFÁS								



FIGURE 4.11: PERCENTAGE OF THIRD-LEVEL RESEARCHERS BY DISCIPLINE IN EACH OF THE GATEWAYS



SOURCE: HERD 2004, FORFÁS



4.4.2.3 Investment Needs

From an RTDI and innovation perspective, the Gateways can currently be grouped as follows:

- The Greater Dublin Area, which is by far the largest national centre for third-level education generally and for R&D activity in particular;
- University Cities of Cork, Limerick and Galway, as university locations which have both a university and an IoT;
- The other Gateways, which each have an IoT and account for the balance of most of the remaining third-level education and third-level R&D activity, but which operate at a much smaller scale.

Issues in Dublin and the other university cities are very much synonymous with national RTDI policy. This has most recently been reflected in the Government's R&D Action Plan, *Building Ireland's Knowledge Economy*⁷⁴, which aims to establish and maintain an international position for Ireland in RTDI via its key institutions and, in line with EU targets, raise the level of R&D expenditure in the economy from its current level of 1.4% of GNP up to 2.5% of GNP by 2010. A Strategy for STI Investment Programme (SIP) 2006-13 to implement this is due to be published by the Government early in 2006.

The overall national challenge is to raise the international quality and status of RTDI, including that in third-level institutions. Even the leading Irish universities do not currently rank highly, if at all, in international rankings of third-level institutions.

While obviously there will be exceptions in this regard, the role of RTDI in other locations is more to ensure their role as strong regional centres within Ireland than to aim for international excellence in any kind of "across the board" sense. This mission will be affected by the role and activities of the IoTs, although other factors must also be considered. This includes the fact that the impact of R&D is not necessarily spatially limited and companies react with sources of information, advice and service throughout Ireland and internationally.⁷⁵ Also, the full burden of the RTDI development of the smaller Gateways cannot rest exclusively with the IoTs. Firms themselves obviously have a key role, and there may be scope to entice other S&T capabilities into a more proactive role, e.g. hospitals and State laboratory facilities. Again, Inverness in Scotland may suggest an approach for smaller Gateways, where a specialist medical research facility is to be shared by enterprise and the Regional Hospital.

Enterprise Ireland is already strongly involved in developing R&D capability in the IoTs, and this activity is very desirable from a Gateway perspective. So too is the impending transfer of the IoTs to the HEA, which should help increase their flexibility and move them away from being primarily teaching institutions. In the context of Gateway needs going forward, priorities will be to:

⁷⁴ *Building Ireland's Knowledge Economy – The Irish Action Plan for Promoting Investment in R&D to 2010*, Report to the Interdepartmental Committee on Science, Technology and Innovation, July 2004.

⁷⁵ D. Jordan and E. O'Leary, "The Roles of Interaction and Proximity for Innovation by Irish High-Technology Business: Policy Implications", ESRI Quarterly Economic Commentary, June 2005.



- Ensure the maximum possible fit between the RTDI capabilities of IoTs, the strength of existing local firms, and agency plans for the regions. To this end, the HEA and EI should develop a coherent and differentiated strategy for the strengthening of research and technological capacities in the IoTs in the context of enterprise development needs;
- Explicitly promote the development of clusters related to the above;
- Support, as EI currently does, technology transfer from other sources to the regions and Gateways through enhanced technology transfer activity;
- Enhance the engagement between IoTs and their wider local communities and local authorities;
- Give effect to the transfer of IoT funding responsibility to the HEA at the earliest possible date;
- Explore the potential of other RTDI and high-skill institutions in Gateways, especially emerging Gateways, to contribute to innovation and other activities in their areas;
- Encourage prioritisation by individual IoTs, in consultation with relevant stakeholders locally and nationally, of the areas in which they wish to aim for national class R&D excellence, and ensure that this broadly fits with local and regional strengths and priorities;
- Develop further networking across third-level institutions, as for example through the Lónra – Regional Higher Education Network in the BMW Region.

4.5 What Needs to be Done – Quality of Life

4.5.1 Overview

At the heart of the Gateway concept is the urban centres in their regions, and at the heart of a successful Gateway is a location where residents, businesses, shoppers, visitors and others experience a quality urban environment.

This has a number of important constituent elements:

- Quality public and private services;
- Recreation and amenity facilities;
- A quality physical environment, especially in town centres.

4.5.2 Public Services

A fundamental feature of Gateways is that they serve as regional service sectors, not just for their own residents but also for those of their hinterlands, i.e. they are the delivery point for services that cannot realistically be provided in smaller towns and villages. This includes private services, such as major retailing, and public services, such as healthcare and third-level education.

All existing Gateways are, of course, already providing all these services to varying degrees. For example, as described in the previous section, every Gateway has at least one third-level institution. Services are also important as a major proportion of employment in the Gateways.



The main requirement, from the perspective of the Gateways, is that their role and scale be taken into account in planning national service delivery and that there be an appropriate level of “spatial awareness” among national planners across all public service sectors. Related to this, there is scope for enhanced mutual communication in both the planning and implementation of service delivery, including the timing of implementation, e.g. ensuring that availability of primary schools is fully aligned with new housing development.

The CDBs were established to give effect to this objective, and their specific role is to help co-ordinate the local delivery of public and other services. Feedback from the Gateways suggests a mixed experience in this regard, with some positive experiences but also some less successful ones. From the point of view of some of the newer Gateways, there is the added complication that the CDBs operate at county and not Gateway-specific level.

4.5.3 Private Services

In relation to provision of services by the private sector in Gateways, important considerations are that:

- Overall expansion of the Gateways, especially the smaller ones, will allow a build-up of critical mass to provide both confidence and market opportunities for investors in such sectors as retailing, hotels, restaurants and leisure;
- Local land-use planning accommodates and encourages appropriate developments, including in town/city centres;
- Gateway local authorities, in consultation with relevant national agencies, adopt a more proactive role in relation to attracting mobile service firms in sectors outside the manufacturing and internationally-traded services remit of the enterprise and tourism development agencies, e.g. Irish headquarters of firms serving the domestic Irish market.

4.5.4 Urban Environment

All commentators regard the overall urban experience of cities to be an important factor in their success and development. This is an area that overlaps with a number of other dimensions, but includes such areas as the physical fabric of the cities, the extent of pedestrianisation and quality of traffic management generally, and the shopping experience, nightlife and general “buzz”.

Judgements in this regard can, of course, be somewhat subjective. However, it is probably a reasonable conclusion that most Irish Gateways, despite considerable progress, do not perform especially well in this aspect.

Investment needs here include:

- Current expenditure and general activity in relation to the basics such as litter;
- Ongoing improvement of the streets and streetscapes, including pedestrianisation;



- Better traffic management, linked to greater public transport generally;
- Urban renewal, in conjunction with appropriate private sector-led developments;
- Continued attempts to improve deprived urban areas, which in some instances are close to key and central areas of the Gateways. Aside from valid issues of social equity and social inclusion, and many of the State's main concentrations of excluded people are in the main urban centres, improvement of these areas could also make an important contribution to the state of their urban environment generally;
- Encouragement of construction of appropriate "signature" buildings.

