

ROS AN MHÍL



**Údarás na
Gaeltachta**

STRATEGIC ENTERPRISE ZONE

FEBRUARY 2023

MASTERPLAN EXECUTIVE SUMMARY



Delivering on Ireland’s Climate Action Plan

The west coast of Ireland will be a major location for the development of offshore windfarms and key to delivering the Governments vision for Ireland to become energy independent, a strategic goal of the current Government. This will see the installation of at least 5 GW of offshore wind farms in the short to medium future. The capacity exists for up to 70GW in the long-term which would make Ireland a major energy exporter.

Experience from the North Sea and other areas where offshore wind is developing is that suitable port availability can be a significant limiting factor. The west coast will require every bit of port infrastructure that can be provided to exploit the opportunities that exist. Ros an Mhíl, Co. Galway is strategically located at the centre of the west coast and has capacity to become one of the key ports required to support this industry. In 2022, Údarás na Gaeltachta commissioned an independent consulting team led by Atkins to develop a Masterplan for Ros an Mhíl ‘Strategic Enterprise Zone’ that would provide a road map for the evolution of Ros an Mhíl up to 2037.

This Masterplan as summarised here shows that, if acted upon, Ros an Mhíl could provide a fast-track route to delivering a key part of these port facilities to accelerate developments on the west coast.



Figure 1: Planned Offshore Wind Projects for the West Coast of Ireland

Future Proofing Ros an Mhíl

In February 2022 the Department for Agriculture, Food and the Marine announced €25m for the development of deep-water quay facility in Ros an Mhíl Fishery Harbour Centre. Critically, this investment recognises that the port facilities could also facilitate the development of renewable energy in the area, with the Minister for Agriculture, Food and the Marine, Charlie McConalogue, T.D. stating that the development of Ros an Mhíl is "a really good strategic vantage point to be able to service that (renewable) industry in the years ahead" ¹. Construction of the new deep-water facility with 200m long quay commenced in January 2023.

This Masterplan for future sustainable growth and development of Ros an Mhíl as an Economic Enterprise Zone allows for enhancement of the fishing industry whilst future proofing for staging, assembly, and servicing of the offshore wind industry.



Figure 2: Ros an Mhíl 2037 Masterplan layout

¹ RTE News, Tuesday 1st February 2022, Maggie Doyle

Opportunities

The **proximity of Ros an Mhíl to the 5GW** (Figure 1: Planned Offshore Wind Projects) of west coast offshore wind projects under development, and potential for over 70GW of projects regionally, **results in long term demand** for the infrastructure and supply chain proposed in this Masterplan.

The strategic development of Ros an Mhíl as a hub for wind energy support services is actively supported by fishing community representatives locally and by the local Ros an Mhíl harbour support group. This Masterplan envisages a future strategic enterprise zone in which the fishing industry and the renewable energy sector work in parallel.

A focus on readiness for the near-term development and construction phases of offshore projects is key to ensure these high value activities are situated within the Masterplan area and effectively leveraged to attract on-going Operations and Maintenance activity throughout the lifetime of the offshore wind farms.

The first west coast offshore wind farm, Fuinneamh Sceirde Teo located at the Sceirde Rocks at the mouth of Cuan Chill Chiaráin and only 20 NM from Ros an Mhíl, is expected to submit to ORESS 1 in 2023, with construction of 450MW to commence within 2-3 years of award. The subsequent floating wind pipeline will follow with an expectation of at least one additional 1GW farm requiring extensive port infrastructure before 2030 and several others currently in the pipeline.

Renewable energy companies have publicly expressed their concerns over the current availability of suitable port facilities; a view shared by representative bodies such as Wind Energy Ireland. The assessment below of Ros an Mhíl indicates its suitability for development as a Floating OSW hub should the recommendations of this Masterplan be implemented.

Requirement	Minimum Requirement	Preferred Requirement	Response	Ros an Mhíl's Suitability
Access Channel Width	150 m	200 m	Addressable through future dredging	Yes
Access Channel Draft	9 mLAT	14 mLAT	Addressable through future dredging	Yes
Quay Water Depth	9 mLAT	14 mLAT	Planning Permission in place for - 12m CD	Yes
Quay Berth Length	300 m	600 m	400m Quay proposed for Phase 2	Yes
Quay Berth Length + Staging	600 m	900 m	Manufacturing not proposed – Not relevant	Not applicable
Quay berth Width	40 m	80 m	Berth pocket width as required in Phase 2	Yes
Quayside Bearing Capacity	15 t/m ²	50 t/m ²	Design decision by DAFM – site suited to high bearing capacity	Yes

