



# GALWAY 2040

Towards a Shared Future

## Live, visit & contribute

As a 500 year-old medieval city Galway has evolved through many diverse challenges. Its evolution to become a walking, cycling and sustainable city is based on the principles of community and wellbeing for its citizens. The city is designed with a public transport system where people can live, work and play with ease in healthy, safe and visually attractive urban spaces. Timeless architecture, social and community amenities, theatres, venues and parks that both serve and delight continue to be the lifeblood of Galway's urban soul.

## Design & Creative Fusion

Creativity and technical excellence combines with entrepreneurial spirit and drives growth in many sectors. We are already seeing a fusion of these concepts in diverse sectors such as medtech, film and ICT. The freedom and openness of the creative fused with the thinking and problem solving ability of the designer ignites commercial value in both large and small enterprises. This distinctive Galway combination fuels high-value inspired products and services.

## Learning through innovation and resourcefulness

The ongoing revolution in learning is triggering people to reimagine education with focus on their own unique potential for innovation and resourcefulness, which is enhanced by design and creativity. This process starts in childhood with teachers and parents recognising, encouraging and growing the creative potential of our children. The concept of lifelong learning is an intrinsic element of working life. The opportunity for Galway is to intertwine learning in a work-learn ecosystem based on collaboration and community principles.

## Arts, Culture & Media

Galway's international reputation for Arts & Culture is built on a highly successful range of events, festivals and achievements. Galway is a designated UNESCO City of Film and our film & media activity is increasing every year. As European Capital of Culture 2020, the future holds no limits for our unique Galway cultural community. Galway's position as an international cultural icon and distinctive cultural source and destination continues to develop.

## Developing Sport and Leisure as an industry

Sport and leisure in Galway is both business and pleasure and both are an integral part of our events and festivals, economic, social and cultural life, accounting for 2% of total employment nationally. The integration of manmade and natural waterfront and water-based amenities plays a huge part in Galway life and continues to develop, as do the amenities on land. Sports and leisure venues and destinations sit comfortably into our communities and our beautiful landscape, demonstrating deep sustainable relationships.

## Evolving Food for Wellbeing

Galway is a county with a ripe land and rich marine which feeds nearly 10 times its population. As a European Region of Gastronomy this provides a platform for highlighting distinctive food cultures, educating for better health, sustainability, stimulating gastronomic innovation and supporting our SMEs. Creating stronger links between sustainable tourism, gastronomy and culture leads to a convergence between food and sciences resulting in the development of foods targeted at the treatment of chronic health conditions.

## Making more of Green Energy & Natural Resources

Galway, using the power of the Atlantic, becomes the future in the development of green energy sources of wind, wave, tidal and solar. Their predicted capacity outstrips current national demand by 10 times. The western region will attract investment from the high users of energy (technology and ICT) as the producer of sustainable and cost effective low green carbon energy. Galway is acknowledged as a region which values its environment.

## Championing Care & Health for every member of our society

Galway city and county uses the community as the basis for the primary source of care and sanctuary and continues to promote an active life style within its communities. It advances the primary care system on an inclusive basis to enable all people to have a useful life, regardless of mental or physical limitations. No one gets lost or left behind. Galway achieves the title of having the highest life expectancy in Ireland.

## The Foundry

The continued development of a network of Creative Enterprise centres, with strong deep roots into both the Creative Hub and community, fits perfectly as part of the regional Innovation Network and Foundry concept. Functioning networks of practice, together with access to international markets, are critical to the continued growth of all sectors. The ability to create enterprise and employment from the entrepreneurial and innovative capacity of people sees 35,000 additional jobs in the city and county.

## Growing up with the IoT revolution

A 'smart' connected community. Galway's population of digital 'natives' live and work seamlessly in a world of technology, automation and robots. In an age connected through the Internet of Things, our children naturally understand the virtual and the physical world. Safety, health and active communities are the norm in the smart environment. In Galway the smart city is also the social city, where technology enables people to work smart and live life to the full.

## Creating an internationally acclaimed Medical Campus

Galway builds on its experience with medical science technologies and develops Galway to become a city where medical science technology development co-exists with its application in the acute and chronic sectors, providing health care at the highest international level. The bringing together of physicians, researchers and industry ensures that the medical sector becomes the primary driver of new technologies stretching the limits of both bio and nano science which links academic research with future industry growth.