4.6 What Needs to be Done – Local Capacity and Leadership

4.6.1 Overview

A finding that emerges from various international research, including that summarised in Chapter 2 (and the Annex), is the importance of governance and institutional arrangements in the development of Gateways. Many of the more successful developing Gateways elsewhere have been helped by the fact that they are recognised regional capitals, and as a result have become the focal point for regional resources and wider regional commitment, e.g., Barcelona and Bilbao in Spain.

Also important in this context is the cumulative and mutually reinforcing nature of the various elements – infrastructure, economy, skills etc. i.e. it's the package that counts. Any individual element alone is not enough, successful Gateways need to do well in all or most areas, and emerging Gateways may need to excel on a small number. So the "packaging" at Gateway level, the bringing of the elements together, is an important element in a strategy to grow a Gateway. Irish realities in this regard are distinct and, as elsewhere, governance in the Gateways is intertwined with governance in the country generally.

4.6.2 Gateway Institutional Structures

A number of key features can be highlighted that have implications from the specific point of view of the Gateways and their future development as envisaged by the NSS.

A number of key interlocking features are as follows:

- As is well recognised, Ireland has a quite centralised and department-based Government structure, with public service decision-making and resources primarily coming top-down from the Government through Ministers and their departments, to individual executive organisations. This system has advantages and disadvantages. A disadvantage is that it can lead to overly bilateral action on the ground by different arms of the State, and to insufficiently "joined-up" Government in practice. In the case of Gateways, it contributes to the absence of a single coherent position on individual Gateways at Central Government level. Instead, each department tends to look at the Gateway from the perspective of its own responsibilities, i.e. health, education, water services etc. This



contrasts with situations where, for example, Regional or Local Government structures may adopt a more holistic view;

- A further dimension of this is that public sector functions at local level are carried out by independent statutory agencies and companies, which each report directly to their own national headquarters and which are not and do not necessarily see themselves as being under any particular obligation to engage in co-operation and interaction with other public sector colleagues in the area. The extent of this can vary considerably by location, often depending on the preferences of individual managers;
- The range of functions and responsibilities of Local Government in Ireland is also relatively narrow, i.e. functions often carried out elsewhere by sub-national Government tiers is the responsibility of local sections of national organisations in Ireland, e.g. primary education, health, social services and public transport. This has limited the role of Local Government as an integrating body;
- In Ireland, the regional administrative level is particularly weak. Many national agencies have regional structures, but again these report vertically rather than horizontally. This means that Irish Gateways are not championed by their regions in any kind of popular or political way, and they are not necessarily perceived as regional capitals as are many dynamic regional cities elsewhere⁷⁶.

None of these issues are new and various co-ordination mechanisms have been experimented with over the years to try to address the local co-ordination issue, both in individual areas, such as local development, and more widely. None of this description constitutes an agreement in favour of greater devolution or regional administration. Indeed, in a small country the present system has advantages in terms of relative simplicity.

These issues do, however, take on a particular significance in the context of a policy to grow the Gateways. They make having the leadership, institutional capacity and commitment to the Gateway effort especially challenging, at a time when a more dynamic and integrated development effort is necessary. They also highlight the fact that, in a relatively centralised administrative system, national administration needs to be more region-focused and to be so in a coherent way, a point emphasised in the recent BMW Regional Foresight Report.⁷⁷

It is critical, therefore, that we identify a mechanism that provides invigorated Gateway leadership in a way that attracts cross-community and cross-organisational stakeholder buy-in, within the realities of the existing national and local governance structures.

⁷⁶ Existing regional administrative boundaries also vary across public organisations, and regional offices are neither necessarily congregated in nor indeed necessary in the “Gateways”.

⁷⁷ Border, Midland and Western Regional Assembly, *New Challenges, New Opportunities: Report of the BMW Regional Foresight Exercise*, Ballaghaderreen: BMW Regional Assembly, 2005.



4.6.3 Overall Gateway Requirements

In functional terms, there are three roles needing to be performed within each Gateway:

- (a) An executive function of being the focused driving force, best located within the relevant local authority, reporting to the City or County Manager, requiring the availability of a small number of appropriate and dedicated personnel. These personnel could be existing, new, or secondees;
- (b) An appropriate local back-up “outward” liaison structure, linking with those bodies key to the specific Gateway mission, including IDA Ireland, EI, universities, IoTs and Chambers of Commerce;
- (c) An “upwards” liaison function linking to the key relevant national Departments and Agencies, including DoEHLG, DETE, DCNMR, DCRGA, DoT, DES and the NRA at central level.

We make these proposals corresponding to these three functions – appointment of a “Gateway Co-ordinator” in the executive role, establishment of a small “Gateway Implementation Group”, and appointment of designated contact persons in Departments nationally. Executive agencies generally have regional or local representatives already. We return to these proposals in Chapter 5, Section 5.8.

Coupled with these developments at Gateway level is a need for a more co-ordinated approach centrally. The existing cross-Departmental NSS Implementation Team needs to be reinvigorated and to have active involvement by all Departments whose activities have a spatial dimension.

In setting this out, our main aim is to describe what we see as the main functions needed. How this is operationalised organisationally in each Gateway would be a matter for local finalisation. How the central level might operate in practice is also best worked out in discussion centrally rather than laid out in detail here. We revert to the matter again in Chapter 5.

4.6.4 Branding, Promotion and Marketing

Branding, promotion and marketing are important issues for Gateways, especially emerging ones. This applies to audiences both locally and nationally, especially for newer Gateways, as well as internationally.

The main organisations with a formal current role in this regard are IDA Ireland (in terms of its responsibility for promoting Ireland as a destination for inward investment), Tourism Ireland (in terms of the overall tourism destination marketing for the island as a whole), and Fáilte Ireland (which, with the Regional Tourism Authorities,⁷⁸ promotes domestic tourism). However, these agencies’ activities are constrained by the fact that they are national agencies with a national remit, and these remits are also specific to their own sectors, each with a regional dimension.

In contrast with the situation in other dynamic Gateways internationally, there is relatively little proactive wider promotion of many Irish Gateways that is consistent and broadly-based to all kinds of audiences.

⁷⁸ At the time of writing, plans are afoot to amalgamate the RTAs fully into Fáilte Ireland, with the exception of Dublin Tourism.



This is something that is generally done in other countries either by authorities or by various types of local partnerships involving a range of interests.

This general promotional role is a gap in the current armoury of the Gateways and one that needs to be addressed in terms of both responsibilities, (modest) resources, and consistent sophisticated effort. Marketing and promotional strategies, if they are to be successful, are more than simply signage, an occasional radio advertisement, and occasional events – important though these mechanisms are.

The organisation of major events, especially recurring (e.g. annual) events, are also significant in putting Gateways “on the map”, nationally and internationally, and keeping them there. The place of the Galway Race Festival and the Clarenbridge Oyster Festival in Galway’s success, the Ford Cork Week and Cork Jazz Festival in Cork, and the impact of the Tall Ships Race in Waterford in Summer 2005 confirms this. Other Gateways without parallel events should consider options that would dovetail with their own individual strengths.

Our view is that this role should be taken on by each local authority – in close consultation with the industrial development and tourism agencies (who could act as advisers) to avoid any overlap. It could also be funded by the local authorities, possibly with some initial central support via a competitive “challenge fund” or similar model.



