



Westpark Shannon Limited Submission to the National Planning Framework – Ireland 2040

March 2017

National Planning Framework – Ireland 2040
A submission from Westpark Shannon

This Time - the Need for Real and Effective Change

A view from Westpark Shannon - Ireland's Premier International Business Campus and the home to 50 internationally trading companies, employing close to 2,000 people.



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A submission from

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Westpark Shannon is...



Westpark Shannon is working on its next phase, to expand its existing community of 2,000 business professionals to over 5,000. A REAL Spatial and Regional Strategy would help us accelerate our plans.

The Challenge – Real and Effective Change

“Ireland’s attempts at spatial development have failed abysmally. Not alone have we not made progress, the statistical indicators say we have regressed. This time, failure isn’t an option!”

Ireland 2040

This Time – the Need for REAL and Effective Change

Westpark Shannon Limited welcomes the opportunity to make a submission to Government in relation to the National Planning Framework - Ireland 2040.

At Westpark, we agree with the analysis in the framework consultative document which states that, over the course of two generations, Ireland's society and economy have been transformed. We have become a more educated, outward looking, dynamic, technologically focused and diverse country.

This positions us well for the future.

The Ireland 2040 consultation document also highlights a wide range of issues, future challenges, and choices. One of the recurring points is that 'business as usual' is not the way forward for Ireland as "It has led to overdevelopment in some places and decline in others". We fully agree. In fact, it is an understatement because of the scale and the extent of the issue, and it is the primary reason we are making this submission.

The Abysmal Failure of our Spatial Development Strategies

Ireland's spatial and regional policies (or the lack of them) over several decades have largely contributed to the different rates of growth or decline. Regions are now experiencing. The need to tackle the issue has been recognised since the 1960s, and there have been several 'strategies' and 'initiatives' rolled out by various governments to address it, from the time of the Buchanan Report (1969) through to the National Spatial Strategy (2002), the controversial decentralisation programme (2003), and even an Atlantic Gateways strategy within the framework of the NSS (2006).

They have all failed abysmally. Some never had the possibility of succeeding because they were ill-considered and they presented as politically motivated. Others tried to encompass too much and therefore lacked a sharp focus; or they were not 'driven' initiatives and appear to have been allowed to fail.

The result is that, not alone have we made no progress in terms of achieving more balanced growth throughout Ireland, we have actually regressed significantly in the last decade. The consequences of this are very well stated in the framework consultative document itself and are repeated in the panel opposite.

Because of Ireland's failure to effectively address the issue over almost five decades, the challenge is even greater now. 'Business as Usual' isn't an option, nor is yet another failed strategy. Ireland urgently needs both a growth strategy and a 'growth absorption' strategy and the National Planning Framework is critical in this context. In addition, actions to address the issue should start NOW - we are losing time.



Extract from
the 2040 NPF
consultative
document:

'Business as Usual' is not desirable for a variety of reasons:

- It has led to overdevelopment in some places and decline in others. This has meant that services and facilities may be rapidly required in many different areas, while may be underutilised elsewhere. This makes it costly and difficult to plan for future needs;
- It has impacted on the efficient and timely provision of a range of services and facilities related to people's health and well-being;
- It has resulted in people travelling longer distances, often by car, which has contributed to car dependence and traffic congestion as well as wasteful time and energy spent commuting;
- It has made it difficult to provide viable, i.e. frequent, reliable, cost efficient and cost effective public transport in most places outside urban Dublin;
- It has not led to balanced rural or urban growth outcomes, especially outside the 'hinterland' areas surrounding the largest cities and towns;
- It has affected social cohesion and in some locations reinforced social disadvantage;
- It has affected the vitality, fabric and character of the established parts of many of our towns and cities, whereby commercial activity has relocated to edge locations in some cases or has withdrawn completely in others;
- It has led to the incremental loss of agricultural land, put pressure on water resources and on environmentally sensitive areas and contributed to increasing carbon emissions.

Re-balancing Ireland - The Scale of the Challenge

The Irish Census 2016 confirms a 135-year uninterrupted trend... the continuous population share shift to the Dublin/Leinster area, which is to the detriment of Ireland as a whole.

Every single census since 1881 has seen a population share shift to the Dublin/Leinster Region, and it now accounts for 55% of the population of the Republic of Ireland.

The shift is largely driven by the strong growth of Dublin and a widening commuter belt into adjoining counties.