## Being the marine centre of the NEW map of Ireland

A maritime city with a strong history as a significant transatlantic and trading port. Galway, the home port for research vessels, becomes a primary producer of marine based technologies and a base for exploration and mining with the development of off-shore platforms. This drives Galway to become an international centre for marine based finance for the Atlantic Arc. The opening of the deep water port sees Galway being the only cruise port in the world within walking distance of a medieval city.



**Carey Cup  
held in Galway Bay  
Golf Resort**

**'Galway School of Design  
& Creative Arts'  
at GMIT Wellpark campus;  
Virtual Reality Innovation  
Centre**

**Creation of a  
dedicated food market  
in Galway & establishment  
of a food hub in Athenry -  
regional hub of the artisan  
market network**

**Galway City is 1st  
in Ireland for science,  
technology, engineering  
and mathematic-related  
(STEM) graduates in the  
labour force and 2nd  
in terms of third-level  
graduates**



**The Portershed expands  
Regional accelerator program for  
startups in Galway  
commences**

**'Storytelling  
Academy'  
at GMIT**

<b>2017</b>	
<b>Galway Population</b>	
City	100,000
County	258,000
<b>GVA - In Euro</b>	<b>€37,000</b>

**Development of  
'Creative Teachers'  
programme for Child and  
Youth Educators**



**European Region  
of Gastronomy**



**Film Studio and Media/  
Creative campus at the  
Carnmore Airport site**

**TV Summit  
Festival**

**UNESCO 'Creative Cities'  
International Conference on  
'Creativity &  
Sustainable Development'**



**Physicians, researchers and  
industry agree to create and  
fund a large research centre  
as part of the development  
of an acute  
hospital**

Establishment of a world-class med-tech accelerator program in the heart of the city

Centre of Excellence for TV Production & Screen Talent Europe Seminar



The Galway Transit Authority activates a mass transport system plan incorporating 5 defined mass transit routes and an inner city circle

GMIT and NUIG together with Irish sporting associations design a new regional multi-sport centre for Galway



Development of 'Creative Arts and Health & Wellness' related education programmes at GMIT and NUIG

Integration of 'Design & Creative Arts' Education with Enterprise Activation within GMIT

Development of  
'Creative Process and  
Sustainability'  
related education  
programmes  
at GMIT and NUIG'



Establishment of Schools  
'Creative Week' Festival,  
linking Design and  
Creative Arts with careers,  
entrepreneurship,  
and innovation

# Gaillimh 2020 Galway

European Capital of Culture 2020



Innovation district further  
expands with the  
creation of  
250 jobs

Establishment of an  
Academy of Design and Creation  
funded by the FDI community  
to promote research &  
development driven by the  
collaboration between the  
Creative and Design sectors



Galway citizens' Urban  
Design Master Plan



**World Class  
Rugby stadium**

**The first urban centre  
to deliver distributed working  
to reduce the carbon  
footprint for 20% of the  
working population**

**Integration of  
Creative Community  
Health workers  
in services, in disability,  
mental health, terminal  
illness family support,  
and related areas**



**Marine innovation and  
research centre  
established to drive Galway as  
the national ocean  
research hub**





**International centre for care and disability established in Clarenbridge**

**UNESCO  
'Creative Cities'  
Annual International  
Congress**



**Full commissioning of  
the wind energy site**

**Galway develops an  
agri and marine economic  
food institute  
to support an accelerated  
growth of the industry  
into new markets and the  
redesign of the value chain  
to sustain the primary  
producer**



**Galway (city and county)  
producing enough  
renewable energy to  
meet its needs**

**Establishment of a Public/Private  
translational campus  
as part of the medical and  
technology district**

**Establishment of  
major animation studio  
in Galway creating  
up to 400 jobs**



**First phase of the  
new port complete**



Host matches in the  
2023 Rugby World cup

Galway becomes a  
European centre for  
research and technology  
development in the  
marine energy  
sector



Full cycle network  
Ring road completed

Galway technology based  
industries expand rapidly due to  
(i) local research and innovation  
and (ii) having the fastest  
growing pipeline of start-up  
companies in Ireland

**Creative start-ups**  
in design, film, animation, and  
games by returning participants  
in GMIT and NUIG International  
programmes exceeds 100

Marine Craft & Interiors  
Sector, Design & Build,  
employment exceeds 300

## 2023

Galway Population

City 150,000

County 300,000

GVA - In Euro €44,000



High density residential developments in city

Creative sector supports 30% of the increase in employment

First 3rd level institute to successfully demonstrate the success of accredited learning through innovation and resourcefulness in a distributed city and regional campus with special areas of focus that support the growth of the region