5

Gateways: Conclusions and Proposals



Gateways: Conclusions and Proposals

Chapter Summary

Process

- (1) The relevant local authorities must co-operate in agreeing on and putting in place a structure to “drive” the development of each Gateway, backed with the resources that are necessary to enable the structure to act as the focus point for NSS implementation in each Gateway. This group would involve the local authorities, development agencies and the private sector, and should be on a cross-county basis where necessary. Specifically, we propose establishment of a “Gateway Implementation Group” (as a CDB Sub-Committee if appropriate), and appointment of a “Gateway Co-ordinator” in each location;
- (2) Having established structures and mechanisms for the development of each Gateway, the local authorities and their partners should, by September 2006, develop and reach mutual agreement on a 10-point implementation plan for the next five years, including the arrangements for co-ordinating development of the Gateway across administrative boundaries and supporting the joint delivery of the priority projects and interventions. Such mechanisms can interface with those established at regional level to oversee implementation of the Regional Planning Guidelines through the arrangements already in place;

Plans – Physical Infrastructure

- (3) The focused and prioritised implementation plan should be brought forward by the Local Authority outlining necessary physical plans and proposals to yield compact, sustainable and fast-growth cities. The Local Authorities should, on the basis of these plans and proposals, work with Departments and agencies in leveraging the necessary infrastructure to implement the plans. This should include such areas as non-national roads, water services, schools, amenities and cultural facilities, public transport, energy and communications grids;

Plans – The Wider Agenda

- (4) Informed by current and future enterprise needs⁷⁹, the enterprise development agencies should outline and integrate their plans, assessments and priorities for the Gateway so that these can be embedded fully in local and national implementation arrangements;
- (5) Building from existing initiatives⁸⁰, the development agencies for third-level education bodies in the Gateways should develop cohesive plans to maximise the possible fit between the RTDI capabilities

⁷⁹To cater for the existing enterprise base and potential future sectoral needs – for example, the availability of an Internet Data Centre in Cork would assist in the attraction of data-intensive activities, including digital content and bio-informatics sectors.

⁸⁰Including third-level incubation centres (supported by EI), Innovation Fund, Centres of Science, Engineering and Technology (SFI), Industry Liaison Officers.



of third-level institutes and the strengths of existing firms (and potential future sectors) for the region in order to stimulate sectoral network development. There is a need to continue to build capacity within the regions by supporting technology transfer from other sources to the regions and Gateways through the relevant agency initiatives;

- (6) There needs to be more effective and early stage cooperation between the relevant local and statutory authorities and developers to ensure the integrated provision of social and community infrastructure, e.g. schools, parks, sporting and cultural facilities with the development of new housing and other areas in the Gateways;

Funding

- (7) The NDP 2007-13 should contain a reaffirmation of the role of Gateways as drivers of growth in their regional economies and in the national economy with an explicit commitment to meeting their realistic investment needs. Whether that is achieved by having an identifiable Gateway-specific investment package, or by prioritising resources within the conventional “horizontal” or sectoral packages, is dependent on the overall structure of the NDP. However achieved, the result should be clear tailored investment packages for each of the Gateways, with similar themes but different emphases, depending on specific local requirements;

- (8) The Development Contribution Scheme system under Sections 48 and 49 of the Planning and Development Act 2000 should, taking account of local economic conditions, be harnessed for investment in local infrastructure in the Gateways, complementing and extending the impact of necessary national investment. Investment financed by such contributions should be branded accordingly, to build support for future development contribution schemes;

- (9) Individual government Departments should bring forward plans, within existing budgetary allocations, of capital investments and other resources to stimulate and support particularly innovative proposals for the Gateways, possibly on a competitive “challenge funding” basis. Previous examples in this regard are the Metropolitan Area Network initiative of the Department of Communications Marine and Natural resources and the Serviced Land Initiative of the Department of the Environment Heritage and Local Government⁸¹;

Monitoring

- (10) The existing Inter Departmental NSS Implementation Team should monitor progress in the development of the Gateways. As referred to in Section 5 above, a network of representatives of each individual Gateway Implementation Group should also be established to interact regularly with the national NSS Implementation Team and support it in its monitoring role.

⁸¹ These schemes invited proposals from a wide range of urban centres including some of the Gateways.



5.1 Introduction

This Chapter sets out the conclusions and recommendations of the report.

The overall objective of the study has been to give further impetus to the Gateway proposals set out in the NSS via:

- (a) Identification of key investment priorities within and across Gateways;
- (b) Identification of mechanisms through which these can be integrated into NDP planning and funding mechanisms.

Our conclusions and recommendations in this regard are set out here. The Chapter has ten sections. Section 5.2 addresses the question of why any action is now needed, i.e. why it is necessary to do anything differently given that the Gateways are all growing to varying degrees and are all attracting public and private investment. Section 5.3 sets out our overall conclusions regarding investment priorities; Sections 5.4-5.8 deal with our proposals under key Gateway characteristics as classified in earlier chapters (“economic infrastructure”, “enterprise/economy”, “labour force”, “skills and RTDI” and “quality of life”). Section 5.9 sets out our conclusions and proposals in relation to local capacity and leadership, and relationships with Central Government. Finally, Section 5.10 sets out proposals in relation to the role of the NSS in the forthcoming National Development Plan 2007-13.

5.2 Why Do Anything Differently Regarding Gateways?

This study examined:

- Whether the designated Gateway locations are aware of and acting on their Gateway status;
- Whether, on present trends, smaller ones are likely to develop towards full Gateway functionality by 2020;
- Whether there are priority investment gaps that need to be addressed under the next NDP to ensure this;
- Whether in practice national agencies, departments and funding mechanisms are taking account of national Gateway policy – as elucidated in the NDP, NSS and Department of Finance Capital Expenditure Guidelines.

The findings involve both good news and challenges. At local level, all the Gateways are growing and some are growing very rapidly, all have to varying degrees incorporated Gateway status in their development plans (including key projects needed to achieve this), many key infrastructural projects are already under way or in the pipeline under existing national plans (including ‘*TRANSPORT 21*’), and there appears to be considerable private sector investment in all of the Gateways.



The question therefore arises as to whether anything needs to be done differently at local or national level, or whether what is already required is happening anyway?

The assessment here is that, despite considerable success and progress, there is scope to do more about the Gateway, and to do it in a more focused manner because:

- Much Gateway demographic and economic growth involves a “rising tide” effect from overall national growth rather than exceptional and deliberate growth in the Gateways;
- Population growth nationally is now projected by the CSO to be well above NSS projections, and much of this will gravitate towards the GDA and its outer fringes unless Gateways are prepared economically, infrastructurally and otherwise to pro-actively manage even higher growth;
- For the smaller newly designated Gateways the 2020 target of 100,000 people is, on present trends, still very ambitious;
- While much key infrastructure in Gateways is in the pipeline (notably in relation to transport), significant needs remain in terms of other key priorities;
- The Gateway concept is a multi-dimensional one, and physical infrastructure is a necessary but not sufficient condition for new Gateways to grow into true cities;
- There are critical land-use planning issues around all the Gateways, and dangers of poorly planned “sprawl” in their environs, with consequent commuting growth, unless more co-ordinated planning and investment is addressed within the Gateways themselves (including more integrated land-use and transportation planning). In the larger established Gateways there is a more urgent need to address these challenges, but within the emerging ones there is scope for preventive action now before some of the less sustainable aspects of development in the GDA are repeated elsewhere.

