

CARNMORE

CARNMORE SITE FEASIBILITY

2015



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EXECUTIVE SUMMARY

The objective of this study is to consider how the potential of this strategic location can be utilised and be of most benefit on a regional basis. The study represents both a considered response to recent economic and market conditions and a commitment to consider optimal future uses at Carnmore.

In order to complete this study a comprehensive consultation process was undertaken encompassing key stakeholders and interested parties. Potential future uses for the location were considered and evaluated in line with current policy and economic conditions and also with the expressed views of those interviewed as part of the consultation process.

This analysis identified several possible future uses that were each examined with regard to pertinent policy and economic factors. As can be seen from the report these varied from some low intensity activities to some more intensive activities such as a mixed use business park.

Potential uses were evaluated in terms of:

- a) policy considerations,
- b) strategic location,
- c) international best practice.
- d) the consultation process,

It is clear that the future use of the property will be partly determined by its suitability for that use but also by the local authorities determination that the socio- economic return to the

region is maximised over the short, medium and longer terms. A further key aspect of this decision should be to attempt to ensure that the chosen project/ projects have a sustainable economic viability over a reasonable period into the future.

It is recommended that expressions of interest are sought from interested parties for the future development of this property. Given the extensive nature of the property in question it is possible that allowance could be made for a number of activities since no single use may require the large area currently available at this location.

It is therefore recommended that expressions of interest should be sought from parties interested in the establishment of a creative campus centred on the promotion/ enhancement of the film industry and also the development of a complimentary mixed use business park. It should be noted that these varying uses scored highly on the overall evaluation analysis and would provide a unique evidence-based proposition for Galway.

An Expression of Interest process and/or a coordinated effort between agencies and the various industries should be considered i.e. some coordinated effort by those within the creative sector is required in order to move forward as a mixed use facility that includes the film, creative arts, food and technology sector. Consideration should be given to establishing a 'creative taskforce' to examine this approach.

1 INTRODUCTION

Context

The Property

Strategic Strengths of Galway

Galway City Council and Galway County Council jointly completed the acquisition of the Galway Airport property in June of 2014. The local authorities now wish to examine how the alternative use of the asset can best contribute to the economic wellbeing of the region. The local authorities commissioned this study in order to determine the most effective course of action for the reuse of this strategic property for the benefit of Galway City, County and the wider Region. The potential of the property was recognised by Galway City and County Councils and as such, its acquisition was identified as being a priority in order to capitalise on the opportunity which the property represents for the economy of the City, County and Region.

The property sits close to the existing M6 motorway and the Galway-Dublin rail line. Accessibility will be further augmented on completion of the M17/18 motorway. Lying circa eight kilometres east of Galway city centre, and close to the significant employment centres of the region, the property offers clear strategic advantages. The new road proposals will dramatically improve links to Galway city centre, and significantly reduce travel times to other parts of the region. The question this study seeks to answer is how those advantages can be maximised for the benefit of Galway and the greater region. Both Councils are seeking to unlock the potential of the property by identifying a range of uses that will create a unique offering that will be an identifier for Galway and the region. A roadmap for the future of the property will be outlined in the subsequent sections of this study after extensive consultation and an examination of several potential uses.

Context

The overall context for aviation in Ireland has changed dramatically in recent decades. Unprecedented economic growth from the mid-1990s to 2008 led to significant investment in transport infrastructure. Upgrades in Galway-Dublin road and rail connections drastically reduced journey times between the two cities, and linkages between Galway and other population centres also improved significantly. This in turn reduced the attractiveness of scheduled internal air travel within the Country and also external travel from regional cities. The onset of the economic downturn in 2008 further reduced numbers using the airport, while the ensuing crisis in the public finances coupled with alternative air transport options in Shannon and Ireland West/Knock led to the withdrawal of the public subsidies that had supported Galway Airport. This decision was taken following the Value for Money review conducted by the Department of Transport in 2010. When compared to bus and rail travel over the previous five years, the combined Opex subvention and Public Service Obligation (PSO) per passenger of airport regional air services cost twice as much as rail travel and over ten times as much as bus travel. The airport ceased working as a scheduled-flight commercial passenger facility and was given over to private aviation until its eventual closure in 2013. The property is now the subject of a short-term lease, and is used for private flights, flying club operations, and some fire training and other ad hoc uses.

The way forward for the future development of the property is explored in this study. The options in terms of the potential alternative types of use are examined and requirements to enable the Councils to make an informed decision are identified. During the drafting of the report, the Local Authorities issued a call for short term Expressions of Interest in order to gauge the type of themed interest in the site, bearing in mind that the current tenant's aviation license and lease would be expiring at the end of 2015. It is intended that the short term EOI was to have no impact on the terms of this report, as this report was to delve further into the use of the site for a significantly longer period of time.

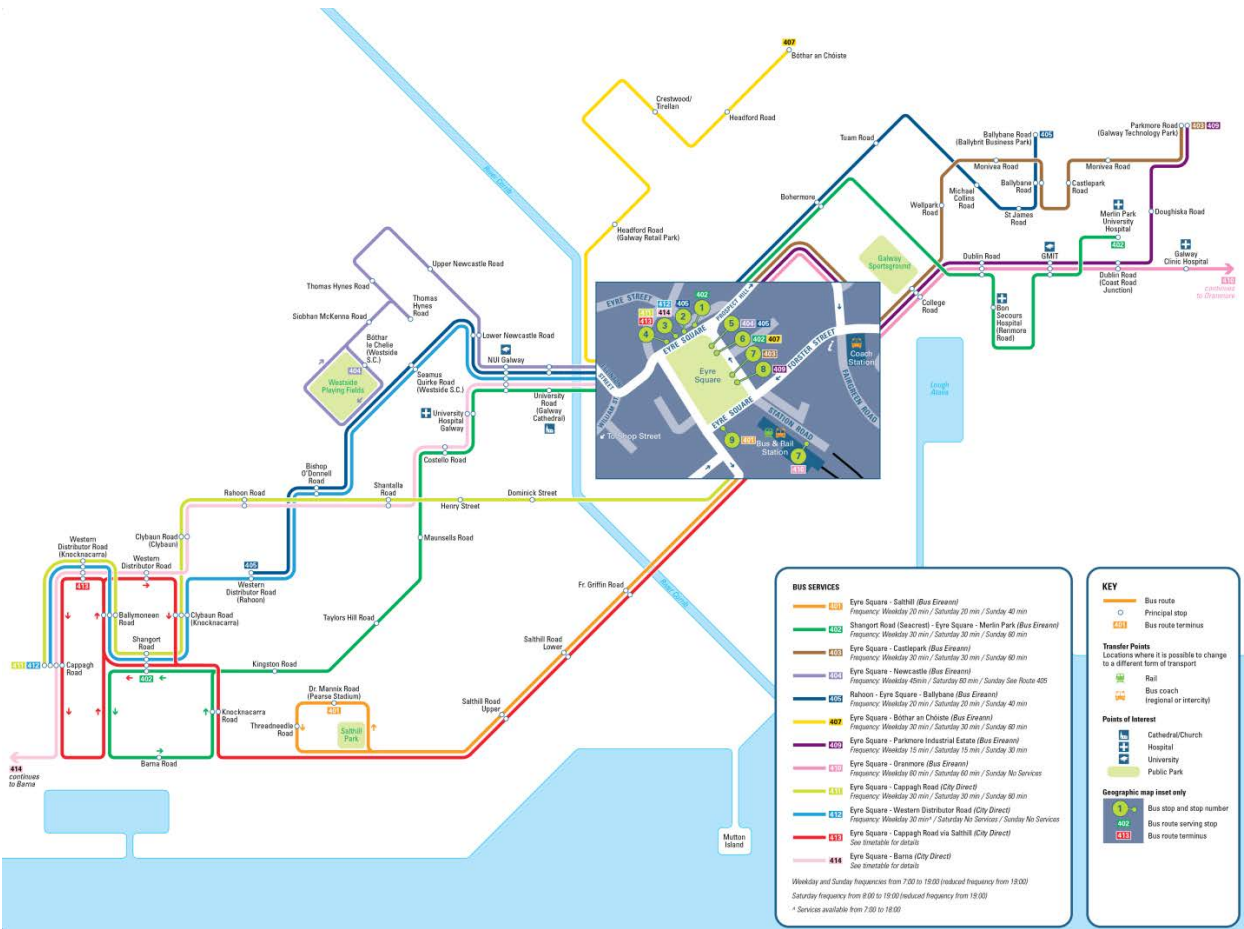
The Property

The Carnmore property (formerly Galway Airport) is located 8.8 kilometres to the northeast of Galway City Centre. The property is physically separate from the built form of Galway City by a greenfield area including the Ardaun lands which are located to the west of the property. The property is bordered to the north by a small number of residential units and the former Steiner Factory (Steiner first commissioned the aviation use in 1974).