Curated Irish Language & Culture Interpretative Centre



International campus for ocean technology supporting the exploration & development of the Atlantic marine resources



**The mass transit routes are fully in operation along with all key inter-connecting points**

**First region in Europe to establish a living lab citizen trust to enable the community to be rewarded for its contribution**



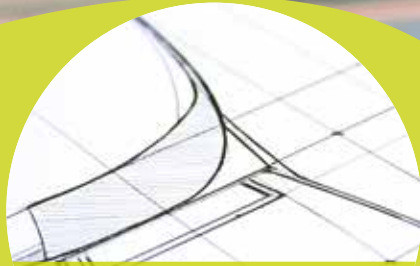
**First connected wave farm**

**Key wellbeing indicators continue to turn positive and as a result of novel new social health programs and the development of sanctuary spaces within the city, there are zero homeless on the streets of Galway and suicide rates have halved**

**Portershed development has extended with the new innovation district in Galway employing in excess of 5,000**

**World class marina opened, Largest 'Port of Call' for cruise liners within walking distance of a medieval city**

**Integrated public transit  
for major city zones**



**Double the talent base of  
combined STEM Graduates  
& Artists in Galway**

**Food campus fully developed on a  
scale similar to the success achieved  
in dairy (Moorpark) with engagement  
from Agricultural Colleges, Teagasc and  
major food producers to deliver food  
innovation leading to increased market  
share for Irish producers**

**New applied education  
system becomes  
central to an innovation  
ecosystem attracting  
significant FDI investment**



**Mid-budget (10m - €50m)  
Irish-International  
productions start in  
Galway Film Studios**



**Acute hospital opened in  
Merlin Park in 2026**



**A walkable city**

The convergence of  
(i) the Film and Arts,  
(ii) Social Media with the  
(iii) Health and Services sectors  
causes an overall rapid growth  
across those sectors resulting in  
Galway becoming an international  
centre for new and emerging  
service technologies