5.3 Overall Conclusions Regarding Investment Priorities

Our main conclusions regarding investment priorities follow from the key findings of earlier Chapters. They are:

- Since each Gateway is different, and is at a different stage of development and has different prospects up to 2020, its infrastructure and other requirements correspondingly differ;
- In the case of infrastructure, many of the key projects are already known and many are already the subject of agreement or funding commitments. However, in a climate where there are ultimately no financial guarantees, it is still important that existing commitments to Gateways be reaffirmed in the next NDP;
- Within infrastructure there are also other important areas to which less explicit commitments exist, or indeed where no clear funding commitments may be evident. These include major road projects that are not “national routes”, e.g. key link roads within Gateways, and also areas such as urban



regeneration and arts and leisure facilities. In these areas Gateway-scale projects can still be beyond the scope of the more routine funding schemes available and will need special attention;

- As is evident, most classically by the case of Dundalk, physical infrastructure is not enough. Other things are needed in the Gateways including marketing and promotion, improved local co-ordination processes etc. Here, expenditure is required in areas that are of a more current nature, and which may not all fit clearly within any existing funding arrangements;
- Private sector interest, involvement and ultimately investment is also a key precondition for the success of the Gateways. Public policy, including public investment, must be seen as a means of leveraging private sector investments, not only via PPP but more widely, by providing the confidence and context within which increased private investment will take place;
- The enterprise base in the Gateways is vital, but must be seen as wider than inward investment or internationally traded enterprise. Other types of enterprise including retailing, leisure, domestic recreation and tourism, and a variety of services are also vital to the growth of locations and the well-being of their populations. Such enterprise is not within the remit of national agencies to promote and there is scope for them to be brought within a more broadly-based enterprise and economic vision for the Gateway as a whole;
- Within the Gateways themselves, and in their relationship with the Government departments and agencies, there are important issues of leadership, dynamism, co-ordination and institutional capacity which must be addressed. This is because there often needs to be a clearer sense of who or what is driving the process of developing the Gateways across administrative boundaries if progress is to be made on infrastructural and other investment.

5.4 Proposals – Infrastructure

5.4.1 Transport

- Completion of the MIUs, as recently re-affirmed in *'TRANSPORT 21'*, between Dublin and Belfast, Cork, Limerick, Galway and Waterford will be key to development of the Gateways;
- There is a need for some fine-tuning of national roads investment to reflect Gateway considerations, e.g. candidates could be a link to the new M6 for Tullamore;
- Alongside the MIUs, significant investment is needed in the Gateways in both regional and local roads, beyond what could be encompassed within normal existing annual allocations;
- Gateway councils, co-operating with neighbouring counties, should prioritise key non-national road projects which contribute to the Gateway objective, especially new internal road networks designed to open up new development areas, e.g. Ardaun corridor in Galway;
- There is a need to address planning and provision at an appropriate level of local public transport in all the Gateways, possibly through public transport partnerships at local level, and involving local authority leadership and also private operators, CIE and others, and with appropriate transport planning capacity within the local authorities. Delivering upon reform of the bus licensing system is an important facilitating factor in this regard, especially in smaller Gateways where rail solutions are



not likely to be appropriate options. There is also potential synergy in some Gateways with the planned roll-out of the Rural Transport Initiative.

5.4.2 Other Infrastructure

- In water services much progress has been made in bolstering infrastructure. However, such has been the pace of growth and development that newly created capacity is being used more quickly than originally envisaged. Accordingly, this means that many plants recently completed to meet the requirements of the Urban Waste Water Directive will need to be further expanded within the period of the next NDP;
- High-quality ICT infrastructure is a necessity across the Gateways. To ensure that Gateways are up to national and international standards, issues for progress in the future include strengthening the resilience of networks and ensuring a range of alternative networks and service providers;⁸²
- In a number of other important infrastructural areas, including commercial utilities, some individual Gateways face specific capacity and quality issues. This includes, for example, electricity in Letterkenny. These need to be examined jointly by the local authority, development agencies, the relevant utility, and parent departments or regulators.

5.5 Proposals – Enterprise and Economy

- The enterprise and tourism development agencies, working with local authorities, should develop a sharp and succinct statement regarding each Gateway, highlighting key implementation challenges that will need to be delivered on in underpinning the competitiveness and dynamism of the enterprise base in the Gateways;
- There is a need for the local authorities in the Gateways to take a wider view of and role in economic development, which typically tends to focus on the role of FDI. Local authority policies with regard to fostering growth sectors such as retailing, tourism, and local services can do much to strengthen the local economy.

5.6 Proposals – Labour Force, Skills and RTDI

- In the case of the newly designated Gateways, mostly served locally by IoTs, there are particular challenges, not least that of relatively small scale. The proposed assumption by the HEA of the IoT funding responsibility is welcomed, and provides the potential for exploring new approaches to optimising the IoT's contribution to Gateway and regional development. Areas such as more joint working across IoTs and between IoTs and universities (already evident in some instances), and the development of a more collegiate approach across the IoT sector as a whole, should be actively considered;

⁸² There may be scope for some Gateways, especially newer and smaller ones, to go further in the use of new ICT technologies as a distinct competitive advantage, e.g. creating a “wireless city”.



- However, at a Gateway level, third-level institutions should formulate shared innovation strategies with other key stakeholders, building on existing strengths and outlining their respective roles within this;
- Smaller institutions in particular should prioritise the disciplines with which they will seek national and international excellence, and do so in the light of local strengths and needs, and the shared aspirations of partner agencies;
- In such efforts, the potential to include other potential RTDI assets, especially in smaller Gateways, should be explicitly considered. In a number of Gateways, for example, regional hospitals have relatively large numbers of highly skilled professionals who are generally not well incorporated into regional RTDI efforts;
- Mechanisms should be developed via HEA/EI through which there would be a strategic alliance between university and IoT centres in every Gateway, building up regional and RTDI capability and capacity for research by bolstering regional innovation capacity and competitiveness.

5.7 Proposals – Quality of Life

5.7.1 Education and Community Infrastructure

- There is a need to ensure that the provision of community and social infrastructure such as schools, playing areas, community and sports halls happens “hand in glove” with the development of major new housing areas. More effective and open collaboration between local authorities, the relevant departments and developers, as the plans and proposals for the development of such areas are being formed, would be key in this area, perhaps by setting up informal and non-statutory schools planning teams.⁸³

5.7.2 Arts and Culture

- In general, the national cultural institutions are located in Dublin. The other Gateways should become focal points for cultural investment in art galleries, museums and libraries in order to improve the national cultural infrastructure, and to enhance these locations as attractive living;
- The Department of Arts, Sport and Tourism, in conjunction with the local authorities, should develop a precise programme for each Gateway, identifying existing cultural facilities and their standards together with a development programme for facilitating the improvement of this infrastructure;
- The national cultural institutions should facilitate, as far as possible and where appropriate facilities exist, the loan of pieces from the national collections to cultural bodies in the other Gateways. The potential for development of sub-sections of national cultural institutions in other Gateways should also be examined.