The property has good strategic access including to Galway City as well as to both the regional and national road network. The property has good regional road access with the N18 and the M6 in close proximity (less than 2km from the property). The R339 is more limited in capacity but does provide a link to the city. There is currently no rail accessibility to the property (the nearest station is at Oranmore). Public transport connectivity is limited, however if development occurs at Ardaun then there may be scope to extend the services to the area.

The area of the land is 46.5 hectares and it is orientated in an east-west direction. It is strategically located just off the N18 and M6. It currently has one access point onto the R339, however it has other road boundaries including the N18 and a local road to the west, with some residential units situated along it. The property is relatively close to the existing IDA centre in Parkmore, and within easy access to other IDA centres at Oranmore and Athenry. The accessibility of the property will be further enhanced on completion of the M17/M18 Motorway, the path of which will be proximate to it. The property is substantially located within the Gaeltacht.





The terminal building was upgraded in 2007 and is of steel frame construction with glazed frontage covered in profile metal cladding under a flat roof. Internally it is open plan with dedicated office, bar, departure area and toilet facilities. There are presently three car parks serving the terminal and hangar buildings. There are two hangars of steel frame construction with concrete block frontages and incorporate some office space.

It may be that the existing buildings could be capable of adaption and re-purposed for other uses. The nature and extent of the main infrastructure is outlined below.



Structure	Sqm	Condition
Terminal Building	1,296	Good
Hangars (Combined)	1,500	Good
Car Parking	15,500	Good

Strategic Strengths of Galway

County Galway and City has a combined population of 250,653. There are 6,555 commercial organisations spread across the Galway County area (taken from Geodirectory data). The CSO figures (2011) indicate that there are 69,152 people in employment in County Galway. There are 16,815 enterprises in the region. This is a ratio of 1:26 of enterprises to regional population, which is in the mid-range compared to other regions in Ireland (e.g. Dublin is 1:22, while the Midlands is 1:31).

Galway City is the largest city in the west region and in Connaught. Galway has good access to both the regional and national road network. It has direct national road access to both Dublin and Limerick (upon completion of the M18). Galway also has good national rail access.

Galway is home to TG4, the national Irish language TV station. Connemara has a cluster of audio visual companies with the success of TG4 influencing the establishment of 40 companies. Galway is also now one of five UNESCO Creative Cities having been designated a UNESCO City of Film in 2014. It has been identified that 1 in every 33 jobs in the Western Region is in the creative economy (Source: Galway County Draft Economic Baseline Study Summary Study). The audiovisual sector is worth €72 million employing over 600 people and the employment rate is growing at a rate of 24.5% (Source: Galway County Draft Economic Baseline Study Summary Study).

Galway is part of the Wild Atlantic Way route and the tourism industry in the County has seen an uplift in recent years. Galway's inbound overseas visitors increased at a higher rate than Ireland as a whole at 10.3% between 2013 and 2014.

Galway is home to 4 of the top 5 ICT companies – IBM, SAP, Oracle and Cisco. There are 196 ICT organisations in Galway. There is a significant cluster of medical device companies, with Medtronic and Boston Scientific being the largest employers. Boston Scientific Ireland Ltd employs 2,800 individuals and Medtronic Vascular Galway Ltd employs 1,882 individuals.

Galway is home to the National University of Ireland Galway (NUIG) and Galway Mayo Institute of Technology (GMIT). NUIG ranks among the top 2% of Universities in the world. 25% of Galway City's population are students and there are 10,741 individuals employed within the education sector of Galway (Source: Galway County Draft Economic Baseline Study Summary Study).

In relation to agriculture, Galway has the sixth largest dairy industry, with the abolishment of milk quotes there may be opportunities for higher levels of milk production and for the use of milk in developing new food products.

2 RELEVANT POLICY & INTERNATIONAL BEST PRACTICE

Aviation Policy and Galway Airport

Policy Context for Future Development

Industrial Development Policy

Tourism Policy

Transport Policy and the Carnmore Property

Aviation Policy and Galway Airport

The context of air transport and the importance of regional airports as a means of internal movement within the Country have changed dramatically in recent decades. Policies at both European and National level have in effect reduced the desirability and the importance of regional airports within the National context. Policies at European level such as the **Roadmap to a Single European Transport Area (2011)** has emphasised the importance of the sustainability argument associated with transport modes and the potential risk of oil scarcity. This document emphasised the importance of utilising more energy efficient modes such as the train for inter-city journeys and set ambitious targets for high-speed rail networks in Europe.

At a national level, policies in relation to the improvement of the strategic road network have resulted in a high quality motorway network linking the main cities and towns in Ireland. The improvement of the road network has meant that previously inaccessible locations with poor connectivity are now within easy reach of the main centres of population and with the major international airports such as Dublin, Shannon and Cork. The importance of the regional airports was therefore diminished. The recently published **Draft A National Aviation Policy for Ireland 2014** focuses on the importance of the three State airports (Dublin, Cork and Shannon) to the national economy. It also discusses the importance of regional airports such as Donegal, Waterford, Ireland West Knock and Kerry to the regions in which they are situated. The status of Dublin as a hub and the role of the specified regional airports above outlines the importance of these facilities in terms of supporting regional development by affording linkages to the range of services available from Dublin.

The **Value for Money Review of Exchequer Expenditure on the Regional Airports Programme: Department of Transport, Tourism and Sport (2010)** called for the removal of State subventions to Galway Airport. The review concluded that the implications of the airport's loss of subvention would be the cessation of passenger carrying routes from the airport. The table below outlines the assessed performance of Galway Airport during the latter years of its subsidised passenger carrying services.

	2009	2008	2007	2006	2005
Total Number of Passengers	194,158	266,897	309,302	248,972	252,897
PSO Passengers	48,029	65,218	74,390	67,988	96,719

Galway Airport Passenger Numbers 2005-2009 (Source: Value for Money Review of Exchequer Expenditure on the Regional Airports Programme: Department of Transport, Tourism and Sport, 2010)

	2009	2008	2007	2006
PSO Subvention (€ millions)	€3.29	€3.30	€3.00	€3.04
PSO Cost Per Passenger	€68.00	€51.00	€40.00	€45.00

Galway Airport Passenger Subvention (PSO Figures) (Source: Value for Money Review of Exchequer Expenditure on the Regional Airports Programme: Department of Transport, Tourism and Sport, 2010)

Passenger numbers from regional airports from 2009, upon which the Value for Money Review was based are outlined in Table 5 below.

Airport	Passenger Number 2009
Galway	194,158
Kerry	356,246
Knock	607,228
Donegal	50,750
Sligo	26,706
Waterford	111,837

2009 Passenger Numbers (Source: Value for Money Review of Exchequer Expenditure on the Regional Airports Programme: Department of Transport, Tourism and Sport, 2010)

In reaching its conclusions, the VFM stated:

“To continue to support three airports (Sligo, Knock and Galway) in close proximity to one another does not make sense particularly where travel times by other modes have reduced over the last five years. Of the three airports in the region, Knock has the greatest potential to grow, attract airlines and increase routes, thereby improving connectivity to the region. It is also the only one of the three which has a runway capable of accommodating B-737 jet aircraft (or its equivalent). It has the largest existing passenger base and serves the largest number of routes with the largest number of airlines operating services from there” (DTTS, 2010, p 65)