**Opening of the  
Waterways**

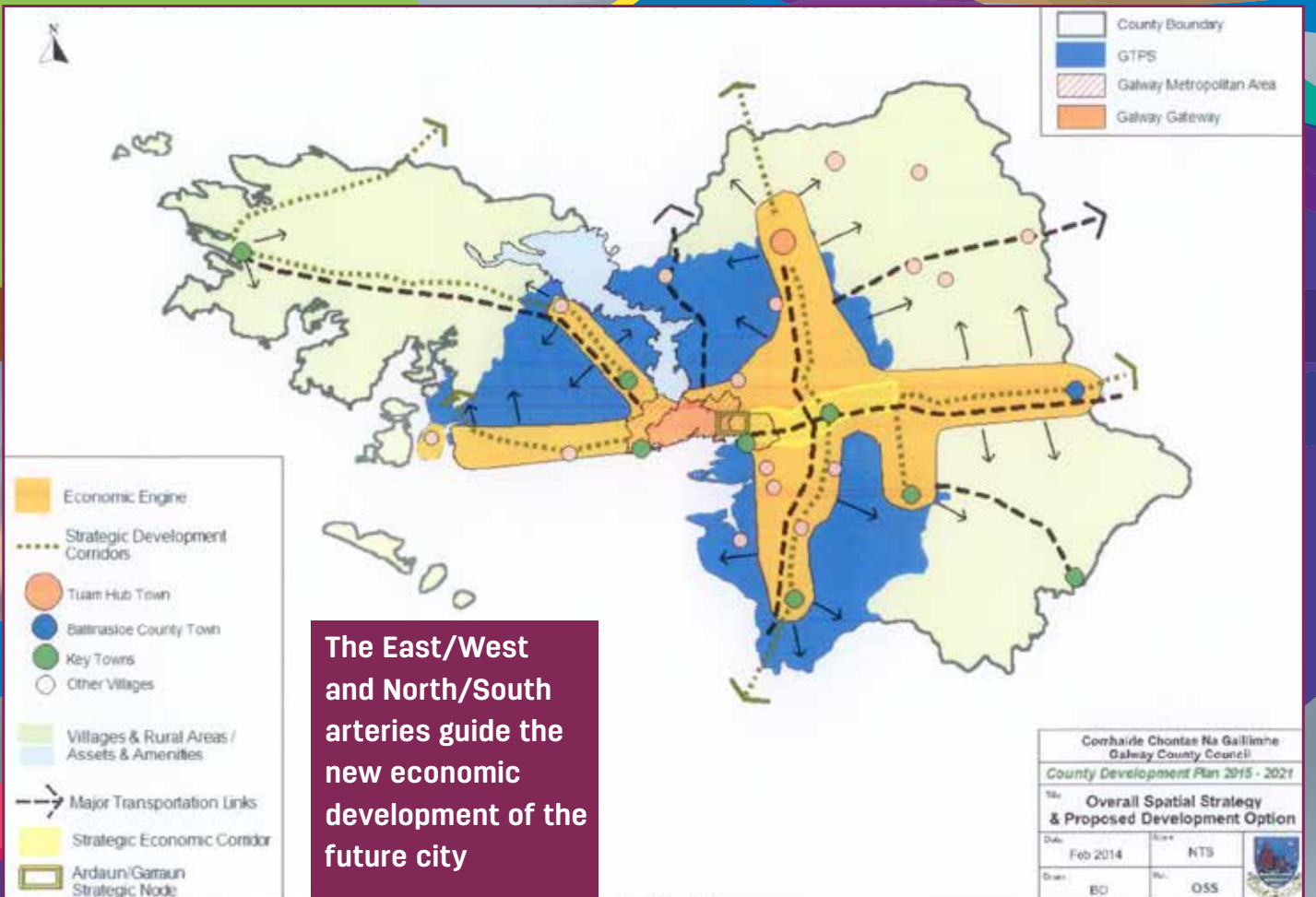
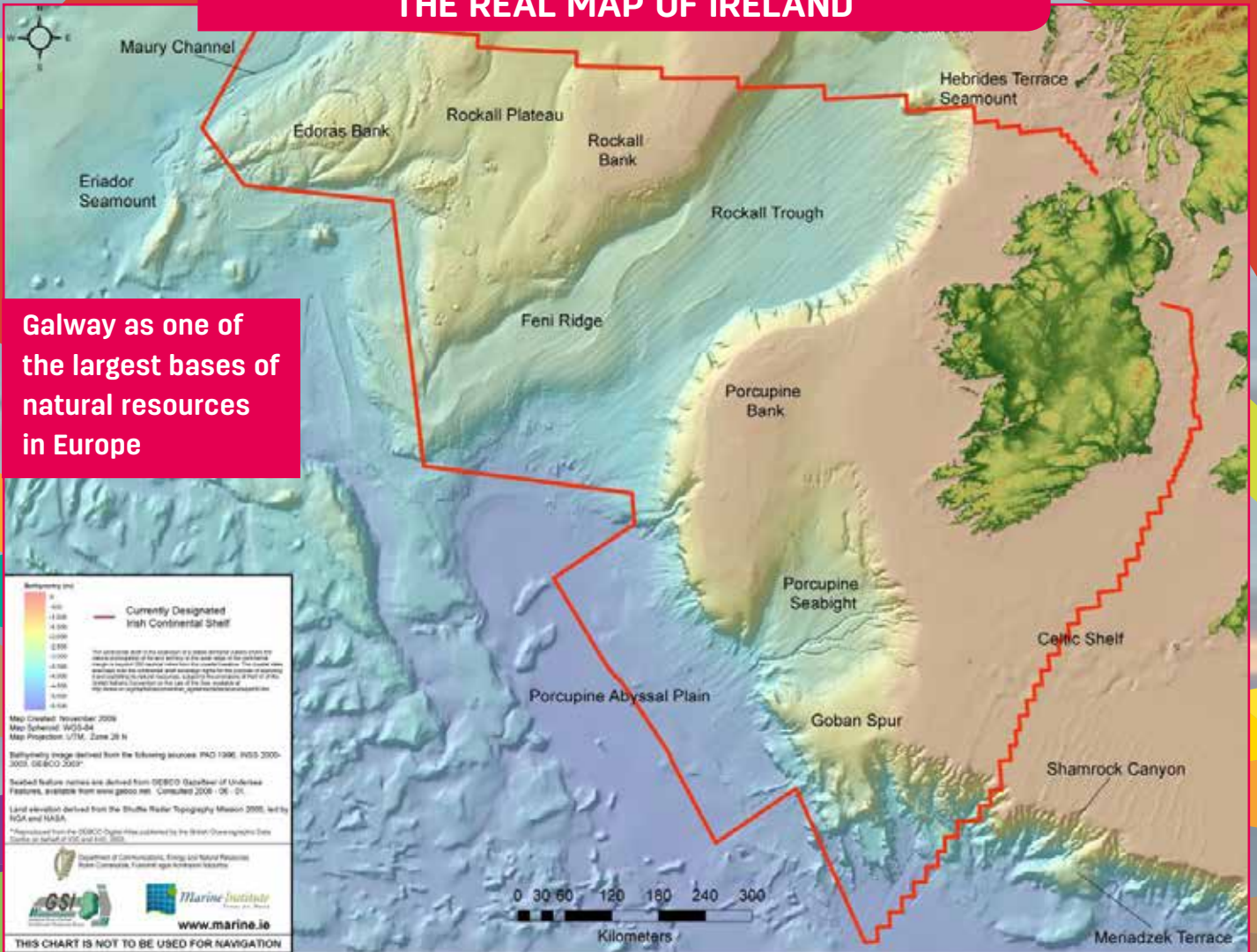
Industry expansion  
programme to build out  
a large shared capacity  
between industry and the  
hospital which includes the  
bio-innovate centres