⁸³ NDP/CSF Evaluation Unit, *Evaluation of Social Inclusion Co-ordination Mechanisms, Dublin: NDP/CSF Evaluation Unit www.ndp.ie/evaluation, 2003*



5.7.3 Social Inclusion in Gateways

- Social inclusion in Gateways is an important issue. Alongside social equity considerations, it also affects the image, confidence and dynamics of the Gateway;
- There appears to be a multiplicity of separate publicly-funded initiatives and agencies operating separately within the relatively small geographic territory of each Gateway, an area which is the location of much social exclusion. A strengthened co-ordination function should be established within Gateway local authorities, aimed at establishing a stronger social inclusion dimension to Gateway development, and updating on Gateway level progress and issues.

5.7.4 Other Public Services

- All relevant Government departments and their agencies should continue the ongoing process of reflecting the NSS in their high level plans and programmes, and the next NDP should include a policy framework to ensure that this will be the case in respect of future capital investment. Key areas include healthcare and education at all levels.

5.7.5 Promotion and Marketing

- Local authorities should take on a new responsibility, working together with appropriate other local partners (e.g. IDA Ireland, Fáilte Ireland, Tourism Ireland) for the overall marketing and promotion of their locations to a variety of audiences, while not cutting across the existing national functions of relevant agencies;
- Individual Government departments and agencies should give consideration to the establishment of limited “challenge funds”, by prioritisation within their existing budgetary allocations, to stimulate and support particularly innovative proposals in each Gateway.

5.8 Organisational Mechanisms and Gateways

5.8.1 Introduction

Throughout the research for this report, sources as diverse as international literature and City and County Council Managers have emphasised the importance, alongside infrastructure, of “soft” issues including marketing, innovation, culture and, above all, governance in the broadest sense. The latter includes organisational, institutional, co-ordination and leadership issues at both local and central level, and critically the interface between these levels.

Important here is the distinct nature of Ireland’s public administration system as it affects the Gateways. This distinctiveness includes:

- Absence of a strong regional political or administrative tier (which has contributed to the drive behind “regional capital” Gateways elsewhere, e.g. Barcelona and Bilbao);
- The heavy dependence on central Exchequer funding, capital and current;



- The relatively limited range of functions of Irish local authorities and the corresponding existence of many other separate public and publicly-funded agencies at local level;
- The relatively small size of most Gateway local authorities, and absence of dedicated Councils in the newly designated Gateways, (i.e. Athlone/Mullingar/Tullamore, Sligo, Dundalk, Letterkenny);
- The need to co-ordinate the development of Gateways across a number of local authority boundaries, with many of the Gateways involving more than one local authority, and with active local rivalries evident in a number.

Against this background we propose a number of inter-related actions of an organisational nature at both local and national level. In all cases these refer to the nine Gateways only; they are not wider country-wide proposals. These are designed to:

- Ensure clarity in relation to public policy towards the Gateways as cornerstones of the NSS as a whole;
- Achieve a more focused and co-ordinated whole-of-Government and public sector effort at both local and national levels, and between the two. “Co-ordinated” here relates to co-ordination and integration across Government departments, agencies and local authorities, and equally importantly within them. Internal co-ordination and “joined-up-organisations” are often lacking at both levels, and are a prerequisite for wider joined-up Government;
- Give private sector investors, who often show greater dynamism than the public sector in this context, the kind of confidence, clarity and good public service support and regulation that will persuade them to invest in Gateways;
- Ensure availability of appropriate levels of resources for Gateways, within overall existing budgetary and capital envelopes;
- Ensure the availability of appropriate skills and institutional capacity and leadership, especially in smaller and newer Gateways;
- Ensure the appropriate mix of investment in Gateways – across the areas of economic infrastructure, social infrastructure, enterprise and economic development, skills and innovation, and marketing and promotion.

5.8.2 Local Authorities and the Gateways

- The various local authorities in each Gateway need to co-operate more effectively in establishing a group to promote and lead each Gateway, harnessing existing structures such as the CDB or cross-authority implementation teams, backed with the resources that are necessary to act as the driver and contact point for NSS implementation in each Gateway;



- The structures for each Gateway could take the form of a small focused group of people from key local and public agencies⁸⁴, Strategic Policy Committees, the private sector and the local community, to be constituted as a “Gateway Implementation Group” and aimed at providing support, advice, dynamism and local co-ordination. Where appropriate, this Group could be a sub-committee of the relevant CDB. This Group should have a DoEHLG representation also. Its focus would be on Gateway-related “big-ticket” items only, not on more routine public service delivery. If necessary it should be established on a cross-authority basis. Care should also be taken to ensure adequate links with mechanisms established at Regional level to oversee implementation of the RPGs. Existing local authority links with this regional process should be able to ensure this interface is effective;
- To service the Gateway Implementation Groups, local authorities need to consider appointing a senior and suitably skilled and motivated person to a position as a dedicated “Gateway Co-ordinator” and reporting ultimately to the City and County Manager or Managers as appropriate;
- The Gateway Implementation Groups should, by September 2006, develop a five-year rolling 10-point implementation framework based on existing plans (RPGs, Council Development Plans, CDB Strategies, agency plans, LUTS/PLUTS plans). It will be important that this framework addresses organisational, co-ordination and “softer” issues, not only infrastructure requirements;
- Local authorities should also examine the skills and competencies of existing staff that are central to Gateway development issues to ensure that the authority is adequately equipped in the areas of: transport service planning; property development; project finance; economic development; marketing. The individual development agencies are a potential source of such expertise, possibly via temporary secondments of staff to Gateway local authorities. Therefore, secondments from other agencies, training, external recruitment, or use of externally contracted expertise are all options in this regard;
- Cross-authority/boundary (city and county) physical planning teams should be established within existing staff resources in most Gateways to address key issues such as land use, planning, transport etc. These should be staffed on a collaborative basis;
- Significant funds are accruing to some local authorities under the Development Contribution Scheme system introduced as part of the Planning and Development Act, 2000. These funds are made up of development levies charged on new developments. Local authorities should ensure that such levies are harnessed as fully as possible and that improvements in local services and infrastructure paid for by such levies are branded (as in the case of NDP investment) to demonstrate to the local population the benefits of having such schemes in place. Taking account of local economic circumstances, part of these funds should also contribute in the Gateway to the proposals in this and other sections of the present chapter.

5.8.3 Central Government and the Gateways

- The NDP 2007-13 represents a key opportunity for Government to reaffirm and elaborate on its policy with regard to the role of the Gateways in achieving more balanced regional development, a role first formally introduced in the current NDP;

⁸⁴ Including, but not limited to, IDA Ireland, EI, Regional Tourism Authorities, Department of Education and Science, HSE, third-level institutions, local enterprise, and community representatives.