Policy Context for Future Development

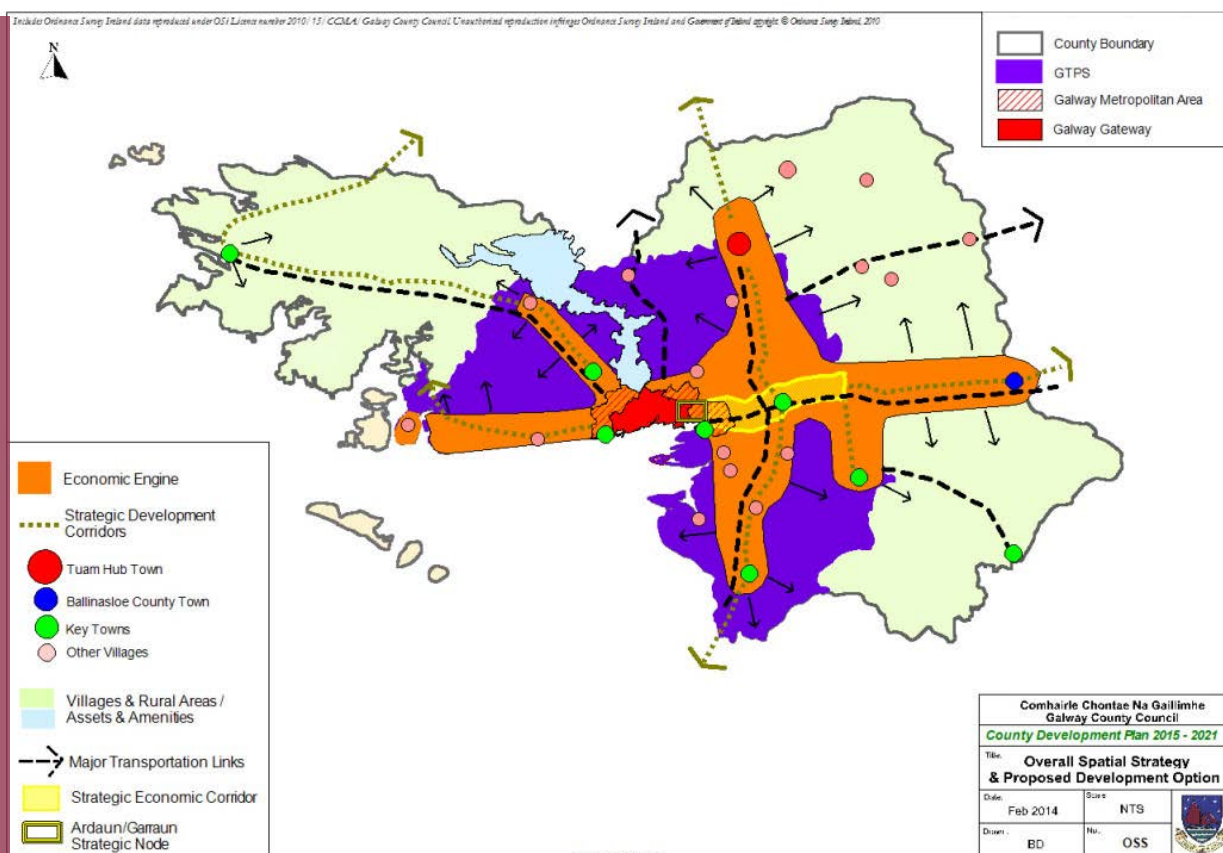
The **National Spatial Strategy 2002-2020 (NSS)** was created as the principal national strategic planning framework for Ireland. This document is soon to be replaced with a National Planning Framework. Under the NSS, Galway was designated as one of nine Gateways, each of which is intended to develop as the primary driver of sustainable economic and spatial development within their region. This has identified Galway as the primary driver of socio-economic growth in the West Region. **The Regional Planning Guidelines (RPGs) for the West Region 2010-2022** provide the framework for the specific development roles and capabilities for all urban centres in the Galway Gateway (and the wider West Region, including Counties Mayo and Roscommon). The RPGs were most recently updated in 2010 and will be subject to a fundamental review in 2016 following the reconfiguration of the eight regional authority areas (NUTS III) into 3 regional assemblies in 2014. In terms of substantiating the strengths of the region and bringing them to bear on the realisation of an active, viable and competitive western region, air transport figured prominently in terms of the benefits which it can bestow on urban centres and economic activities proximate to the location of the infrastructure. Specifically, in relation to Galway Airport, the guidelines state:

“The Regional Authority recognises the strategic importance of Ireland West Airport Knock and Galway Airports as an amenity and important transportation link to facilitate the growth and connectivity of the West region. The expansion of both airports and associated facilities and ancillary and complementary activities is supported” (Western Regional Assembly, 2010, p89)

While the guidelines do cite difficulties with runway length as being an impediment to the use of Galway Airport, it should be emphasised that the Guidelines also state that the airports within the region should be focused towards realising their market in differing sectors so as to ensure that all of the facilities play an active yet diverse role in sustaining the economy of the region. The longer term priorities for Galway, as set out in the “Gateway Investment Priorities Study” (2006), includes the need to strengthen the research and innovation capacity of NUIG and GMIT and improve linkages to enterprise in the region, more coordinated efforts to improve the provision of social infrastructure, improved rail links and improvements to water services/waste management infrastructure. The Carnmore property falls within the planning jurisdiction of Galway County Council. The Galway County Development Plan 2015-2022 lists the potential of the Carnmore property as being one of the strengths of the County. The Development Plan contains the below objective:

EDT-10: “Support the development of the former Galway Airport site at An Carn Mór for the purposes of an economic hub/strategic development site or other strategic use.”

This designation affords a wide degree of scope and flexibility in terms of utilising the property as an economic asset to the City and County. In the spatial strategy advanced for the County, the property is located in the area designated as the “Economic Engine” of the County as illustrated below.



Galway County Council Spatial Strategy (Source: Galway County Development Plan 2015-2022)

The Plan includes aims and objectives to encourage the future growth and development of the County. The high level aims include:

“To safeguard and augment County Galway’s extensive economic, tourism and employment base.”

“To facilitate large scale enterprise and development at strategic locations in the County.” (Section 4.2)

The Plan contains specific policies to promote economic development:

EDT-2: “Proactively pursue economic growth, enterprise and employment in the County in conjunction with the relevant state agencies and government departments in a manner that synchronises with the policies and objectives as set out in national, regional and local strategies.”

EDT-7: “Support the development and marketing of the Arts, culture, heritage, foods and crafts of the County through networking and developing trade links with regions, locally, nationally and internationally.”

The Plan contains specific objectives under these policies including:

EDT-1: “The objectives for the Strategic Economic Corridor include:

- To seek to reserve lands to support nationally and regionally significant activities and to attract specialist enterprise development that is large scale or high value”

EDT-3: “Support exploratory research, pioneering projects, new start up businesses/industries and retraining programmes in conjunction with the development agencies and educational/research institutions.”

The Galway City Development Plan 2011-2017 recognises the importance and value of Galway Airport to the city as a transportation link and as a valuable infrastructural asset in terms of its capacity to secure further investment and activity for Galway City, its environs and the wider region. It supports the provision of public transport routes to and from the Airport and also outlines the manner in which the Airport can stimulate growth to sustain the economy of the Region.

The strategy for Galway is to “support and facilitate the sustainable economic development of Galway as a Gateway for the West Region”. The Plan contains a number of policies relating to enterprise including:

“Promote facilities and foster the development of indigenous industry as a fundamental and ` integral part of the local economy and work with all relevant agencies in this regard.

Co-operate with Galway County Council in the servicing of strategic employment opportunities at designated business and technology parks on lands outside of the city boundary, in particular with regard to strategic and sustainable transportation services.

Continue to support and facilitate the development of start-up enterprise units for local indigenous enterprises throughout the city.

Support and promote the development of the arts, culture and film industry recognising the particular value of these activities to the city.”

The preparation of the Local Economic and Community Plans (LECP) for Galway City and County are currently underway. The Economic Baseline Study – Summary Report (Draft) for both City and County Councils have been compiled to inform the LECPs. These studies provide an overview of the economic situation for the Council areas and outline the future opportunities in relation to nine industrial sectors. The studies include a number of observations such as: the high level of educational attainment within the area; the presence of a growing and globally recognized creative sector; and the success of the medical device cluster. The studies make a number of recommendations in relation to the development of the economic plan including: developing sectoral specific plans; developing a master brand for Galway; enhancing and developing skills; creation of new models of engagement between sectors; internationalisation of firms; sectoral plans to increase collaboration with third level institutions; and focus on retaining and attracting the best talent.