While there are also population growth and decline issues within each Region, this high level view brings the major challenge into sharp focus.

The uninterrupted, 135-year trend tells us that, without a strategy to address the issue, the over-concentration will become even more marked in the future.

The choice for Ireland now is whether to allow the over-concentration to become even greater - with all its negative consequences (this only requires

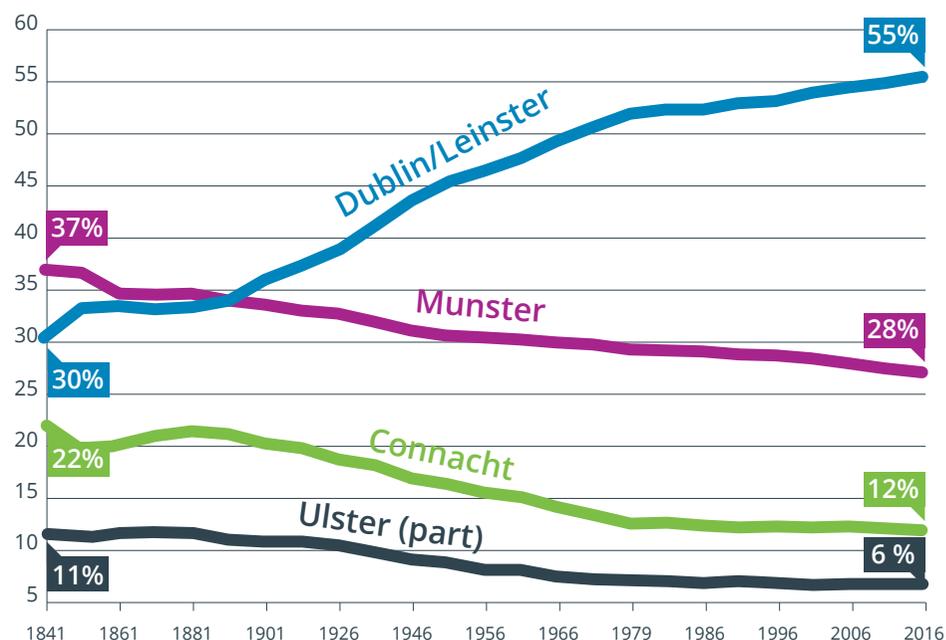
continuing inaction) or to look at a MAJOR growth and growth absorption strategy for Ireland that sees all of Ireland benefit and, importantly, taps into the unrealised potential of the Regions to bring about more balanced growth.

The Westpark Shannon Business campus is already home to some of the world's best and brightest globally-trading companies, employing close to 2,000 people. If certain strategies and initiatives OF SCALE and FOCUS are implemented, we see huge opportunity and potential to attract further investment to Westpark and the Regions of Ireland.

"The population chart reflects Ireland's abysmal failure at spatial planning."

Ireland's Population Share by Region

Changes 1841 - 2016 (%)



The Impact of Over-concentration in Ireland

For the Greater DUBLIN area it means:

- Increasing Population Share in Dublin/Leinster (now at 55% of overall population).
- Increasing Concentration of Industry and Employment.
- Increasing Concentration of Air Access (now 84% via Dublin).
- Increasing Concentration of Overseas Visitor Spend.
- Increasing Concentration of Resources / Services.
- Increasing Concentration of Infrastructural Investment.
- Increased Congestion and the Costs of Alleviating it.
- Negative Environmental Impact (an extending commuter belt, increased carbon emissions).
- Increased Travel Distances and Times (car-dependent sprawl, decreased productivity and leisure time).
- Increased Cost of Housing and Housing Scarcity (requiring people to live further from their place of work with negative social impact).
- Scarcity of resources e.g. water.
- Potential Reputational Damage to Ireland associated with over-concentration.
- Increasing Dublin-Centric Political and Business Focus and Influence.
- A largely self-perpetuating growth spiral - people drawn, often from the rest of Ireland, by employment and business opportunities, spending more and feeding the growth.

For the West and Rest of Ireland

- Over-concentration does cause downsides for the rest of Ireland. However, the Western Regions continue to provide exceptional opportunities for investment, for living, learning, lifestyle and work - in an uncongested environment. Places like Westpark Shannon, for instance, continue to attract smart globally-trading businesses because of a wide range of advantages the business campus offers. This could all be accelerated and scaled, in a way that would be transformational for Ireland, if a REAL spatial and regional development strategy was implemented.