- Consideration needs to be given to the issues involved in co-ordinating the development of the Gateways across a number of administrative boundaries, including use of existing DoEHLG powers and finance to encourage greater cross-authority planning and service delivery as well as mechanisms to revise the boundaries of local authorities;
- A network of Gateway Co-ordinators should be established to share experiences and innovations in terms of their development and implementation across the Gateways;
- The Inter-departmental NSS Implementation Team should be asked to monitor progress in the Gateways and the network of the Gateway Co-ordinators should interact regularly with the NSS Implementation Committee and support it in this task;
- There is also a need at central level for much more proactive and continuous explanation, briefing, etc. re: the NSS within key departments and agencies, e.g. for new staff;
- As already reflected in the sectoral recommendations, a number of national policy areas of importance for Gateways need to be more clearly articulated as they relate to the Gateways:
 - local, i.e. non-national road investment prioritisation;
 - local public transport, especially bus transport;
 - regional aspects of RTDI;
 - arts, sports and heritage facilities;
 - the interface between regional development and market regulation of utilities.

5.8.4 Central Government, Local Authorities and the Gateways

Linkage and interaction between Government departments and local authorities should be strengthened by:

- DoEHLG membership of the Gateway-level Implementation Groups in the Gateways;
- Establishment of a designated network of contacts in all key departments and agencies for the Gateway Co-ordinators;
- Establishment of a network of Gateway Co-ordinators by the DoEHLG to facilitate knowledge transfer, share ideas and develop best practice approaches to the development and promotion of the Gateways.

A summary of the main structures outlined here is shown in Figure 5.1.



FIGURE 5.1: MANAGEMENT/ADMINISTRATIVE MECHANISMS: SUMMARY

	Description
<p>Gateway Level: <i>Gateway Implementation Group</i>¹</p> <p><i>Gateway Co-ordinator</i>²</p> <p><i>Co-ordinator Network</i></p>	<p>A committee of key local agencies and actors (plus a DoEHLG representative) working with the Gateway Co-ordinator²</p> <p>A senior full-time official within the local authority, reporting to the City/County Manager</p> <p>A network of the nine individual Gateway Co-ordinators (see above)</p>
<p>National Level: <i>Contact Network</i></p> <p><i>Inter-departmental NSS Implementation Team</i></p>	<p>Designated contact points for Gateways (esp. Gateway Co-ordinators) in each key central department, agency (one in each organisation for all Gateways)</p> <p>The existing Inter-departmental NSS Implementation Team to lead and co-ordinate action across departments and agencies.</p>
<p>¹As necessary on a cross-authority basis. ²Appropriate links with mechanisms established at regional level to oversee RPG implementation should be ensured.</p>	

5.9 Gateways in the 2007-13 NDP Period

5.9.1 Context

The Gateway concept originated in the current (2000-06) NDP. Clearly, however, there was a sequencing issue in fully operationalising the concept, as the NDP was finalised well in advance of the NSS.

Heading into the post-2006 period, the sequencing is now correct, and the NSS and its proposals regarding Gateways are available as a timely input. The status of the NSS and the Gateways has also been reaffirmed in the Department of Finance’s appraisal guidelines for capital investment projects, and in the recently launched ‘*TRANSPORT 21*’ 10-year strategy for transport investment.

In the context of the NDP it is also important to emphasise that progressing the Gateways concept is not about more funds, beyond planned capital envelopes, it is about establishing priorities within existing and planned capital envelopes. Gateways are not about how much is spent, but rather where it is spent. Consequently, the Gateways are about maximising effectiveness, efficiency and value-for-money. They are a key tool – arguably the only real tool available – by which more balanced development within Ireland can be realistically achieved.



Through concentration and critical mass, they also potentially reduce the unit (per capita) cost of providing key but costly infrastructure and services in such areas as health, public transport, water and waste, children and elder care.

In this context it is also important to re-emphasise the point, made earlier in the report, that investment in the Gateways is not only about Exchequer investment. Other key sources will include local authority own resources (including development levies), PPP and purely private sector investment. This is one of the reasons we have also stressed the need for local authorities in Gateways to have access to expertise in such areas as project finance and property development. As stated earlier, we think some of this expertise could be accessed from within the enterprise development agencies.

5.9.2 *Proposals*

Our proposals regarding the role of the Gateways in the new NDP are:

- (a) The NDP should contain a reaffirmation of the role of Gateways as the drivers of growth in their regional economies and in the national economy;
- (b) There should be an explicit commitment to meeting the realistic investment needs of the Gateways. Whether that is achieved by having an identifiable Gateway-specific investment package, or by prioritising resources within the conventional “horizontal” or sectoral packages, is obviously dependent on the overall structure of the NDP;
- (c) However achieved, there should be clear tailored investment packages for the Gateways, with similar themes but different emphases, depending on specific local requirements;
- (d) Government departments and agencies should give consideration to setting up “challenge fund” type initiatives within their capital allocations. Such prioritisation of resources might be used to incentivise and bring forward innovative Gateway implementation activities. The approach outlined above would be facilitated by prioritisation within existing budgetary and capital allocations. Such a measure would cover capital and in some cases current funding for projects specifically designed to improve the urban infrastructure, regeneration and development of the Gateways. This might include support for strategy preparation, innovative local leadership and co-ordination structures, and marketing and promotion (e.g. new events) for non R&D enterprise innovation, iconic sculptures, and capacity building. These funds could be distributed on a competitive basis among the nine Gateways⁸⁵. In the past, initiatives such as the Metropolitan Area Networks (MANs) and the Serviced Land Initiative on housing supply have yielded substantial infrastructure improvements in many urban locations, including some Gateways, driven by local authority drawdown of national funding allocations;
- (e) A series of targets should be established for each Gateway under the NDP, reflecting the role of the Gateway concept and the particular circumstances of each Gateway. Example targets might include the reduction of social inclusion black spots, reduction in long-distance commuting in the

⁸⁵ A model here is the “Cities Growth Fund” in Scotland, see <http://www.scotland.gov.uk>.



region, levels of national or international awareness, and change in the enterprise and employment base in the Gateways to reflect a greater presence of higher value functions and activities.

5.9.3 National Strategic Reference Framework

The proposals in Section 5.9.2 are also relevant to the National Strategic Reference Framework (NSRF)2007-13 under which EU Structural Funds for the next period will be programmed⁸⁶. The type of proposals, including those of “challenge funds” for Gateway development, should be considered by the relevant bodies including the Department of Finance and the Southern and Eastern, and Border, Midland and Western Regional Assemblies – the latter in the context of the new EU co-financed Regional Operational Programmes which will be formulated during 2006.

⁸⁶ For a summary of EU post-2006 priorities see Fitzpatrick Associates, *Community Support Framework 2000-2006 Update Evaluation*, NDP/CSF Evaluation Unit, 2005.



Annex

Factors in Successful Gateway Development – International Research



Factors in Successful Gateway Development – International Research*

1. What International Research Shows

The vital role of cities and city-regions in promoting economic development has encouraged an extensive volume of research on the factors that contribute to place and regional competitiveness. The focus of most of this literature is on large cities, typically national or regional capitals. Nevertheless, the lessons from some of this research has relevance for developing the Gateways in Ireland.

“Place” or regional competitiveness is a complex and elusive concept. A special issue of the journal *Regional Studies* in December 2004 argues that “place competitiveness” is more complex than competitiveness based on a limited number of factors of comparative advantage at the level of firms.

Following Storper (1997)** the concept of place competitiveness has been defined as “the ability of an urban economy to attract and maintain firms with stable or rising market shares in an activity while maintaining or increasing standards of living for those who participate in it”. In a broader assessment of regional competitiveness, Cambridge economists and economic geographers have proposed that increasing standards of living and improving quality of life factors are the primary target outcomes for regional development strategies, and that these are achieved through improvements in two key areas of revealed competitiveness, namely labour productivity and the employment rate.