Industrial Development Policy

The IDA's strategy, "Horizon 2020" (2010) aims to promote Ireland as a global leader in attracting Foreign Direct Investment (FDI) from emerging and established economies. The strategy also outlines the willingness of the IDA to engage with local authorities in terms of locating opportunity sites within their functional areas which lend themselves for use as possible locations for inward investment and economic activity.

This undertaking is coupled with the objective of the IDA to locate 50% of FDI projects outside of Dublin and Cork as previously stated. This places Galway in an advantageous position with the critical mass to support such projects in terms of employment, access to third level educational institutions and transport infrastructure. An example of the attributes which are marketed to potential investors in the Galway Region is illustrated below.



Why Galway for business?

Galway is a University City with a highly educated workforce. A global centre of activity for Medical Technologies & Information and Communications Technologies



Companies in the Area

Galway has developed into a focused global centre of activity for companies such as:



Demographics

359,917 people within a 60km radius

Access

- Excellent road infrastructure** – a 2 hr drive by motorway from Galway to Dublin
- 2 International Airports** within 1 hr drive.
- 1 International Airport** within 2 hr drive.
- Excellent inter-urban rail connections to Dublin and Limerick.**

Infrastructure

Parkmore Business and Technology Park is a c.80 hectare Park off the **M6 Galway to Dublin motorway**. The Park is occupied by many high end **manufacturing and international services clients** and continues to grow.

Talent



In the city of Galway there are two 3rd level Institutions – **National University of Ireland, Galway (NUIG)** and **Galway Mayo Institute of Technology (GMIT)** – with a combined student population of c.22,000.

Research Centres

Applied Research Centres at **NUIG** and **GMIT** include:

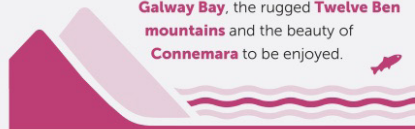
- Insight at NUIG, the Research Centre for Data Analytics
- The Regenerative Medicine Institute (REMEDI)
- SmartBay Galway
- The Galway Medical Device Technology Centre (GMedTech)
- Centre for the Integration of Sustainable Energy Technology

Lifestyle

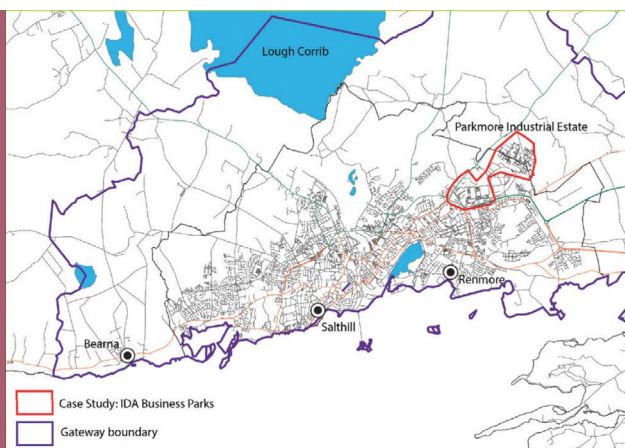


Rich tradition in **literature, culture, arts and music**. The city is renowned for its festivals including the **Oyster, Arts and Galway Horse Racing Festivals**.

Galway Bay, the rugged **Twelve Ben mountains** and the beauty of **Connemara** to be enjoyed.



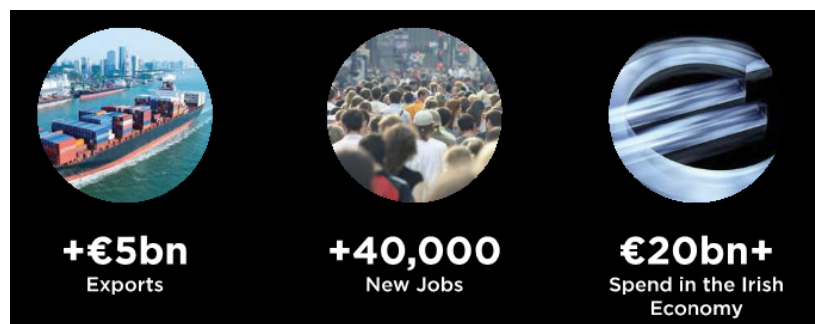
© IDA Ireland 2015



Parkmore Industrial Estate (Source: Western Development Commission, 2013)

The IDA already operates a number of campuses in proximity to the property. The map opposite illustrates the extent of the Parkmore site in red.

Driving Enterprise: Delivery Jobs Strategy to 2016 by Enterprise Ireland details initiatives and actions that will create 40,000 new jobs in Irish companies and increase Irish exports by €5bn by 2016. The vision is that Irish companies, supported by Enterprise Ireland, will be a powerhouse behind economic growth and job creation in Ireland. The strategy identified sectors of the future as; food, manufacturing, software, internationally traded services and construction. The four pillars to drive growth will be 'start', 'innovate', 'scale' and 'anticipate'.



Enterprise Ireland Goals (Source: *Driving Enterprise: Delivery Jobs Strategy to 2016*)

Action Plan for Jobs 2015 has five overarching strategic objectives: to support 100,000 additional jobs by 2016; to get Ireland back to a top-five ranking in international competitiveness; to stimulate the domestic economy and generate employment in locally traded sector; to build an indigenous engine of growth that drives up the export market share of Irish companies; and to build world-class clusters in key sectors of opportunity. The Plan states that Ireland is first in the world for investment incentives and first in the world for availability of labour (taken from the IMD World Competitiveness Year Book 2014). The Plan states that Ireland is home to 9 of the 10 top global pharmaceutical companies and all 10 of the top 10 "born on the internet" companies. The Plan states that the 'Observatory on Europe – Improving European Integration and Competitiveness for Growth' ranks Ireland 5th of the 28 EU Member States in terms of competitiveness, up two places since 2013.

The Plan states that the framework for Regional Enterprise Strategies will be rolled out to all regions. These will include specific actions on the part of Enterprise Ireland, IDA Ireland, the LEOs, Údarás na Gaeltachta and other public bodies in order to promote enterprise growth and job creation. It is stated that the Rural Development Programme 2014-2020 will commence in 2015, following agreement of the Programme with the European Commission. The Plan states that Údarás na Gaeltachta will implement measures to support early stage business development with a particular focus on regional competitive advantage in specific sectors, including cultural tourism, audio-visual and digital technology, marine resources, nice manufacturing, food & beverages and creative language-based services.

Tourism Policy

The Department of Transport, Tourism and Sport has published People, Place and Policy: Growing Tourism to 2025 which sets out the goals of government in relation to tourism. These include that by 2025: revenue from overseas visitors will increase to €5billion in real terms; employment will increase by 50,000 people; and that there will be 10 million visitors to Ireland annually. The policy statement focuses on aspects on 'people', 'place' and 'policy' in order to drive tourism. A Tourism Leadership Group (TLG) is to be established which will then be responsible for creating a Tourism Action Plan.

Failte Ireland has developed and invested in the Wild Atlantic Way project over the past number of years. This initiative comprises a long-distance touring route, stretching along the Atlantic coast from Donegal to Cork. Galway is situated along this route. The aim of the project is to provide an over-arching brand which individual destinations and business can trade collectively with much greater potential visibility in the international marketplace.

The Western Development Commission has identified tourism as a key growth area in the economy of the Western Region. In terms of statistics, the Department of Transport note that overall visits to Ireland in 2013 rose by 7.2% and spending by visitors to Ireland also increased in 2013, with total tourism and travel earnings from overseas visitors growing by 9.4%.

- Between 2011 and 2013, the number of overseas visitors declined in four of the Western Region counties; Donegal had a decline of 2.9%, from 205,000 to 199,000, Mayo experienced a decline of -18.6%, from 268,000 to 218,000, Sligo recorded a decline of 20.3%, from 167,000 to 133,000 and Roscommon recorded a decline of 11,000 (23.9%), from 46,000 to 35,000 in 2013.
- Counties Leitrim, Galway and Clare all experienced an increase in overseas tourist numbers over the period. Clare recorded an increase of 44,000, to 485,000 (+9.9%), Galway experienced an increase of 9.5% to 1,028,000, while Leitrim had an increase of 8,000 (25.8%) to 39,000¹.