Major Initiatives Required

“The scale of the challenge requires imaginative initiatives of scale and significance... and effective, accountable, implementation. Nothing small will change a 135-year trend.”

Create a 3-City 'Atlantic Economic Zone' - A Powerful Driver of Scale and Significance

The Ireland 2040 consultative document is pointing toward the development of cities as one key driver of balanced growth.

Westpark Shannon agrees. However, we believe Ireland is not going to achieve its objective of balancing growth without an even higher-level vision and some strategic initiatives.

We recommend that, as one major initiative, Ireland 'connects' and develops the three Atlantic University Cities of Cork, Limerick/Shannon and Galway within a special economic and investment zone, and introduces a range of development initiatives to support the zone.

Importantly, we recommend they are promoted, for investment purposes, under an 'Atlantic Economic Zone' brand.

Overall targets, sub-targets and key indicators should be set to measure progress. Responsibility for these targets should be assigned to specific and appropriate agencies.

The ambition should be that the zone is recognised as a centre of excellence for certain sectoral activities, with the

particular strengths of each city recognised and built upon. The branding of the zone is important and will facilitate more effective international marketing for investment purposes. In time, such branding may help it become as well-known for its sectors as 'Silicon Valley' is for high-tech.

Connecting the three cities (including infrastructural development and partnership initiatives), and supporting their development drive, won't just benefit the three cities, but will have a major impact on the wider zone.

It will also help Ireland achieve its growth absorption objectives because of the scale and significance of the project.

What about other cities and towns?

Westpark Shannon recommends The 3-City 'Atlantic Economic Zone' because of its scale, significance and singular FOCUS. Undoubtedly, there would and should be other sectoral and geographic initiatives.



The 3-City Atlantic Economic Zone would be a prime investment, talent and lifestyle location, and a counterpoint to Dublin

Cork, Limerick/Shannon and Galway already offer advantages to locating companies. However, connecting them and actively marketing the zone as an investment location would create a powerful counterpoint to Dublin. Here is some of what they already offer:-

Welcoming and Pro-Business: The 3-City Zone is a vibrant home to close to 350 overseas companies in ICT, life sciences, financial services, engineering, publishing, software, food, marine, energy, aviation, and logistics. Famous names include Apple, Dell, EMC, Hewlett Packard, IBM, Intel, CISCO, Medtronic, GECAS, Johnson & Johnson, Regeneron, Northern Trust, Cook Medical, Boston Scientific, Pfizer, Novartis, AerCap, Pepper and DHL.

Talent Flow: There are three universities and four technological colleges within the 3-city Zone. These engage with companies and provide industry-ready graduates. Businesses can also call upon proven talent within the Region and from throughout Ireland and Europe.

Research and Innovation: The diverse range of sectors in the Region is supported by an equally diverse spread of research and innovation centres, mostly linked to the universities and technological colleges. Too numerous to list, they include photonics, micro/ nanoelectronics, data analytics, advanced materials, medical engineering, micro-scale mechanical engineering, software engineering, chemical technologies for biomass and bio fuels, marine science and renewable energy.

Road and Rail Connections: There are good road and rail connections to Dublin and improving road connections between the 3 cities. However, there is a need for a motorway to connect Cork and Limerick to dramatically reduce the travel times between the cities.

Airports and Seaports: Cork Airport serves UK and Europe; while Shannon Airport provides international connections to the US, UK and Europe. The Shannon Estuary is one of Europe's deepest natural water courses and, at Foynes, has the

busiest bulk port in Ireland. Cork also has a Tier 1 Port, Ireland's second busiest port, and is home to Maritime & Energy Research and Resource Centres. Galway Harbour has ambitious development plans.