Several underlying factors are then identified as the basis for regional competitiveness, including:

- infrastructure capital: transport, communications, utilities, housing etc;
- productive capital: SMEs and FDI in targeted sectors;
- human capital: skills and participation rates in the labour force;
- knowledge capital: R&D and innovation capacity, knowledge transfer;
- social/institutional capital: extent of local autonomy in respect of policy implementation, capacity to engage key stakeholders through formal and informal arrangements;
- cultural capital: both the historical legacy of cultural artefacts and also individual, corporate and social behavioural patterns that promote or inhibit collaboration, creativity and risk taking.

The findings of the most thorough assessment to date of competitive European cities are presented in the special report to the UK Office of the Deputy Prime Minister (Parkinson et al 2004). Following an analysis of key indicators, interviews with senior policy makers, and drawing on case studies related to 15 European cities (Helsinki, Stockholm, Copenhagen, Amsterdam, Rotterdam, Lille, Toulouse, Lyon, Frankfurt, Dortmund, Stuttgart, Munich, Milan, Turin and Barcelona), the report concluded that there is a substantial amount of international agreement among researchers and policy makers concerning the factors that contribute to competitiveness. A small number of primary drivers were identified as being of critical importance. These include:

*This Annex was prepared by Prof. Jim Walsh, ICLRD, Maynooth.

**A list of references is given at the end.



- innovation in firms and organisations (knowledge capital);
- availability of skilled workforce (human capital);
- connectivity, internal and external (infrastructure capital);
- economic diversity (productive capital);
- strategic decision-making capacity (social/institutional and cultural capital).

These correspond closely with the basis for regional competitiveness identified by the Cambridge researchers. In addition to the list of primary drivers some others were also identified (though their level of importance was more ambiguous). These include:

- An inclusive and diverse society;
- Exhibition facilities;
- A distinctive core;
- Cultural facilities;
- Quality housing;
- Fiscal incentives for cities;
- National policies;
- An image for environmental excellence and responsibility;
- An image for effective governance and efficient services.

The first of these, an inclusive and diverse society, has been identified as a very powerful indicator in studies of high-growth cities in the US. Research by Florida and Gates (2003) has confirmed that both tolerance and diversity clearly matter to high technology concentration and growth. Their basic argument is that places with tolerant and diverse societies are more likely to attract and retain talented and creative individuals, which will in turn foster development of new innovation-led companies.

A further international review of literature on regional development, from the perspective of an Australian regional scientist (Blakely 2004), also notes the importance of social cohesion, though from a different position. He argues that deep divisions in a community's social structure can impede economic performance. He concludes that the social tensions associated with rapid economic and social change present significant challenges that need to be addressed, since global capital seeks not only favourable taxation locations but also social diversity and stability.

Blakely's overview, drawing on experience that extends beyond Europe, is broadly consistent with the findings of the European researchers noted above. His list of key regional economic development forces includes:

- (1) **Economic diversity:** agglomerations of reinforcing firms from different sectors (manufacturing and services) that collaborate locally as well as competing for global market share. An important feature is engagement in international business networks, through which risks to localised economic shocks can be reduced. The transformation of Dublin's economy since the early 1990s fits this model;



- (2) **Population multiculturalism:** building on insights from Florida (see above), a high level of significance is attached to the benefits that may accrue from immigration of people from diverse cultural backgrounds. Cities and towns with universities may be particularly attractive locations for such immigrants, emphasising the multi-dimensional role of Higher Education Institutes. It is recognised that this factor is likely to be of greatest importance in large cities that fulfil other criteria for success;
- (3) **Creative/skilled workforce:** the vital role of human capital in national and regional development is well known. It is set to become of even greater importance in the context of the transition to a more knowledge-based economy and society. The key requirement at the city/regional level is a sufficient supply of third-level graduates across a broad range of disciplines;
- (4) **Connectivity:** the key concerns are the availability of very good transport and communication infrastructures, and in the case of air and sea ports a schedule of regular services to key destinations. Timeliness and frequency of connections, especially from regional airports, is very important in order to facilitate face-to-face communication that cannot be replaced by technology;
- (5) **Governance, strategic planning and other related capacities:** this relates essentially to the capacity to mobilise public and private actors for a common agenda. The key issues are capacity to: formulate and communicate collaborative visions, provide decisive leadership capable of pioneering new sources of competitive advantage and transforming potential crisis situations into opportunities for constructive outcomes; build trust and energise local/regional partnerships around “win-win” type strategies; bring forward bold proposals that will challenge but also win support from other agents, and negotiate successful outcomes with the political and higher administrative power regimes.

Professor Soterauta (2003) from the Research Unit for Urban and Regional Development Studies at the University of Tampere in Finland places considerable emphasis on the significance of strategic and other related capacities. These include networking capacity, absorptive capacity, interpretative capacity and excitement capacity. Networking capacity refers to capabilities to forge trust and mutual dependency based on horizontal co-operation between organizations and individuals. Absorptive capacity refers to the ability to identify, assimilate and exploit new knowledge from outside the organisation and also the ability to transform vision and strategy into actions. Interpretative capacity relates to the ability to understand and build upon differences and similarities in agent’s values, goals and interpretations of desirable outcomes in order to construct a collective strategic consciousness. He claims that, in the 1990s, there was a convergence of views among key actors in Finland and also in Northern Denmark around the goals of urban development, and that the construction of a collective strategic consciousness was a key element in ensuring strategic focus and in creating and maintaining the density and integration of development networks. Finally, excitement capacity refers to the ability to capitalise on the creative tension between the inspirations and goals of key individuals and the dominant or more orthodox thought patterns. The creative tension may result in unprecedented original processes and action models that enhance the likelihood of success in implementing an overall strategy;

- (6) **Innovation/entrepreneurship:** innovative firms and small agile entrepreneurial organisations are a vital component of knowledge-based economies. The milieu in which these firms and related support



structures (such as venture capital organisations) tend to operate in is very important. City regions are more likely to be able to provide the supportive milieu as locations of creativity, productivity and innovation-enhancing effects of dense and multi-faceted urban structures that are simultaneously embedded in global networks. Simmie (2001) convincingly argues that innovative cities enable local players to respond to complex global opportunities. In order to do this, cities require “organisational responses that combine: power of corporate capital with the opportunism of small business; manufacturing technology and service expertise; entrepreneurial forms of freedom with effective public regulation and support; new ideas encouraged by a stable established institution and physical infrastructure; and a capacity for trial and error through support for risk taking”;

- (7) **Quality of housing/community:** this encompasses, among other factors, the availability of high-quality housing at reasonable prices in attractive physical settings and desirable social surroundings. Access to a wide range of higher order services (segments of retailing, higher level education, specialist medical and health care, and recreation, leisure and cultural facilities) are important influences on individual and corporate locational choices.

2. Instruments for Implementing Polycentric Development Policies

The final report of the ESPON Research Project on polycentricity identifies three categories of instruments that can be used for implementing polycentric strategies such as the NSS. These include:

- spatial implementation instruments;
- non-spatial instruments;
- strategic planning instruments.