**Galway becomes the Irish  
marketing centre for the  
promotion of agri and  
marine foods  
internationally**

# THE REAL MAP OF IRELAND

Galway as one of the largest bases of natural resources in Europe



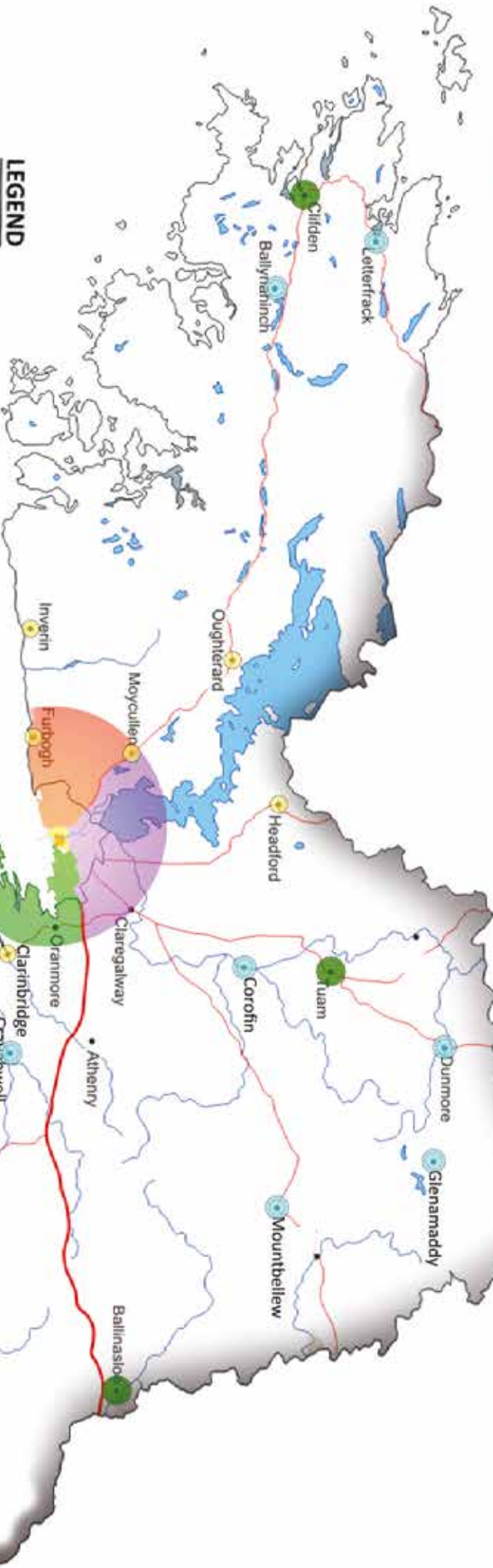
The East/West and North/South arteries guide the new economic development of the future city



# Galway County Boundary Map

## General Legend

-  County Boundary
-  Lakes



## LEGEND

-  Inter-County Economic Nodes
-  Tertiary Inter-County Nodes
-  City Dependant Nodes
-  Existing City Conurbation
-  Galway City North
-  Galway City East
-  Galway City West

Galway's future development will be inclusive of the county to the West, East and North of the existing city.

