Going West: Development and regeneration in the western region
March 9th 2017

Ian Brannigan

CEO (Acting)

Western Development Commission (WDC)
The Western Development Commission
Serving a confident and ambitious Western Region where excellence, innovation and creativity are rewarded, and the rich quality of life, clean environment and unique heritage are valued and safeguarded.

Our Vision
To be the hub for the strategic economic and social development of the Western Region.

Counties in the Western Region
There are seven counties in the Western Region: Donegal, Sligo, Leitrim, Roscommon, Mayo, Galway and Clare.

The WDC operates under the aegis of DAHRRGA and its remit is to promote, foster and encourage economic and social development in the Western Region.
WDC impact on western region
WDC - Regional Development for Regional Business

**JOBS**
5000 Regional Jobs supported (Direct & Indirect) by WDC

**INVESTMENT**
€12.4 M invested in region 2014-16
For Regional Business

SME ENGAGEMENT

Currently WDC engaged with and supporting >500 regional businesses

MARKETS

PRODUCT DEVELOPMENT

FINANCE

> 500 REGIONAL BUSINESSES
WDC -
A unique capacity for Western Region
The WDC Organisation

Strategic DEVELOPMENT capacity for region

Growing regional employment and enterprise in the regional economy. E.g. Bio-economy, Creative economy, Niche Tourism etc.
The WDC Organisation

EU PROJECTS Capacity for region

EU programme implementation capacity for region established

Involving the region in EU growth programs totalling €11M in value (currently employing a team of 3)
The WDC Organisation

Access to Finance for the region

134 BUSINESSES SUPPORTED

€48 M DISBURSED

€207 M Leveraged for enterprises
For the WDC Organisation

POLICY TEAM

Evolved capacity to analyse and inform on regional dynamics e.g. via the WDC Insights Blogs and Briefing initiative (e.g. Population and workforce analysis), submissions for region on national policy priorities (e.g. Broadband, Rail freight, Energy etc.)

INSIGHTS BLOG

BRIEFING

POLICY

BRIEFING

WDC POLICY ANALYSIS 2016

MAKING THE CASE FOR THE WESTERN REGION

REPORT
INFORGAPHICS
CONFERENCE INPUTS
SUBMISSIONS
PRESENTATIONS
WDC INSIGHTS

ANALYSIS OF SOCIO-ECONOMIC DATA
ENGAGING WITH POLICYMAKERS
SUPPORTING LOCAL & REGIONAL STAKEHOLDERS

@WDCInsights
https://wdcinsights.wordpress.com/
www.wdc.ie
The WDC Organisation

REGIONAL PROMOTION - A proven capacity for region

WWW.Lookwest.ie platform engaged with and accessed by ever increasing numbers. Over a million visits to date and almost 20K citizens engaged via regional social media. National Egov. Award winners 2016.
LookWest.ie: The online guide to Business, Work and Life in the West of Ireland
Western region key points
Western region - Internationally competitive!

West of Ireland well positioned against benchmark regions - Wales / NI / Highlands etc.
Established and Emerging clusters

“Prameric Systems Ireland—the largest employer in northwestern Ireland—attributes its success to the talent and commitment of its employees and the quality of the technology services we provide”.

Caroline Faulkner, Senior Managing Director and Chief Information Officer Pramerica Systems Ireland.

It takes an extraordinary place to offer a skilled talent pool, excellent quality of life, good infrastructure and accessibility all in one region. The seven counties of Ireland’s West offer companies a great place to do business.

Med Tech & Pharma in the West

Already a home to so many household names in the Med Tech and Pharma sectors...

Creative Sector in the West

- Nadura
- Station House Media
- EDEL MacBRIDE
- Pat Gillen
- The Mood Designs
- Roche
- open.kenny
- ceramic
- GNOSS
- GlaxoSmithKline
- jewellery, art & craft classes, workshops & parties
- Abbott
- Martina Hamilton
- Tree Light Pictures
- Allergan’s Botax is produced mainly in Westport, Co Mayo
- ARO Digital Strategy
- Loch Bó Films
- DONEGAL TV
Quality of Life

“The West of Ireland provides us with the talent, infrastructure and quality of life that makes our operation a key player in the worldwide Coca-Cola Business System.”

John McGowan General Manager, Ballina Beverages

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The Western Region in Numbers

It all adds up to real potential

- 1/3 of our Population under 25 (youngest population in the EU)
- 2/5 3rd level educated (highest rate in western world)
- Direct access to EU and US Markets
- 2 International Airports + 3 Ports
- Internationally recognised business location
- Low cost of Living
- High Quality of Life

Quality of Life

More than just a wonderful place to invest

From stunning natural beauty, a rich culture and heritage, wonderful festivals, superb sporting facilities and more, we have it all. And when you add in the warm welcome that you’ll get, you’ll know that the West is more than just a great place to invest.

And it’s not just us that say that....
“One of the key benefits the West of Ireland has to offer is the availability of a skilled and talented workforce.”