The trends above, coupled with the Wild Atlantic Way initiative enhances the already attractive tourism offer available within the region and to the Carnmore property. Access to the Aran Islands by air is from Connemara Airport which is located 30 kilometres from Galway City with an average flight time to aerodromes located on the islands of 10 minutes.

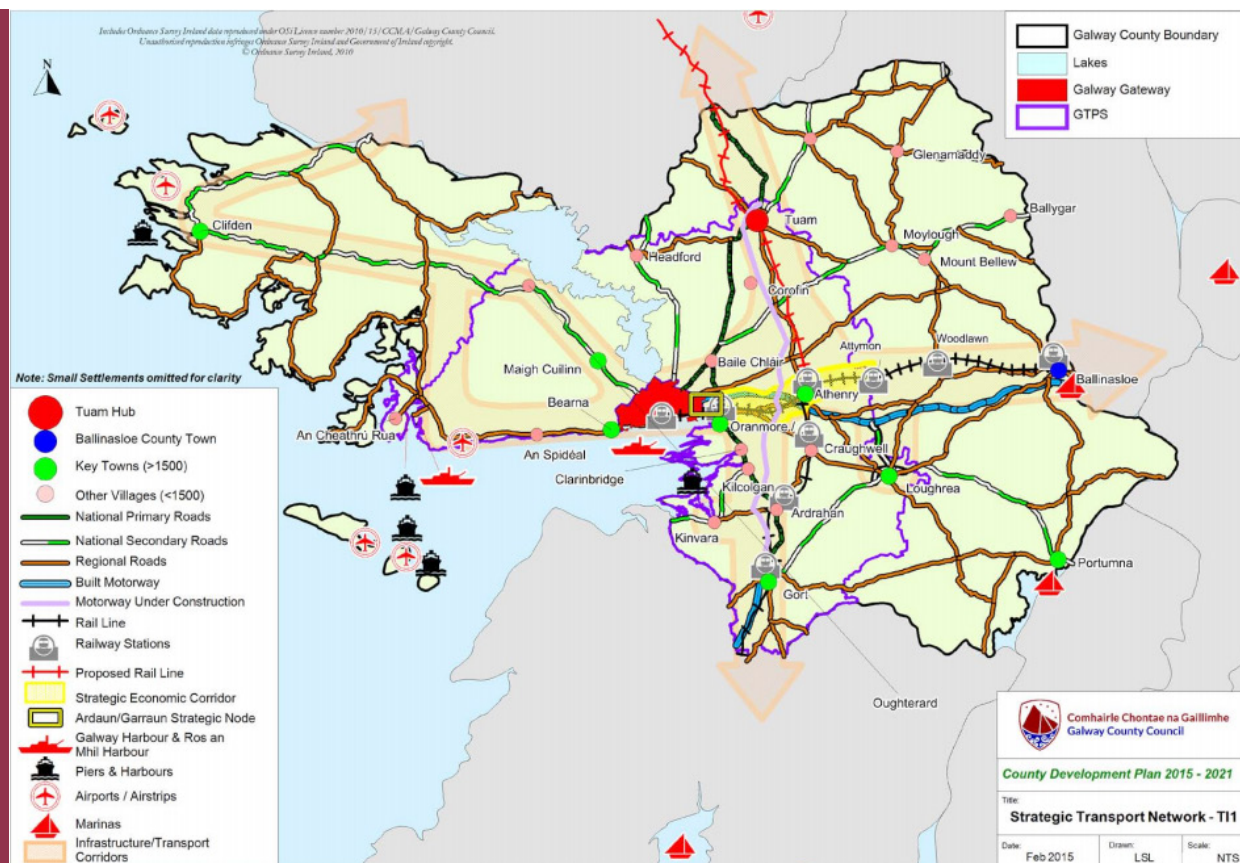
¹Western Development Commission (2015) "Tourism growth...but not everywhere" Available: <http://www.wdc.ie/tourism-growthbut-not-everywhere/>

Transport Policy and the Carnmore Property

While no specific transport policy exists for Carnmore, the property's strategic nature will be enhanced by the development of the M17/18 link between Gort and Tuam. The development of the N6, Galway City bypass will also serve to enhance accessibility to the property. The emerging preferred route corridor is illustrated below. The NSS identifies the M6 national primary route as a strategic linking corridor and the N17/N18 as a strategic radial corridor. The Regional Planning Guidelines for the West Region designates the N/M6 and the N17/18 as the main access routes in the region and the N59, N63, N83 and the N84 as important inter-regional routes. Policy TI 7 – Protection of National Road Network, of the Galway County Development Plan 2015-2021 states that it is a policy to protect the motorway and national road network and national road junctions in line with Government policies to include safeguarding the carrying capacities, operational efficiency, safety and significant investment made in the motorway and national road network within the County including the M6 Dublin to Galway Motorway.



N6 Bypass Emerging Preferred Route Corridor (Source: www.n6galwaycity.ie)



Strategic Transport Network T1 (Source: Galway County Development Plan 2015-2022)

International Best Practice Examples of Airport Regeneration

In order to contextualise the diversity and flexibility of airport lands used for redevelopment, this section outlines a number of international examples where disused/underperforming airports have been adapted and converted to serve a different use for the urban areas and regions in which they are located. While the examples display a diversity of scales and locations it is worthwhile to explore how these former airports were able to repurpose the lands for varying uses.

Pittsburgh International Airport, Pittsburgh, USA

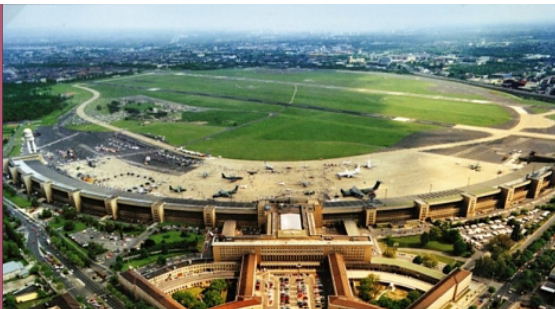
This example involves the reuse of airport infrastructure on foot of the construction of new facilities thereby rendering an older terminal complex redundant. The reuse of the 1950's era terminal complex went through many proposed development options. It was proposed that the complex could be converted into a satellite complex for the Smithsonian Air and Space Museum however the funding required for this to take place could not be raised. The decision to reuse the terminal building site as a mixed use business park occurred in 1995-1996. The site was designed to incorporate flex-offices/warehouses, office and commercial buildings, a business aviation centre and an air cargo ramp. The first three of five buildings were built in 2003. The fourth building was constructed in 2005 and in 2008 Elmhurst built a fifth multi-storey building. Reuse of Pittsburgh's former passenger terminal demonstrates many of the challenges inherent in the renovation and cleanup required to reuse a specialised airport facility, however, the success of the scheme is proven by the plans for its expansion, and outline what can be achieved by reusing key strategic sites.



Sheffield Airport Site

Sheffield Airport, Sheffield, England

This facility closed in 2008. Passenger figures ranged from 46,000 in 1998, 75,000 in 1999, 60,000 in 2000, 33,000 in 2001 and 13,000 in the airport's final year of operation in 2002. The airport subsequently operated privately. An assessment by Sheffield City Council in 2008 indicated that the airport was losing close to £400,000 per year and as such was not in a viable position. Its CAA licence was withdrawn and the terminal buildings were converted into office accommodation. The runway was sold separately and will be developed as a mixed use business park.



Tempelhof Airport Site

Tempelhof Airport, Berlin, Germany

This former international airport closed to air traffic in 2008. The site is now Berlin's largest park, which with a small budget maintains the airport's landscape and buildings. Plans for the reuse of the site as a library and horticulture centre are to be unveiled at the International Garden Show in 2017. In the meantime, the site is open to the public, who can walk the length of the preserved runways and explore the unique landscape of the site.



Hellenikon Airport Site

Hellenikon Airport, Athens, Greece

Hellenikon once served Athens as its only airport. The facility has been closed since 2001 in order to clear the way for a larger and more modern airport for the city in advance of the 2004 Olympic Games. Since that time the site has become derelict with the terminal buildings and runways degrading overtime. A number of aircraft hulks are stored on the site. In 2014 a redevelopment initiative on the part of Lamda Developments was announced. The plan would see the transformation of the site into a sea side resort with two hotels, a kilometre long beach, a marina and an aquarium as well as a metropolitan park.