The success of the Wild Atlantic Way, and the creation of the Burren and Connemara loops, has increased the number of tourists which has doubled their economic contribution to the city since the year of culture



Development of a virtual medieval environment mapped to Galway's medieval city and physical performance and exhibition spaces

Productivity growth within the R&D and STEM led sector is driving higher salaries and greater high value employment in the county

Galway, a city of the marine, becomes the marine commercial and financial centre for Ireland

Redesign of the city which has green and blue space within walking distance for all citizens resulting in a healthy lifestyle



FDI companies employ in excess of 500 'artists in residence' within their design teams

**Greenway From Spiddal to Kinvara, around the Bay & The first phase of the new urban design is completed**

**Further strengthening of the residential and recreational design of the city prioritises inclusion and diversity**

**25% increase in R&D and STEM-worker intensive advanced industries. This sector has steadily increased its productivity and is now, on average, more than twice as productive as non-advanced industries**


**The economic base is strengthened as the innovation district extends from NUIG to GMIT integrating research with the development of IP**




**Municipal Multi-sport Complex Stadium for Feature Events**

Mass transit system fully integrated with both the East/West & North/South public transport corridors

Independent animation and games companies employment reaches 1,000



Athenry to Ceannt station is upgraded to 4 tracks and becomes the backbone of the public transport system facilitating a high speed rail network between Galway and Dublin



Heritage & Cultural centre established on Lough Corrib and Galway waterways are identified in Europe as a leading centre for sustainable angling



The artisan market expands within the region leading to exchanges with a growing number of food networks

Most connected regional peripheral economy (marine and land based) in Europe

European centre for international technical partnerships in the marine



Within the city regeneration plan, priority is given to affordable living space for citizens who live and contribute within the city

The sports complex now includes a world class Conference Centre



Galway recognised as having the highest number of start-ups which are specifically seeded through the education system and are commercialising the inherent IP

Further expansion of the medical and technology district through the addition of a medical robotics campus

As a result of the success of the innovation district, Galway has attracted 5 of the top international VC companies

Evolution of the sanctuary spaces to ensure they are properly structured to empower people to renew their lives and contribute effectively to society



Concert Hall built in Galway Bay



Through the provision of all weather pavilions, the Race Course doubles its contribution to the City



Galway is nominated the Green Capital of Europe in 2032

Creating an internationally acclaimed Medical and Technology Centre

Fastest growth of diverse marine and agri food start-up companies sharing a common research, innovation and financial infrastructure

**2032**

Galway Population  
City 200,000  
County 400,000

GVA - In Euro €57,000



**Galway technology sector evolves to include advanced IoT and robotics**

**First breakthrough in medical technology has happened with the direct support of the academy of design and creation**



**Network of regional artisan food production continues to expand**



Convergence between food science and pharmaceutical/bio sciences leads to the early development of foods targeted at the international treatment of a selection of chronic health conditions

The Galway innovation district now fully includes regional and county town centres making it the most integrated, active and effective innovation network in Europe



Ireland's transport network powered by green energy from the West. The Western Pilot first phase.



Galway becomes a leading European centre for triathlons





**Design, Creativity and  
Technology Festival – with  
immersive synchronous  
Virtual Reality  
experience**

**The innovation district has  
successfully rejuvenated  
and grown both the city  
and county and has  
contributed to 40% of  
the growth**

**Galway has the  
highest number of  
adult learners  
in the workforce in  
continuous education  
and development**

**Private joint venture  
between the acute  
hospital and industry  
to support medical  
technology trials**



**Leading twin city  
for food**



**Completion of the Porcupine Shelf  
Atlantic Ocean Observatory as an  
extension of the Marine Atlantic  
Laboratory within  
Galway Bay**

Mass transit upgrades  
in the city

Galway and the western  
region leads the European  
periphery regions in the  
transformation of work and  
accommodates  
**robotics and  
technology**  
**in the workforce**  
and meets the social need for  
sustainable and flexible  
employment



Re-opening of the rail link to (i)  
Connemara and Clifden and (ii) West  
Clare, providing a steam train  
heritage experience



As a Global City of Innovation the  
Academy hosts an international  
convention which focuses on the unique  
and novel contribution of the artist/  
innovator to the rapidly  
evolving technology  
sectors

Robotics and IoT support the  
accelerated development of our  
natural resources and  
the marine



**Independent animation and games companies employment reaches 3,000**



**Ireland's first multi-purpose deep sea platform off the Aran Islands in 2036**

**Galway medical science, engineering and technology campus heralds the completion of the first phase of the new city development program having integrated Transport, Residential and Recreational**

**Profile of Galway City & County population density and diversity driven by the positive migration of people returning and the acquisition of new skills has resulted in:**