Conor Murphy, Site Director, Abbott Laboratories

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World-Class Institutions

- O'Gallagh NUI Galway
- GMIT
- IT Sligo
- lyit
- NCBES
- Moore Institute
- CERIS
- DERI
- REMEDI
- Marine Institute
- SFI

Research Centres

One of 'Top 200 Worldwide Universities'
LookWest and you will find an amazing place to live and spend your quality time. There are seven counties to explore including Donegal, Sligo, Leitrim, Roscommon, Mayo, Galway and Clare.

Patrick Keeney, Green Golf Travel in Donegal
We speak with Donegal-based Patrick Keeney who set-up golf travel...
January 31, 2017

Case Study: Ciaran Byrne, Martha Kearns, StoryLab Content and PR Agency, Sligo
In our latest case study, we speak to Ciaran Byrne and Martha...
August 31, 2016

Louise Kilbane, Managing Director of Lollipop Lane Creche, Tubbercurry, Co. Sligo
Louise Kilbane is managing Director of Lollipop Lane Creche Montessori...
July 31, 2016

Mary Rodgers, The Portershed Co-Working Space
Mary Rodgers is the Innovation Community Manager at The PorterShed...
June 27, 2016

Catherine Devlin – Wild Atlantic Way

Tommy Griffith – PEL Waste Reduction

Barry O’Sullivan and Joe Smyth – Altocloud

Maire McKeogh – Sealed with Irish Love
POPULATION IN THE REGION

<table>
<thead>
<tr>
<th>Region</th>
<th>Population 2016</th>
<th>Change 2011-2016</th>
<th>% of State Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Western Region</td>
<td>828,124</td>
<td>+0.9%</td>
<td>17%</td>
</tr>
<tr>
<td>State</td>
<td>4,757,976</td>
<td>+3.7%</td>
<td></td>
</tr>
</tbody>
</table>

Housing: 20% of State Housing Stock
Vacancy Rate: 22%
Land Mass: 37% of State

THE WESTERN REGION HAS

Employment: 17% of people at work in Ireland
Unemployment: 18% of unemployed in the State
Self Employed: 23% of people at work in the region
Enterprises: 16% of active enterprises in the State
Income: 92% of State average per person disposable income
WIND ENERGY
28% of Irish installed wind energy capacity

BROADBAND
34% of national broadband plan area premises

TOURISM
28% of Ireland's revenue from overseas tourists

VEHICLES
15% new cars licensed first time in 2015

RAIL FREIGHT
3/4 of services start or end in the western region

REPLACING
9,000 road journeys per annum saving 2,300 tonnes in carbon emissions

DECEMBER 2016
Western region Summary

• WHAT IS -
  • West of Ireland Region offers key competitive advantages - many global (Human Capital, Quality of Life, Relative cost base, Global location, Natural resources)
  • West region already choice for significant clusters - Med Tech, Life-science, Tourism
  • Emerging sectors on global stage apparent - Marine, Renewable Energy, Creative economy

• WHAT COULD BE -
  • OECD recommends investment on competitive advantage for Regions
  • Quality of life premium in region will be greatly sought after in coming years
  • Critical current infrastructure investment gaps for region should not become “embedded”
  • Total solution approach to NPF could be considered - Socio-economic implementation capacity for region should be aligned with spatial investment
THANK YOU
History and purpose of the WDC

The WDC was set up in 1998 in the Western counties (Donegal, Sligo, Leitrim, Roscommon, Mayo, Galway and Clare). The recognition that political will and focused attention would increase national economic growth to the benefit of all our citizens. The general functions of the WDC are set out in the Western Development Commission Act 1998 as being:

The WDC – a capability for the region

to promote, foster and encourage economic and social development in the Western Region

The WDC has developed a way of working that delivers a unique and effective response to the development challenges of a predominantly rural region. The WDC is an efficient agency which implements economic development and growth in the Western Region. Furthermore it adds value and regional ‘sensitivity’ to the work of national and international bodies and actively engages with regional interests through a combination of:

IMPLEMENTATION

Initiation of regional programmes with relevant stakeholders to deliver sustainable development in a largely rural region.

INSIGHT

Development of a robust information base on regional issues which provides an acknowledged valuable input to national policy-making in areas such as energy infrastructure and broadband.

IDENTITY

Promote and build a globally recognised, regional identity through the www.LookWest.ie website which has attracted more than one million visitors, currently engaging more than 17,000 people through its social media channels. This platform attracts talent and enterprise to our communities in the Western Region.

INVESTMENT

Operating the Western Investment Fund (WIF) as a unique source of risk capital for entrepreneurs in the Western Region.
The Impact of the WDC to date

Investment in regional jobs
Since 2010 the WDC has sourced and directed over €13M in total funding towards regional enterprise and employment development.

Regional Policy and analysis capability
This regional capacity has led to advances in critical infrastructure such as broadband roll out, proliferation of the gas network to towns in the region, showcasing novel growth sectors such as the creative economy and ensuring the region is at the forefront of growing these areas.

Realisation of regional jobs
In recent years approximately 5000 jobs (2700 direct and 2300 indirect), have been significantly supported by the WDC in the region (many through the Western Investment Fund).