Edmonton City Centre Airport Site

Edmonton City Centre (Blatchford Field) Airport, Edmonton, Canada

Edmonton City Centre (Blatchford Field) Airport was located within the city of Edmonton, Alberta, Canada. It ceased operating as an airport in 2013. The site had been used for passenger carrying flights however in its final years it was used mainly for chartered flights, flight training, air ambulance and related uses. In 2014, a plan was put forward for the redevelopment of the site. The plan called for a "walkable, transit-oriented and sustainable community" on the 217-hectare space. The plan has provision for 20% affordable housing and the community would be powered by sustainable energy. The budget for the project is \$632 million (£466.95 million).



New Bedford Regional Airport Air Traffic Control Building

New Bedford Regional Airport, New Bedford, Massachusetts

The New Bedford Regional Airport was completed in 1942 as a civilian airport, which was then adapted to serve as a training centre for the United States Army Air Force during the Second World War. After the conflict, ownership of the airport transferred to the New Bedford Municipal Authorities who operated the installation as a commercial airport. While the site was primarily orientated toward providing a passenger based service, it also served as the site of aviation training and education. When the main passenger carrying airline withdrew its services from the facility, the training use became the dominant one due to the co-operation of the municipal authority and Bridgewater State University. The university signed a five year lease in 2009 for the site and its facilities and the training established received certification from the Federal Aviation Authority.

The examples explored in this section serve to highlight the scope and potential that is associated with the redevelopment of airport lands. Some of the airports such as Sheffield and Pittsburgh provide examples of reusing the terminal buildings for office use. In Sheffield the runway lands were sold off separately to be developed as a mixed use business park. Considering the amount of available land at the Carnmore site it is possible that there could be multiple uses for the property and multiple ways to develop it. The former Tempelhof Airport was developed as a park for Berlin. The context of this is quite different to that of Galway, where the property is more remote from an urban area. The former Hellenikon Airport in Greece has a different context to Galway and the same scale of development related to tourism would not be appropriate at Galway. The example of New Bedford Regional Airport in Massachusetts shows how an airport can be repurposed for training in cooperation with a local university.

Some of these uses provide useful examples for Carnmore and resonate with the uses to be explored for the property. However, each location has a unique set of circumstances and the development of each property is dependent on their context in terms of: the infrastructure present on each site; the context and relationship with its environs; the availability of funding for development; and the proactive efforts of municipalities and infrastructure owners in terms of extracting economic, environmental and social benefits from the reuse of the respective sites.

3 ASSESSMENT MECHANISM OF POTENTIAL OPTIONS

Introduction

Policy Considerations

The Strategic Location

International Best Practice

Consultation Outcome

Aviation Use

Process of Option Selection

Summary



Introduction

It is important to set out a clear mechanism through which potential options can be explored and selected. This mechanism comprises: policy considerations; the strategic location, international best practice; and the consultation outcome. These factors all contributed to the process of selection of potential uses that were considered to be potential economically beneficial uses for Carnmore. The undertaking of this potential use selection process then enables the later assessment evaluation.

Policy Considerations

As previously outlined, the policy context for the use of the property is changing as the Value for Money Review of Exchequer Expenditure on the Regional Airports Programme: Department of Transport, Tourism and Sport (2010) no longer supports the continued subsidising of aviation at this location. Within this context a transition to a more productive use must be sought. Both industrial and tourism policy seek to enhance and promote the potential of Galway as a top place to do business and to visit respectively. The IDA has an objective to locate 50% of FDI projects outside of Dublin and Cork. The focus for Galway is to build on the strengths that it currently has such as the fact that it is home to 4 of the top 5 ICT companies – IBM, SAP, Oracle and Cisco. As well as the cluster of medical device companies, with Medtronic and Boston Scientific being the largest employers.

Likewise the Western Development Commission has identified tourism as a key growth area. There is potential to further leverage the benefits of the Wild Atlantic Way. Galway's inbound overseas visitors have increased at a higher rate than the rest of Ireland and opportunities to maximise these increases need to be developed.

The recent Economic Baseline Studies for Galway City and County illustrate the potential of the main economic sectors in Galway. These include the potential of the creative sector. Galway already has a critical mass of creative industries which then further spawns more related industries to establish within the county. As Galway has now been designated as a UNESCO City of Film there is impetus to leverage and develop this designation for the good of the region.

The Strategic Location

As outlined previously the location has a number of advantages in terms of its strategic position in relative proximity to Galway City as well as its ease of access to the regional and national road network. The completion of the M17/18 will also further enhance ease of access to the location. The property itself is large, has existing facilities and has good road access.

Carnmore has been identified as a strategic economic asset and the full potential of the location needs to be leveraged for the benefit of the region. Taking into consideration the strategic location, the proximity of Galway, the regional importance of the location, the focus is to maximise the economic potential of the property.

International Best Practice

As previously explored, there are a number of best practice international examples of airport regeneration. These uses ranged from mixed use business park to tourism and leisure. Some of the examples demonstrated that previous terminal buildings could be repurposed for office use. Other examples included use as a park and for tourism. Upon examination of these examples it is clear that the context for these is quite different to that of Galway. While the scale might be different, however, there could still be some insights to be gained. The examples serve to highlight the scope and potential that is associated with the redevelopment of airport lands. While these examples can be illustrative, each location has a unique set of circumstances and the development of each site is dependent on their context in terms of: the infrastructure present on each site; the context and relationship with its environs; the availability of funding for development; and the proactive efforts of municipalities and infrastructure owners in terms of extracting economic, environmental and social benefits from the reuse of the respective sites.

Consultation Outcome

As part of the process of developing potential uses for the Carnmore property, the needs of potential users, operators and stakeholders at local and regional levels were considered. We consulted with the following key stakeholders among others: Galway City Councillors; Galway County Councillors; National University of Ireland Galway (NUIG); Galway-Mayo Institute of Technology (GMIT); Údarás na Gealtachta;; Galway Film Institute; National Roads Authority (NRA); IBEC West Region; Irish Film Board; American Chamber of Commerce Ireland; Ireland West Airport (Knock); Shannon Airport; Department of Transport, Tourism and Sport; Western Development Commission; Northern and Western Regional Assembly; Galway Chamber of Commerce; Enterprise Ireland; Irish Drift Championship; Danú Media; Carnmore Airport Ltd. (Current Tenant); Schneider IT; and Transition Optical.

The consultation process consisted of a systematic canvassing of opinions by initiating contact in a variety of ways. Written correspondence (letters & emails) were dispatched to the consultees. This action was followed up by phone calls to key persons of interest in order to fully contextualise the perspectives of the organisations concerned with regard to the reuse of the Carnmore property. Where possible, face to face interviews and focus group discussions were conducted in order to fully explore the nuances of each proposal.



The consultations and submissions from these key consultees provided baseline context for the regional development of Galway and the strengths and needs of the region as well as aspirations for the property's future development. The potential range of uses identified were cross checked with those proposed by the consultees which then informed the final selection of potential uses and which will be assessed in the following section. The core aim is to analyse the potential uses for the property while incorporating the suggestions made by the consultees and to determine how the value of the asset can be unlocked. The potential uses were included based on their economic, environmental and social benefits. Uses which failed to give some potential strategy for sustainable growth were not included. We received many suggestions for the potential uses of the property from flight training to film studios. The nature and types of proposed uses advanced during the consultation process are outlined below.