- number of nationalities has exceeded 40
- population has doubled
- an increasing percentage of young families



**Galway's success in new food development and enterprise attracts significant international and indigenous investment**



**Galway leads the development of active retirement which results in increased social and economic opportunities for the aged population**

**First commercial connection of wave machines on the west coast**



**Big-budget (€50m+) Irish-International  
co-production film starts shooting  
in Galway Film Studios**



**40% of the Irish athletics team  
for the 2040 Olympics have  
trained in the Galway  
sport complex**

**Through a process of  
blended education and work  
Galway has achieved a broader  
economic contribution and  
participation from within its  
diverse population**

**Regional 'Net' exporter of  
renewable energy**

Galway competes with California as the 'go-to' location for new technology start-ups

Galway is now a renowned world centre for advanced medical treatment & Galway city and county has the highest life expectancy in Ireland

The success of the innovation district together with the NUIG and GMIT contributions to research and technology development accounts for 15,000 jobs in the city and 20,000 in the region

Completion of the electrification of the rail system



Awarded most liveable city in Europe in 2040

Ireland becomes the marine investment capital and international financial centre for the Atlantic Arc

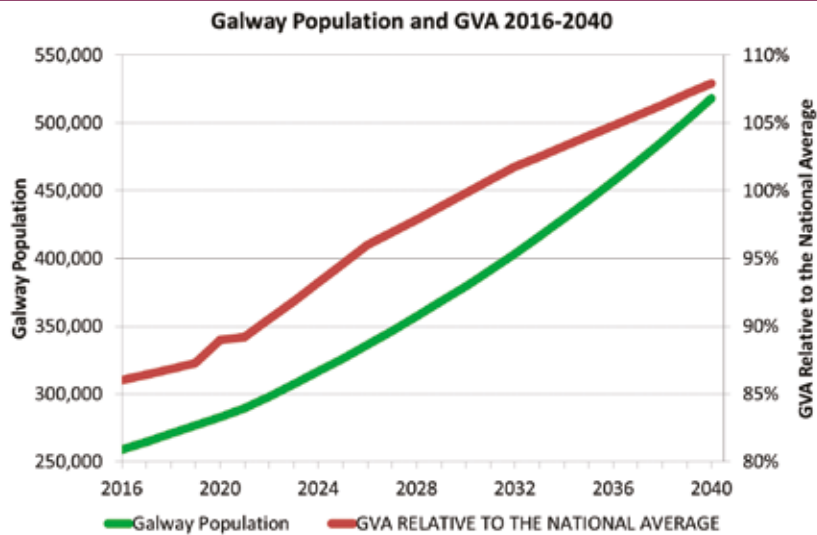
### 2040

Galway Population

City 250,000

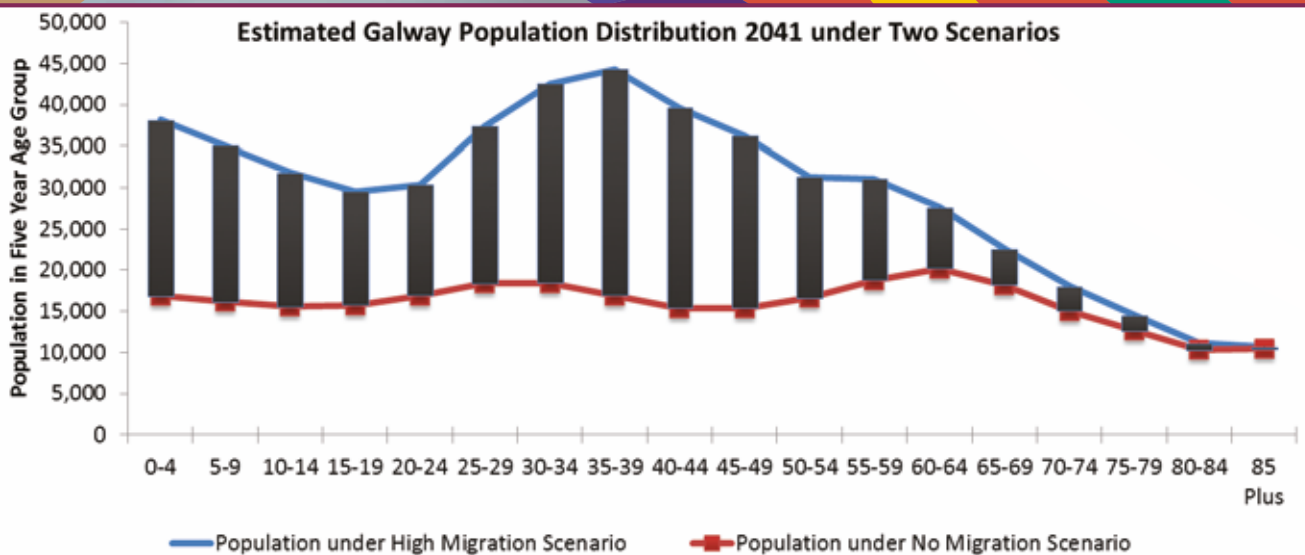
County 500,000

GVA - In Euro €70,000



### Galway Population and GVA 2016-2040

This diagram represents the evolution of the Galway population between 2016 and 2040 (green line) and the evolution of the GVA per person relative to the national average (maroon line) during the same period. The explicit population target is to double the population of the city and county from approximately 258,500 in 2016 to 517,000 in 2040. The population projections are based on a simulation model of births, deaths and inward migration. The data for this model is based on the age-group data from the 2011 Census and the preliminary estimate of population in the 2016 Census. The model applies 2015 CSO data with respect to the national-level fertility rates and death rates by age group. The death rates are adjusted to reflect improvements in life expectancy between now and 2040. The estimated GVA per person is estimated to be approximately 86% of the national average in 2016 and it is envisaged that Galway will reach the national average by 2031. The GVA estimates exclude the one-off jump of approximately €50 billion in national GVA in 2015 associated with the chemical and pharmaceutical sector. It is estimated that the total GVA for Galway will need to rise by between 5.5 and 6 per cent per annum so that Galway will reach the national average by 2031. This large rise in GVA will be accompanied by high population growth of approximately 3 per cent in the 2020s. It is assumed that the national GVA will grow by approximately 3 per cent during this time.