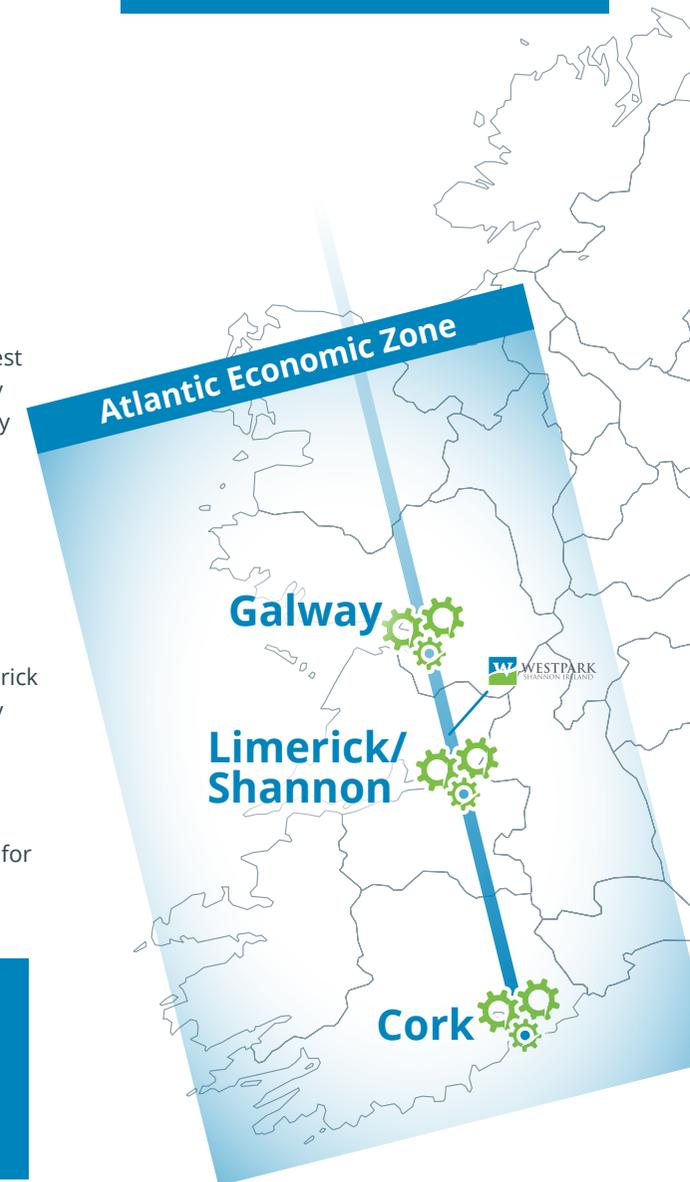
Telecommunications: We have one of the most advanced and competitive telecommunications infrastructures in Europe.

Cities, Towns and Villages: Cork, Limerick and Galway are thriving cities with busy towns and idyllic villages in easy reach.

Lifestyle: The cities and wider region, including a dramatic coastline, offers a perfect work and lifestyle environment for individuals and families.

WESTPARK SHANNON

Westpark Shannon is one of the key investment locations within the zone



Grow Sectoral Clusters and Centres of Excellence in the 3-City ‘Atlantic Economic Zone’

Westpark Shannon supports the concept of the clustering of industry and the creation of centres of excellence across the three ‘Atlantic’ Cities of Cork, Limerick/Shannon and Galway.

Each City already has strong sectoral clusters, and the creation and promotion of a 3-City “Atlantic Economic Zone” would help to build upon this.

Westpark Shannon, for instance, is already home to a strong Aviation cluster which includes the world’s top two aircraft leasing companies (GECAS and AerCap). Shannon, together with Limerick, is also strong in Internationally Traded Services. Galway is an international centre of excellence for manufacturing and research in the Medical and Biomedical sectors, and it is now one of the two largest medical devices industry clusters in the world. Cork is particularly strong across a number of sectors, including Life Sciences, Technology and Global Business Services.

Clustering across 3-Cities could facilitate the further development of collaborative links and collaboration between the zone’s

industry and its educational and research establishments. It would stimulate networking, attract skilled and flexible talent and encourage and support innovation.

The approach should also support growing indigenous business – particularly high potential start-ups and globally-trading businesses. Clustering would confer the 3 Cities and the wider Atlantic zone with a competitive advantage.

MARKETING THE ATLANTIC ECONOMIC ZONE FOR INVESTMENT

A 3-City ‘Atlantic Economic Zone’, and the sectoral clusters within it, would also facilitate a focused and DRIVEN marketing strategy to effectively market the zone, particularly for foreign direct investment, and as a preferred location to start and grow indigenous globally-trading businesses.

We should have a special focus on building internationally competitive clusters within the Atlantic Economic Zone.