Potential	Consultation Responses
Film Studios	<ul style="list-style-type: none"> The view was expressed that the property could be developed as a hub of creative industries The property would be ideal for TV and film studios Welcome the potential of the use being explored
Renewable Energy Park	<ul style="list-style-type: none"> This use should be explored
Fire & Safety Training Centre	<ul style="list-style-type: none"> This was proposed as a potential use
Aviation Uses	<ul style="list-style-type: none"> There was support for continued aviation general aviation uses at this location There were also opinions that aviation was unsustainable and not required. To bring the airport up to standard would require a large investment There are other potential synergistic uses such as drone testing, light freight, helicopter use
Sports/Leisure	<ul style="list-style-type: none"> The property would be suitable for motor sport events Proposed use of between 15-20 acres at the eastern end of the runway for rugby The use of Carnmore as a sports centre is not viable – it is not feasible for the rugby clubs to move Some sort of recreational or sports facilities might be appropriate Suggestion of an integrated multi-purpose complex which could combine tourism, sport and aviation e.g. 'Tayto Park' theme park The potential for an integrated multi-purpose complex which would combine tourism, sport and aviation was mentioned
FDI	<ul style="list-style-type: none"> There is a shortage of supply There is sufficient capacity in Parkmore & Oranmore. Existing FDI would benefit from continued access to an airport The property could be suited to development of a high technology mixed use business park The property should be developed under Enterprise Ireland or IDA for business development There could be scope for enterprise related activity
Food Park	<ul style="list-style-type: none"> There is a need for a food centre in Galway. The property could be used for a mixed use business park for food related start-ups. There could be scope for a food park
Site for the HSE	<ul style="list-style-type: none"> This was proposed as a potential use
Social Housing	<ul style="list-style-type: none"> This was proposed as a potential use
Conference Venue	<ul style="list-style-type: none"> There is a need for a Conference Venue There is a need for a venue, but recognise that the property is not a city centre location.
Mixed use business park	<ul style="list-style-type: none"> There is a shortage of supply of office space in Galway The property would be most suited for the development of a high technology mixed use business park e.g. Westpark in Shannon The property should be developed under Enterprise Ireland or the IDA for business development Potential for retail park/outlet opportunities
Creative Campus	<ul style="list-style-type: none"> The property could be developed as a hub of creative industries The property would be ideal for TV and film studios There could be scope for film studios use and welcome the potential of the use being explored. The property could be developed into a Creative Zone, working with partners such as GMIT, Udaras Na Gaeltachta, Industry Professionals and NUIG around areas of growth and potential in the creative industries, in Particular Film;
Logistics	<ul style="list-style-type: none"> This use was raised as potentially appropriate for the property

Aviation Use

The authors of this study also considered the potential for future aviation uses for this location. These were considered in line with current demand (both passenger and freight), alternative service availability and the availability of other forms of transport. As previously referred to aviation uses were found not to be viable in the Value for Money Review of Exchequer Expenditure on the Regional Airports Programme: Department of Transport, Tourism and Sport (2010) Report.

During the course of this study it became apparent that aviation uses are not commercially viable in the context of providing scheduled services for either passengers or freight. This is particularly true given the proximity of two nearby international airports, namely Shannon and Ireland West at Knock, Co Mayo. It is also apparent that there has been functional obsolescence of some of the aviation facilities and therefore a significant capital programme would be required in order to restore this facility to an operating capacity.

A further factor to be considered is the enhancements which have been made in the national primary road network and the considerable positive effects that this has had on travel and transport possibilities. These enhanced facilities further mitigate against a possible commercial future for aviation at this location. Taking into consideration above, aviation uses were not considered further as part of this study.

Process of Option Selection

The assessment mechanism comprising of: policy considerations; the strategic location; international best practice; and the consultation outcome enabled examination of the options for the property's reuse. Due to the terms of the study brief, however, it is necessary to screen the proposals advanced in terms of assessing their capacity to fully capitalise on the strategic nature of the property and the potential return which can be extracted from the use of the property as a component of the City and County's "economic engine". Having regard to the above, the uses were assessed as per the below table. They were broadly grouped into 'low intensity' and 'intensive use'. The main criterion for selection is the potential of the use to fully leverage the economic potential of the property.

Selection Process

Low Intensity Use	Film Studios	Advanced	It was considered that this use could be worthy of consideration in the context of the UNESCO City of Film designation and the strength of the creative sector in the region. This type of development could be a strategic use for the region, something that would build on existing strengths.
	Renewable Energy Park	Advanced	This was considered as a potential option as this would meet current sustainability objectives and could be a unique and sustainable option for the County.
	Sports/Leisure	Advanced	There may be potential to explore this use, however there would need to be a significant economic component as on their own these type of uses may not unlock the full economic potential of the property.
	Fire & Safety Training Centre	Not Advanced	While the property may be opportune for this type of use on an ad hoc short term basis, it is considered that the reuse of the property as a dedicated Fire and Safety Training centre, given existing training facilities at the disposal of emergency service personnel, may not be warranted.
Intensive Use	Development of FDI Cluster	Advanced	This use will be considered further as it would be appropriate location and may have the potential to attract jobs to the region.
	Food Park	Advanced	This use will be considered further as it would provide an opportunity to help build this industry within the region.
	Site for HSE	Not Advanced	With regard to the identified investment priorities in the "West / North West Hospitals Group Service Plan" (2014), the capital costs required with relocating and redeveloping the Carnmore property, as well as the public transport services which would be required to serve the property, it was concluded that this proposal would not be advanced for further study.
	Conference Venue	Not Advanced	This proposal was assessed with regard to Galway's existing offer in the area of conference and large capacity event venues and it was concluded that this type of development outside of the City proper and in the absence of transport links and facilities may not be a suitable location for this type of venue.
	Social Housing	Not Advanced	Due to the lack of public transport connections and necessary services in the vicinity of the property this was not taken forward.
	Mixed use business park	Advanced	Both industrial policy and the consultation process identified the potential for creation of further business opportunities for Galway as a key priority. The ease of access to the location also meant that this location could be considered suitable for this use.
	Creative Campus	Advanced	Building on the existing success of the creative sector in Galway and the identification of this property as a possible suitable location this use was advanced for further consideration. This type of development could be a strategic use for the region, something that would build on existing strengths.
	Logistics	Advanced	Considering the scale and strategic location of the property with good road access the development of a logistics facility could be a good use of the property.

Under each of the headings identified (low intensity use and intensive use) a number of options are discussed in more detail in the following section. The options below were chosen as the most likely to make best use of the property as well as being uses which could possibly be accommodated successfully. The below uses were chosen based on the outcome of the assessment as outlined above which discounted some uses due to the unsuitability of the use at that location (e.g. social housing and conference venue for instance where lack of appropriate public transport links and services rule out these uses at this location).

Low Intensity Use

- Film Studios
- Renewable Energy Park
- Sports/Leisure

Intensive Use

- Food Park
- Foreign Direct Investment Cluster
- Mixed use business park
- Creative Campus
- Logistics

Summary

Taking on board the policy considerations, the strategic location, the international best practice and the outcome of the consultation, the proposals that were advanced reflected a broad range of diverse uses for the property. The proposed uses that were suggested were assessed against their merits and against the scope of the allotted brief in terms of securing the most effective return for Galway as an economic asset. Some uses were considered not to represent an optimal use of the property in terms of best use of a strategic property to bring economic return or were not likely to be suitable to the location and these were screened out of the evaluation process. The proposals outlined previously were deemed to align with the above so they have been progressed for assessment in the following section.



4 EVALUATION OF POTENTIAL OPTIONS

Analysis Methodology

Assessment Summary

Assessment Analysis

**Outcome of Analysis –
Potential Uses**

Analysis Methodology

Having gone through the assessment mechanism to select potential options, these uses are now assessed against a number of criteria that may be of importance to the Councils to aid their decision making.

By using the groupings devised as a result of the assessment mechanism, this section assesses the various options against a number of possible criteria of importance in order to provide discussion points around the options and to highlight what may be of relevance to those options.

The uses are grouped into the following categories:

- Low Intensity Use:
- Intensive Use:

The "**Low Intensity Use**" option entails some adaptation to the facilities at the property in order to serve a new, distinct function. These uses are designed to capitalise on opportunities in established and emerging sectors by harnessing the potential of the property in terms of its facilities and place within the region.

The "**Intensive Use**" option represents the uses which would require a comprehensive redevelopment of the property in order to make way for a range of options which would enhance the social and economic qualities of Galway City and County.

Some of these uses may be able to coincide with uses from the other categories and may run in parallel or one use may facilitate the future development of another.

Each use is highlighted as possible within a short, medium or long-term capacity.

Each proposed use is assessed against a number of spatial, economic, social and environmental criteria. A traffic light system is used to indicate how the potential uses measure against these criteria.

It should be noted that no cost-benefit analysis has been conducted on the options explored in this section.

At this time, no study of the existing services on the property and their carrying capacity has been conducted.

Traffic analysis in order to determine the carrying capacity of the roads for potential future uses has not been undertaken to ascertain the suitability of the property for varying levels of use.