Regional capability to access EU programming funds
The WDC now has a regional capacity to develop and deliver significant funding across a range of key growth sectors. The WDC are currently engaged in EU projects with a total value of €6M. In addition, local authorities have access to over €5M in low interest loans. The WDC has developed initiatives in critical regional growth sectors such as Renewables, Bioenergy, The Creative Economy, Cultural Tourism and the Business Sector.

Regional “access to finance” capability
The Irish Government established the WIF to be a unique source of risk funding to businesses and communities in the region. This has increased the regional access to venture capital (VC) funding from 3% of State average to over 7% in the last 10 years.

Building a Future for the Region

However despite the progress made to date, key indicators highlight the continued and critical need to focus on the development and growth of the Western Region to realise its economic place and potential:

- Preliminary statistics for 2014 show that Regional GDP per person in the West region was 76% of that in the State (€29,113 vs. €37,186), the Border region a mere 63%.
- Slower jobs recovery – growth in employment in the Western Region between 2012 and 2013 was just 2.8%, less than half that in the rest of the State at 6.3%.
- Higher youth unemployment – the youth (15-24 yrs) unemployment rate in the Western Region is 30.3%, substantially higher than the 26% in the rest of State (Q1 2010).
- The Border, Midlands and Western Region has a higher consistent poverty rate (10.6%) compared to 7.0% for the Southern & Eastern Region (2014)\(^1\).

Summary

The WDC contributes and makes a significant and measurable difference to the Western Region.

It has sought to establish a capability for future growth both for the region and its citizens.

In the process, it has identified and championed new areas of regional strength. It has also sought to deliver a capacity for communities to design, fund and deliver lasting programmes of growth for the Western Region.

\(^1\) CSO Income & Living Conditions, 2015
Population change

- The Western Region population was 828,124 people in April 2016. It increased by 7,244 people since 2011 (0.9%). The state population was 4,757,976. It increased by 3.7% between 2011 and 2016.

- Three counties in the Western region showed population decline (Donegal, -1.5%, Mayo -0.2% and Sligo -0.1%)

- In all counties there was higher growth in the female population than the male population. In the Western Region there was a 1.5% increase in the female population and 0.2% in the male population. For the rest of the state the difference was less (males 4.2%; females 4.4%).

- More EDs in the Western Region experienced population decline (533) than showed population growth (433). 262 EDs had a population decrease of more than 5%. 16 had population decreases of more than 15%
% change in employment by sector in Western Region & Rest of State, 2012-2016
<table>
<thead>
<tr>
<th></th>
<th>Border</th>
<th>Midland</th>
<th>West and Mid East</th>
<th>Dublin Mid West</th>
<th>South East</th>
<th>South West</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>GVA per person 2013</td>
<td>€21,445</td>
<td>€20,923</td>
<td>€26,839</td>
<td>€46,213</td>
<td>€29,305</td>
<td>€25,092</td>
<td>€40,394</td>
</tr>
<tr>
<td>GVA per person 2014 (preliminary)</td>
<td>€22,459</td>
<td>€22,002</td>
<td>€28,113</td>
<td>€48,582</td>
<td>€30,695</td>
<td>€26,282</td>
<td>€42,059</td>
</tr>
<tr>
<td>2013 Index of GVA per person (state=100)</td>
<td>60.5</td>
<td>59.0</td>
<td>75.7</td>
<td>130.3</td>
<td>82.6</td>
<td>70.8</td>
<td>113.9</td>
</tr>
<tr>
<td>2013 Index of GVA per person (EU28=100)</td>
<td>79.8</td>
<td>77.9</td>
<td>99.9</td>
<td>172.0</td>
<td>109.1</td>
<td>93.4</td>
<td>150.3</td>
</tr>
</tbody>
</table>
% of active enterprises by sector, Western Region & Rest of State, 2014

- Industry: Western Region 7.6%, Rest of State 6.8%
- Construction: Western Region 25.0%, Rest of State 18.8%
- Wholesale & retail: Western Region 20.3%, Rest of State 18.9%
- Transportation & storage: Western Region 10.8%, Rest of State 7.8%
- Acc. & food service: Western Region 10.5%, Rest of State 6.8%
- Information & comms: Western Region 3.7%, Rest of State 6.2%
- Financial & insurance: Western Region 1.4%, Rest of State 3.0%
- Real estate: Western Region 5.3%, Rest of State 4.9%
- Prof., scientific & tech.: Western Region 11.7%, Rest of State 17.2%
- Admin. & support: Western Region 6.3%, Rest of State 6.5%

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WDC Insights
providing insights on key issues for the Western Region of Ireland
Enterprise base differs between more urban and more rural counties

- Construction, Wholesale & Retail largest sectors in all western counties but enterprise base differs.
- Highly rural counties of Roscommon, Mayo & Donegal have 34-36% of enterprises in Industry & Construction but in more urban counties of Clare & Sligo it is around 30%.
- Higher share of enterprises in Galway & Sligo in knowledge services sectors, though even Galway below national average.
- Over 40% of businesses in Donegal & Leitrim in local services; Galway has smallest share due to more diverse enterprise mix.