A Powerful Atlantic Zone for

- ✓ Information and Communication Technologies
- ✓ Life Sciences
- ✓ Financial Services
- ✓ Aviation
- ✓ Logistics
- ✓ Software
- ✓ Hardware
- ✓ Engineering
- ✓ Publishing
- ✓ Big Data
- ✓ Agri-Foods / Horticulture
- ✓ Maritime
- ✓ Renewable Energy

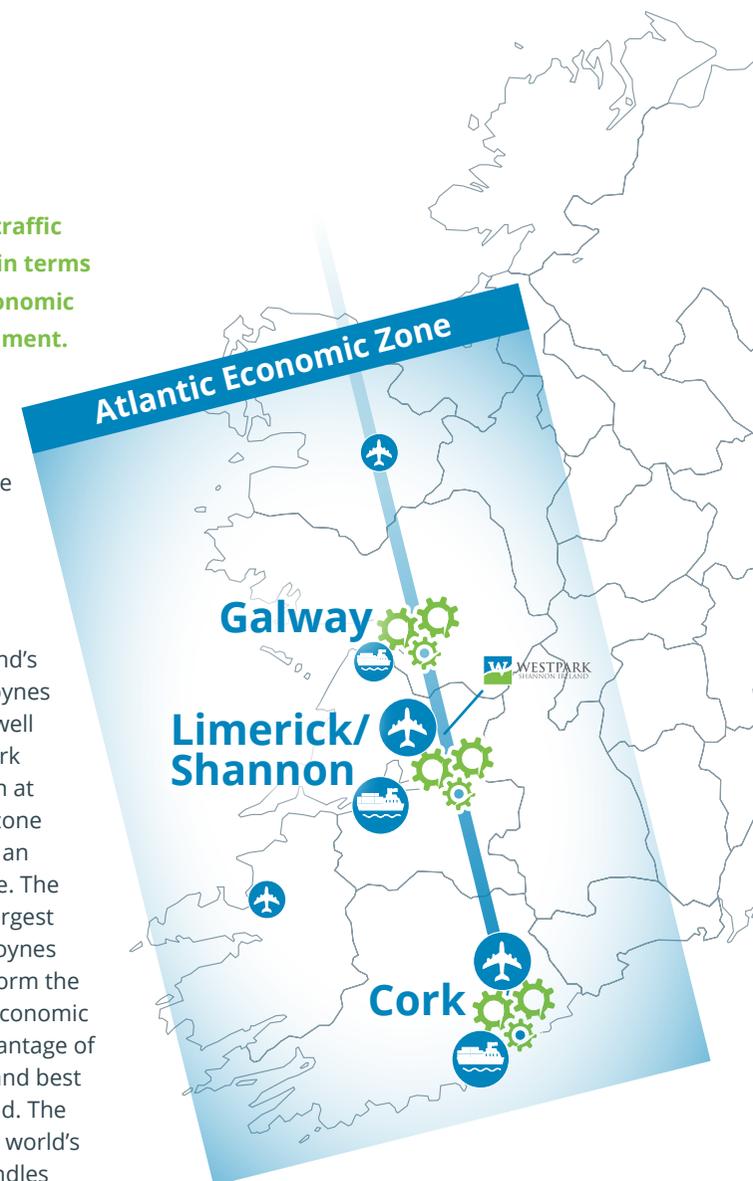


The 3-City Atlantic Economic Zone – Connecting the Zone, Connecting with Markets

International access has become massively concentrated at Dublin. It now accounts for almost 85% of passenger air traffic and 95% of air freight. Such over-concentration, which has increased over the last decade, is not serving Ireland well in terms of achieving better-balanced growth throughout the country. It is a factor in the ‘vacuuming in’ of more and more economic activity and population to the Dublin/Leinster Region. The effects of this have been referenced elsewhere in the document.

Here are some initiatives that would improve this:

- Connect the 3-cities within the Atlantic Economic Zone and support this with development initiatives. This would create a region of real scale as a counterpole to Dublin - a region with a very large population, capable of driving growth, and sustaining and benefiting from greater year-round direct air services.
- Aim to create a major growth spiral of economic activity by connecting and developing the 3-city zone. This would see the Atlantic Economic Zone promoted as an investment location, highlighting all of its advantages as a work and lifestyle region. As a result, more high-quality jobs would be created. More people would live and work in the area, and even more would become drawn toward it. There would be an improvement in the quality of life and an increase in spend on goods and services. The demand for quality would increase. More businesses would connect, thrive, reinvest and innovate. There would be
 - more exports and significant investment in tourism and lifestyle projects. More scheduled air services would now be sustainable, supporting even further growth in tourism and industry. More jobs would be created, more would come to live and work in the zone, and the growth spiral momentum would continue. This would become a real counterpole to Dublin, supporting improved access.
- Invest in critical infrastructure that either connects the Region or can improve its competitiveness by helping to open up gateways to world markets:
 - Develop the motorway between Cork and Limerick – Ireland’s second and third largest cities. This should be a priority for the 3-city zone, and would positively impact the regional economy in many ways.
 - Both Shannon Airport and Cork Airport have the potential for significant growth and should be supported. Shannon Airport, as a 24-hour airport, free from congestion and curfews, has ambitions
 - in relation to the growth of air services, air freight, and logistics. Westpark Shannon, adjacent to the airport, is home to a strong aviation-related business cluster and has the potential for further growth.
- Develop the zone’s ports. The Region is home to two of Ireland’s three Tier 1 ports (Shannon Foynes Port and the Port of Cork), as well Limerick and Galway Ports. Cork Port, and the deep-water berth at Ringaskiddy, can support the zone as an investment location and an international gateway for trade. The Shannon Estuary is Ireland’s largest bulk-shipment port, and the Foynes Port Company can help transform the estuary into an international economic and trading hub by taking advantage of what are among the deepest and best sheltered harbours in the world. The Estuary can accommodate the world’s largest ships and routinely handles Capesize and Panamax shipping.



Recommendations

Grow Tourism 365 to also Support our Wider Objectives

Tourism is hugely important to the 'Atlantic Economic Zone', and it has yet to achieve its full potential. It is obviously important to those businesses directly connected to the sector. However, its importance goes beyond this.

Developing our tourism products and services will add to the zone's appeal as a lifestyle location, and help all businesses to attract, retain and energise the best talent. In addition, because tourism can attract increasing numbers from overseas, it can help underpin direct air services to the zone.

- Overseas Tourism to all Regions of Ireland is growing, with Dublin's share of revenue increasing, partly due to increasingly concentrated air services. 84% of all air arrivals are now via Dublin. This over-concentration is a negative for Regions and is influencing overseas bednight shares, tour programmes, seasonality, travel patterns through Ireland, and the quality of the visitor experience outside of Dublin.
- Less than 26% of the hotel bednights in the West are by overseas visitors. In contrast, over 44% of Dublin's hotel bednights are. The West is therefore more dependent on domestic business.
- The Western Regions are also highly seasonal and over 40% of hotel rooms in the West are empty during 5 months of the year, compared to just one month (January) in Dublin.

There are a range of initiatives that could be undertaken to improve tourism **year-round**.

For example:

- Build upon the Wild Atlantic Way - a powerful initiative (however, its geography is different and it is primarily focused on the coast, so excludes some areas of potential).
- Improve City-Break experiences across the 3-cities (these are particularly suited to year-round tourism).
- Encourage greater investment in major destination-influencing tourism projects, attractions, activities, flagship festivals and events of scale in the zone.
- Develop sports tourism (spectator sports, participative sports, training camps, elite athlete training, etc.).
- Develop health tourism (such as world-class medical facilities for certain procedures, and offer a coast or country recovery environment).



Fastrack Progress - Westpark Shannon is an example of a project poised for accelerated growth

The speed at which growth has been concentrated around Dublin, particularly during the last two decades, has been remarkable. There is nothing to suggest that this won't continue apace.

With 2040 over two decades into the future, there is a need for urgent actions and progress, in line with the vision of more balanced growth. This should be happening NOW, where it is obvious the actions are in line with achieving the spatial objectives.

There are projects that could be prioritised. Westpark Shannon is one – and there are others. In Westpark Shannon's case, it perfectly fits the profile of what is needed:

- It is right in the heart of the 3-City 'Atlantic Economic Zone' and is part of the Limerick-Shannon 'City'.

- It is a world-class international business campus, with the capacity to RAPIDLY grow from a community of 2,000 business people to 5,000.
- It attracts the brightest companies. On-campus enterprises include GECAS, AerCap, DHL, AXA, Pepper, Lufthansa Technik and Enterprise Ireland. They each employ highly-talented staff in the growth sectors of the future.

The landscaped park is ready now for expansion. Planning permission is in place for its next phase, and it is 'shovel ready'. The entire 40-acre park is also future-proofed for ICT and has a carrier-neutral, world-class fibre-optic network.