Assessment Summary

Following on from the previous assessment which examined potential options in relation to the policy context, the strategic location, best international practice and the consultation exercise the below tables assess these potential uses against a number of criteria. These are factors which are of importance to the analysis of benefits in relation to the future use of the property.

Low Intensity Use		Short Term (Within 1 Yr)	Medium Term (3 to 5 Yrs)	Long Term (5 Yrs+)	Economic			Social	Environment	Spatial	
					Competing Uses Within Region	Potential Interest	Beneficial to Tourism	Importance to the Region	Environment Benefit	Surface Access	Strategic Location
	Conversion to Film Studios										
	Conversion into a Renewable Energy Park										
	Sports/Leisure										

Intensive Use		Short Term (Within 1 Yr)	Medium Term (3 to 5 Yrs)	Long Term (5 Yrs+)	Economic			Social	Environment	Spatial	
					Competing Uses Within Region	Potential Interest	Beneficial to Tourism	Importance to the Region	Environment Benefit	Surface Access	Strategic Location
	Food Park										
	Development of and FDI Cluster										
	Mixed Use business park										
	Creative Campus										
	Logistics										

Assessment Analysis

The above tables illustrate the potential economic, social, environmental and spatial factors for consideration in relation to the various options brought forward.

In terms of the low intensity uses the conversion to film studios has many positive outcomes. There are no competing uses within the Region at present, however a new studio is due to open in Limerick in 2016 (Troy Studios within the former Dell Factory in Plassey). The only other studios of scale are Ardmore in Wicklow and Titanic Studios, Belfast. This use also scores highly in relation to the interest generated by it which can be an indicator for likely backing of the project and also shows the importance it may have for the region. The strategic location and surface access would also be important for this use.

The conversion of the property for renewable energy park performs well in terms of not having a competitor in terms of the scale this property could provide. A solar array on this property could go a long way to reaching the energy needs of the population of Galway and therefore scores highly in terms of environmental criteria. This use however would have no direct benefit to tourism. It also does not require a strategic location.

In relation to the more intensive uses food park has mixed results. This is a use that could benefit from a strategic location and good surface access. However in terms of importance to the region and the potential interest this has not come out clearly from the analysis. Likewise the development of an FDI cluster has mixed results especially in terms of the potential for this use as there are competing uses namely two other existing IDA parks in relative proximity. Again, this use would benefit from a strategic location and good surface access. Similarly a mixed use business park has largely the same conclusions.

In relation to a creative campus use, this scores well. This is largely due to the fact that there is no competing use. There is not one hub location for these uses which provides a critical mass of industries creating synergies at one site. This is the type of use that would capitalise on the reputation of the region in this sector.

Outcome of Analysis – Potential Uses

The previous section outlined a number of different uses for the property. These were grouped into low intensity and intensive use. In this section these uses were assessed against a number of criteria which could be used to help identify uses which might be of importance to the Region. Following from the above assessment it is clear that there are a number of uses which would meet more of the criteria for a positive assessment in terms of a use that would best leverage the potential of the property.

While uses have been discussed individually there may be scope that some uses could coincide in order to get maximum value for the property. In terms of low intensity uses the conversion to film studios scored highly. Galway could leverage its reputation in this regard and build on the Galway UNESCO City of Film designation. Developing studios at this location would extend Galway's capacity in the film and media industries. The existing hangars may be suitable studios in the short-term (however no building surveys have been completed). With a more modest investment (than for an intensive use) the property may

be capable of adaptation, however further investment over time could more fully utilise the property and develop it to become a cluster of synergistic uses to develop a real hub for the industry in Galway and for Ireland. While this on its own might be low intensity there could be scope to partially utilise the property for other synergistic uses such as the creative campus concept.

While there are obvious environmental benefits to the renewable energy park concept, it not a use that requires a strategic location and is not therefore a use that would be advocated for the property.

In terms of more intensive uses an FDI Cluster had been discussed. While certain parties saw the requirement for this use, others did not foresee a need for this use at present as there are two existing parks with capacity, namely Parkmore and Oranmore. While the property does have a strategic location, the requirement to provide such a use in light of capacity in nearby sites would need to be justified and potential tenants sought.

Similarly a mixed use business park and a food park could have potential and would benefit from a strategic location. However, there are already competing uses or elements of them that would mean that the property would not be providing something new to the region.

In relation to the creative campus, this is a use that, similarly to the film studios use, would leverage the potential of the existing strong creative sector in Galway. It is a use that has the potential to offer a unique selling point for Galway.

5 THE WAY FORWARD

Factors Critical to Making
an Informed Decision

Understanding the Critical
Factors of Importance

Moving from Short to
Medium and Long Term
Scenarios

Development Context and
Development Mechanism

The Way Forward

Factors Critical to Making an Informed Decision

The Councils must be in a position to make informed decisions with regard to the future use of the property. As has been previously outlined in this study a number of uses have been discussed at a high level and are concepts, not proposals. The Councils need to embark on a path to fully understand the potential of the property in terms of what the market wants as well as what the property can support.

Understanding the Critical Factors of Importance

The study provides an assessment summary of potential various uses against factors that may be of importance for the future development of the property. However the Councils may decide that there are other factors that are of equal or more importance. For instance, whether it is critical that the property stays in public ownership. Or whether it is critical that there is high direct job creation versus indirect creation and general economic benefits. These factors could further inform the matrix with weightings such as for tender proposals that would allow an evaluation of various options should they be presented.

These are questions and issues that can be explored. The above is based on the assumption that immediate monetary gain is not the only or primary factor of importance in relation to the future development of the property. Where immediate value is required to be unlocked the market would determine this.

Moving from Short to Medium and Long Term Scenarios

A number of options for low intensity uses were identified and were assessed against policy, the strategic location, best international practice and consultation considerations. It may be that some level of aviation related use could potentially continue while transitioning to these low intensity alternative uses. The low intensity uses have the benefit that with more limited investment the property could possibly be in more productive use in a shorter time scale relative to a more intensive use.

The intensive uses identified would have a longer lead time and would involve a larger level of investment prior to utilisation of the property. It may be that while a decision to go for an intensive use may be taken immediately that the aviation and/or low intensity use could be facilitated and the property productively used in the meantime.

Development Context and Development Mechanism

An understanding of the context for future development is required in relation to other potential competing developments as well as the interest of developers and other parties to provide particular uses (e.g. IDA parks currently have sufficient capacity).

The Councils will also need to consider how they propose to bring forward the development, the research, marketing and funding requirements and what development mechanism (e.g. joint venture) may be used to realise the project.

The Way Forward

As outlined above a number of issues require to be explored in order to make informed decisions regarding the future use of the property. Previous sections explored a number of potential uses for the property. The outcome of the analysis is that there are potential low intensity and high intensity uses that could unlock the strategic potential of the property. All options for future reuse of the property should also consider what existing sites and zoning are already available within Galway and the region and how they would compare to this property.

One element of making informed decisions is the requirement for more information in relation to the property. The following information will be needed:

- A full appraisal of the services available at the property and the costs associated with providing them otherwise;
- An understanding of the road network capacity to cater for additional peak hour commuting, (although this may be contra-flow to commuting to Galway City);
- An understanding of the economic climate and the appetite to develop the land.

Conclusions and Recommendations

It is recommended that expressions of interest are sought from interested parties for the future development of this property. In taking this step the local authorities should be mindful of the socio-economic return available over the short, medium and long terms.

Given the extensive nature of the property in question the authors are of the opinion that allowance could be made for a number of activities since no single use would require the large area currently available at this location.

It is, therefore, specifically recommended that expressions of interest should be sought from parties interested in the establishment of a creative campus centred on the promotion/enhancement of the film industry and also the development of a complimentary mixed use business park. It should be noted that these varying uses scored highly on the overall evaluation analysis and would provide an evidence-based proposition for Galway.

An Expression of Interest process and/or a coordinated effort between agencies and the various industries should be considered i.e. some coordinated effort by those within the creative sector is required in order to move forward as a mixed use facility that includes the film, creative arts, food and technology sector. Consideration should be given to establishing a 'creative taskforce' to examine this approach.

In terms of the potential way forward, the economic benefits of the various options and the critical requirements of the Councils such as socio-economic returns, the delivery of jobs, tourism potential or other criteria (to be determined) may also require evaluation.