### Estimated Galway Population Distribution 2041 under two scenarios

In this diagram, we show the age distribution of the Galway population in 2041 under two alternative scenarios. The first scenario (blue line) involves a level of net inward migration, which is sufficient to bring about a doubling of the population. The migration estimates are based on the assumption that the vast majority of inward migration will be due to people aged younger than 45 years old. The second scenario (maroon line) involves no change in net migration i.e. no emigration to places outside the county and no immigration from outside the county. The year 2041 is chosen because it is expected that 2041 will be a Census year. On the vertical axis, each statistic refers to the number of people in each five year age bracket in each scenario. Under the no migration scenario, the age distribution becomes relatively flat with little difference in the population within each age category up to the age of 74. Under the high inward migration scenario, a much greater proportion of the population is concentrated in the prime working age categories.

A Chara,

For more than 500 years Galway has been a significant European trading port perched on the edge of the Atlantic, the ocean that binds the largest economies of the Americas and Europe. Whilst Galway's trading significance has reduced over the last 100 years, we now find ourselves on the cusp of great global change. This brings an opportunity to rebuild and rebrand both our city and county to regain their significance as European and International centres of Culture, Innovation and Commerce, making Galway a destination of choice for both citizens and visitors alike.

Building an expanded city and doubling the population of Galway city and county requires a considered, challenging and shared vision by all its people. This work was started by the late Rory O Connor almost 10 years ago and triggered a new discourse that started to bring people together to share their diverse perspectives in order to generate economic growth.

Galway Chamber, supported by GMIT Management & Centre for Creative Arts & Media , is taking this initiative to a next stage and is structuring the engagement and dialogue such that it is inclusive, imaginative, informed and fluid. Backed by strong Government support, the Chamber now seeks to engage with all of the key stakeholders in planning the future of Galway city and county.

This vision document sets out a particular view of Galway as it develops and transforms over the next 20 years. It is not intended to be a definitive path or a prescriptive sequence of events but more a guide to challenge the imagination, fuel discussion and inspire Galway's citizens to support and take ownership of the development of the new Galway, both city and county.

We believe that this process must engage the resourcefulness and ambition of every generation, young and old, present and future. The design of this document lends itself to open and interactive dialogue with all people, to solicit their vision of the future and to secure their support for its delivery.

Together we shall deliver a Galway of the future which will be internationally relevant, economically independent, a destination of choice and a caring and inclusive society.

Galway Chamber of Commerce.

## Thank You

Galway Chamber of Commerce and Industry wishes to thank the following for their support and commitment in the development of this vision of Galway 2040:

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