The Positive Impact of Advancing this Project

Westpark Shannon can quickly expand, on a phased basis, to accommodate businesses employing 5,000 employees over the next three years. This would mean:

- Up to **3,000** new, talented executives employed in the zone.
- Extra salary earnings of close to **€225 million** per annum.
- **A huge spending stimulus** within the zone, supporting existing and new businesses.
- **A return for the exchequer** from tax on employee earnings and corporate tax.
- Help in **underpinning air services**.
- Executives from new businesses acting as **ambassadors to attract others** to the zone.
- Because of the **multiplier effect**, each one hundred jobs at Westpark Shannon will help create many more within the service economy and other areas.



Drive the Spatial Strategy and Track Progress

The failure of the previous spatial strategy, and other spatial initiatives, means that Ireland has to get it right this time. The National Planning Framework must be an effective strategy to improve our society and to achieve more balanced regional economic growth, optimising that growth across all Regions and sub-regions.

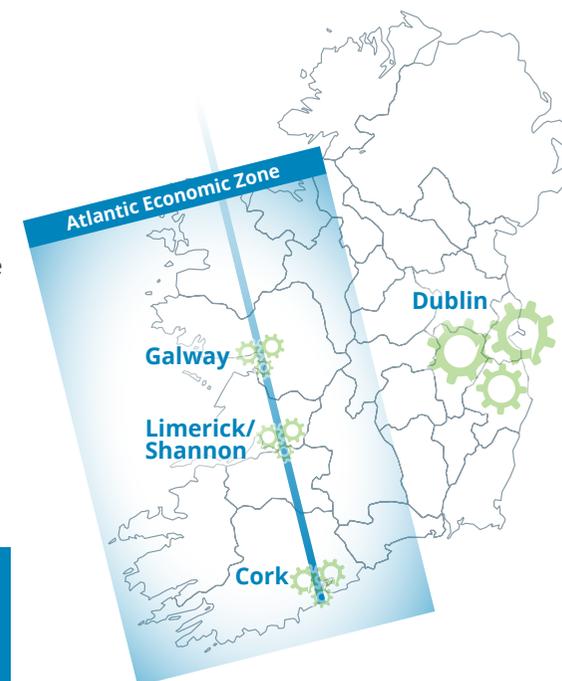
It should be both a 'growth' and 'growth absorption' strategy and it should influence where people can live, work, learn and enjoy life. It should set targets that will see Dublin continue to prosper, but enable the rest of Ireland to accelerate and fully realise their potential, increasing their share of economic activity, and contributing more strongly to the overall performance of the Irish State.

In terms of implementation, and monitoring, we are happy to echo some of the points in the National Planning Framework consultative document, but have added our own:

- We agree the National Planning Framework should be a statutory document, approved by the Oireachtas.
- The National Planning Framework must have clear and measurable objectives and specific targets for growth. Each objective must be accompanied by a clear set of parameters. These parameters must be capable of regular measurement by an appointed party.
- It is essential that objectives and growth targets should be set for Cities and Regions. It is not sufficient to have general targets e.g. x% of growth should happen outside of the greater Dublin area. Setting objectives, with measurable and monitored targets and backed by a driven strategy, gives us the best prospect of success.
- It should be backed by Government, both in terms of the Executive and across all Departments and Agencies. In addition, it should be a DRIVEN strategy with the appropriate departments and agencies (e.g. IDA, Enterprise Ireland, Fáilte Ireland, Tourism Ireland, Local Authorities etc.) specifically tasked to help deliver on aspects of the strategy and be accountable for the delivery of these, against set targets and within their remit.
- Objectives must be monitored by a designated body. Monitoring should be defined as a process of review and reaction. Where objectives are not met they should be interrogated and changed.
- The NPF should be the subject of a review after two years, and thereafter should be reviewed every three years. Each review should be informed by the outputs from regular monitoring.
- Furthermore, we believe there should be a Minister for the Regions, whose portfolio includes delivering the objectives of the NPF and the subsequent regional planning and economic strategies.

A KEY OBJECTIVE

From a Westpark Shannon perspective, a key objective within the framework should be that the development of the 3-City Atlantic Economic Zone, of which Westpark Shannon is a key constituent, is driven to help Ireland achieve its overall objectives.