Spatial implementation instruments aim to generate a direct impact on the spatial and/or economic development of a specified area. The instruments usually take the form of a regulation (e.g. permissible direct aid levels, permissible land uses, environmental restrictions, quality assurance, social responsibilities, location-based taxes), investment programmes (e.g. infrastructure, education, health) or a budget. Other forms of spatial implementation instruments include relocation of administrative agencies, territorial action plans and monitoring systems. As the responsibility for many of these instruments frequently rests with a single Government department or agency, there is a strong need for co-ordination and integrated delivery systems.

The most well-known example of **non-spatial instruments** is administrative reform, which is mostly focused on establishing a strong intermediary level between the local and the national scales. Workable initiatives in this area have the potential to stimulate enhanced levels of institutional capacity, though in practice this is rarely achieved unless there is already a strong political and administrative commitment to devolution.

Strategic planning instruments are the most relevant for promoting polycentric development. Spatial visions and adequately resourced regional economic development strategies can play major roles in



relation to implementing polycentric development strategies. Regional planning guidelines *per se* are of limited value unless they are accompanied by a spatial conceptualisation (in the form of a narrative and/or maps of the territory). The ESPON project team noted that Ireland's spatial strategy is underpinned by a strong spatial conceptualisation, which makes it comparable to similar strategies for Denmark, France, Germany, the Netherlands, some UK regions and Poland. A comprehensive spatial conceptualisation needs to be supported by a programme of ongoing theoretically informed empirical research.

As most countries are at a relatively early stage in the implementation of polycentric strategies it is difficult to identify the instruments that work best. The evidence so far suggests that progress is being made in embedding polycentricity in the broader national policy frameworks of countries with spatial strategies. However, there is also general agreement that the shift to a new paradigm in spatial planning and achieving new forms of outputs will require a sustained effort over a longer period.

3. Some General Implications for Development of Gateways

The international experience suggests that many of the ingredients for successful implementation of a Gateway strategy have already been recognised in Ireland. However, there is a need for a more focused and dynamic approach in many areas. At the outset it is worth noting that the National Spatial Strategy and the process that underpinned it are recognised as models of good practice throughout Europe. That process has been taken further through the completion of the Regional Planning Guidelines. In parallel, structures have been put in place to reform Local Government (e.g. establishment of City and County Development Boards and preparation of and county strategies). Beyond the spheres of governance and spatial planning, there have been developments in policy in relation to enterprise, health, transport, roll-out of broadband infrastructure, and higher education. In all areas there is recognition of the underlying national economic and social objectives in relation to competitiveness, cohesion and the role of the NSS, especially the Gateways. The overarching backdrop for much of this shift is the Lisbon Agenda concerning the transition to knowledge-based economies. There are nevertheless several challenges ahead.

Viewed from the local rather than international perspective, the greatest of these may be operationalising and generally putting into practice otherwise high-quality strategies, plans and approaches. In many ways we have the plans, we have the general intention to implement them, we have (in principle) the mechanisms and the money, but somehow the package may not be coming together in a clear and focused way.

Despite the very considerable progress made in economic development over the past decade, there are still several crucial areas where Ireland is lagging behind competitor regions in Europe. Here, comment is restricted to the areas relevant to the advancement of the Gateways against their international context.



Physical Infrastructure: Considerable progress is being made under the current National Development Plan investment programme, which must be completed as soon as possible. In future, special attention will be required to improve accessibility around the Gateways and the remaining inter-Gateway routes. Investment in selected stretches of county roads, which take account of trends in settlement, will be required in order to improve linkages between rural areas and the Gateways. Investments aimed at strengthening international competitive advantage should be targeted at the larger Gateways, especially Cork, Limerick and Galway, with a long-term vision towards an integrated polycentric development axis. In the first instance, the roles of the other Gateways are more to strengthen regional economies and therefore contribute to achieving more balanced development throughout Ireland. Improved connections between local centres are required, especially in the Midland Region and the South-East Region, in order to build up a critical mass of expertise and also to increase the levels of potential demand for local private and public service providers so that a more sophisticated range can be offered.

In addition to investments in transport infrastructure, other bottlenecks affecting the Gateways need to be addressed, which may include water and sewerage, energy supplies, telecoms and waste management facilities.

Knowledge Capital: Considerable strides have been made in R&D investment over recent years as part of the Government commitment to achieving the objectives of the Lisbon Agenda. Nevertheless, the overall level of investment from both public and private sources in R&D in Ireland remains comparatively low, and there is a very significant level of catch-up required. The size, focus and distribution of future rounds of investments will be crucial in shaping Ireland's participation in the knowledge-based economy of Europe in the decades ahead. The Gateways have a vital role as locations where much of the research will be conducted and/or as locations through which the outcomes from research can be transferred to the broader economy and society. The two major axes of development in the future, the Greater Dublin Area and Cork-Limerick-Galway, are well endowed with universities. More effort will be required to strengthen the linkages between the research community and the business sector in ways that are mutually beneficial, however. Current levels of interaction are low by comparison with some other countries which in part reflects the nature of Ireland's industrial model (e.g. the extent of the reliance on FDI, as much of the R&D activities of these companies are conducted outside Ireland) and also traditions within the universities. In order to overcome these barriers, new interventions will be required.

In a country the size of Ireland, in terms of geographical extent and also the density of researchers, it is not appropriate to think of dedicated regional knowledge transfer programmes. Rather, the focus should be on strengthening the level of expertise at locations with proven track records and supporting knowledge transfer from those research centres to other parts of the country. The Institutes of Technology, working in collaboration with the universities, could have a vital role in this regard.

Cultural Diversity/Creativity/Inclusiveness: Several international studies have noted the potential benefits that can be derived from policies that support immigration. Relatively large scale immigration, by Irish standards, is a very recent phenomenon. The indications are that a new demographic phase has



been entered, and that it will continue. The empirical evidence suggests that immigrants who do not have previous Irish family connections are most likely to settle in or around the largest urban centres. As noted already, the contributions of immigrant communities have been particularly noteworthy in city regions characterised by tolerance, openness and a disposition towards inclusiveness. The university towns may have a special role here in relation to attracting and retaining highly qualified immigrants.

Social exclusion presents a different set of problems. While there have been considerable efforts to tackle the extent and underlying causes of social exclusion, there are significant legacies in some areas that affect the overall perception of the city or city region. While such perceptions may not reflect the reality of daily living for the majority of people in such cities, they can impinge on private and public decisions concerning moves to those places. Concerted efforts are required to tackle the root causes of social exclusion at the local level, and these need to be accompanied by vigorous rejuvenation programmes and initiatives to overcome current perceptions.

Institutional Capacity Building: The issue of effective governance structures is a recurring one throughout the international literature. The major constraints in Ireland are weak mechanisms for policy co-ordination at the central level, extremely weak regional structures, and a local authority system that has relatively limited functions compared to many European countries (and which has very limited discretionary funding generated from local sources). Recent reforms, such as the establishment of the City and County Development Boards, contain the potential for more integrated strategic planning at city/county level. However, since the completion of the 10-year development strategies by each Board, progress has been slow, leading in some instances to potential disillusionment with the initiative.



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