Appendix

Westpark Shannon, home to some of the world's best and brightest globally-trading companies... and ready to welcome the next wave of dynamic businesses to Ireland's smartest business campus.



Westpark Shannon – Already impacting the Regional Economy

Westpark Shannon is a 40 acre, world-class international business campus, and includes one million square feet of office space. It is already a community of close to 2,000 people, which will expand to over 5,000 during the next few years.

Westpark is now home to over 50 companies including major enterprises like GECAS, Pepper, AerCap, DHL and Enterprise Ireland. They choose Westpark because of the competitive advantages the Region offers and because of the exceptional offices, facilities, services and supports available at the landscaped park.

In addition to the strategic location advantages, there are many other reasons to locate at Westpark Shannon include.

- Westpark is an iconic home to some of the world's brightest companies.
- Westpark boasts a lush landscaped campus providing a peaceful and perfect work environment.
- Westpark is a 'talent magnet' and attracts a highly talented workforce.
- Westpark offices are designed to facilitate networking and collaboration, with meeting rooms and conference facilities, along with restaurants and cafés in which to meet up.
- Westpark is future-proofed for ICT and has a carrier-neutral, world-class fibre-optic network.
- Westpark can accommodate all office requirements from small 'quick start' offices to corporate HQs.
- Westpark can easily facilitate expansions.
- Westpark has an on-site facilities management team providing supports and services to businesses at start-up and throughout their growth journey.





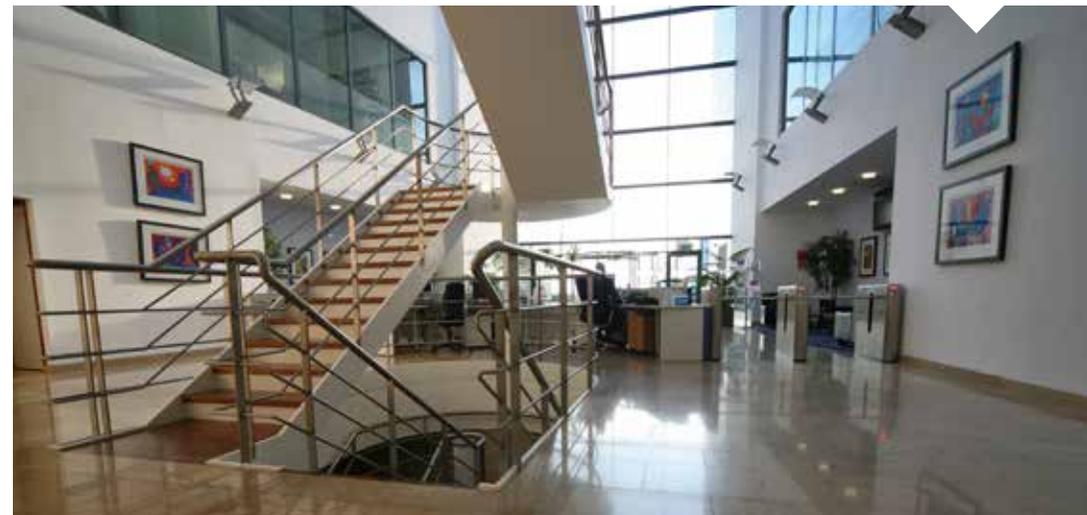
Westpark Shannon is home to **50 internationally trading businesses** with almost **2,000 employees** on campus, earning over **€150 million per annum** and contributing strongly to the local and regional economy.



Westpark Shannon is ideally suited to large or small companies in **aviation, logistics, finance, big data, software, publishing, ICT** and **business services**. It is already home to major enterprises like **GECAS, Pepper, AerCap, DHL** and **Enterprise Ireland**.



Westpark Shannon's **on-site management** team maintains the 40-acre campus to the **highest standards**.



Westpark's impressive multi-storey buildings accommodate offices of the **highest quality. Spacious, bright, air conditioned, energy efficient and secure,** they provide a perfect work environment conducive to individual and team performance.



Westpark Shannon is now preparing to welcome the **next wave of dynamic businesses** to Ireland's smartest campus.



The smart offices in the new phase at Westpark Shannon will be home to more **dynamic businesses**, led and driven by a talented workforce. Everything about the new workspace will facilitate individual and team performance. It will provide a wonderful space in which to work and collaborate – with a wide range of support facilities including **meeting and conference facilities, restaurants, cafés, shops, gym and activity centre, and outdoor walking trails.**