Laydown Area – Substructure Assembly	12 ha	18 ha	Suitable laydown area demonstrated in Phase 2 proposed	Yes
Laydown Area - Staging	6 ha	12 ha	Suitable laydown area demonstrated in Phase 2 proposed	Yes
Laydown Area - Manufacturing	34 ha	50 ha	Manufacturing not proposed – Not relevant	Not applicable
Laydown Bearing Capacity	7.5 t/m ²	20 t/m ²	Design decision by DAFM – site suited to high bearing capacity	Yes
Wet Storage Area	Yes/No	Yes/No	Significant suitable Wet Storage in Galway Bay	Yes
Wet Storage Depth	13 mLAT	23 mLAT		
Wet storage Location	No	N/A		

Table 1: Assessment of Ros an Mhíl’s suitability

Ros an Mhíl’s strategic advantage includes the ports’ location and **proximity to the pipeline of offshore wind farms**, and **access to temporary wet storage options for floating platforms** in Galway Bay.

The development of the necessary upgraded facilities at Ros an Mhíl to support these commercial projects requires approximately six years advance scheduling for design, planning and construction, resulting in the necessity to commence development work in the near term.

The combined construction and operational activities related to offshore wind at Ros an Mhíl would **support up to 900 jobs within the local area** and generate **approximately €70m GVA annually**.

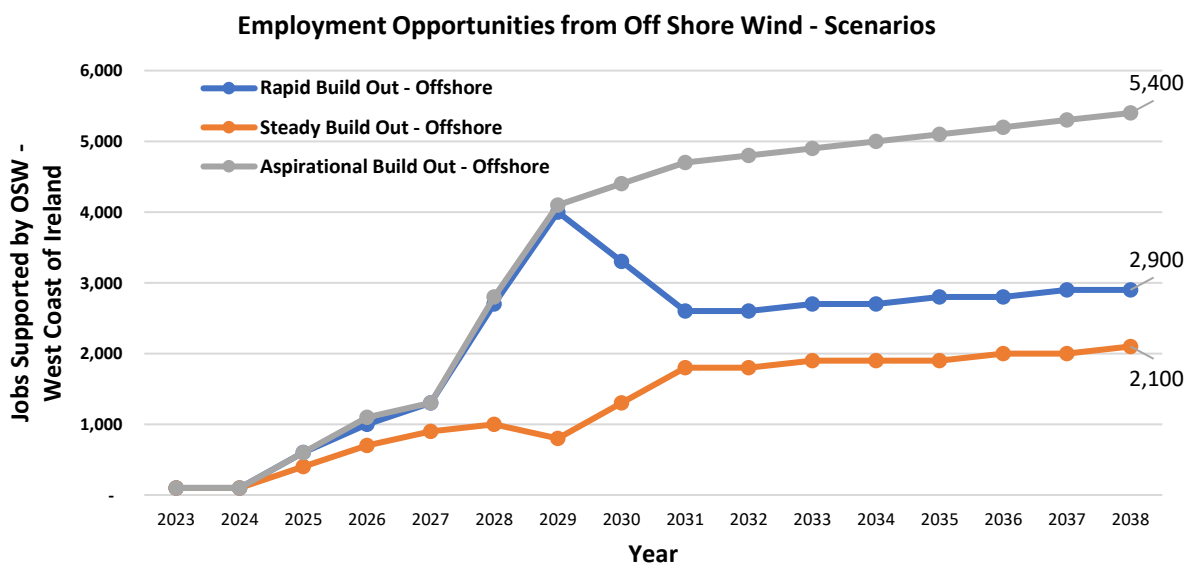


Figure 3: Employment Opportunities from OSW – Scenarios

Ros an Mhíl and its hinterlands are ideally positioned to deliver a high-skilled workforce and long-term private investment to the Galway Gaeltacht region through supporting services to the offshore wind industry but can only achieve this through targeted and pro-active investment in the near term. Without action, the significant opportunity and current first-mover-advantage over ports within and outside of Ireland will be lost. The requirement for port infrastructure to be developed and in-place in advance of the construction of the west coast offshore wind pipeline requires urgency in development, allowing for the necessary design, planning and construction timelines.



Figure 4: Masterplan View of Phase 2 at 2037

The Phased Development

Údarás na Gaeltachta proposed a collaborative approach to the development of a Masterplan utilising both the Department of Agriculture, Food and the Marine, Údarás na Gaeltachta lands and others to form a ‘Phased Masterplan’. There is upwards of 21 hectares of land which could be developed upon.

Ros an Mhíl Port is operated by the Department of Agriculture, Food and the Marine, and is uniquely mandated to support the fishing industry, which has been a key driver and agent of economic activity locally. The new industrial opportunity that the offshore wind sector creates, provides opportunity for an extension of this mandate for the management of the port to allow the local community, including the fishing community, benefit from the significant economic opportunity.

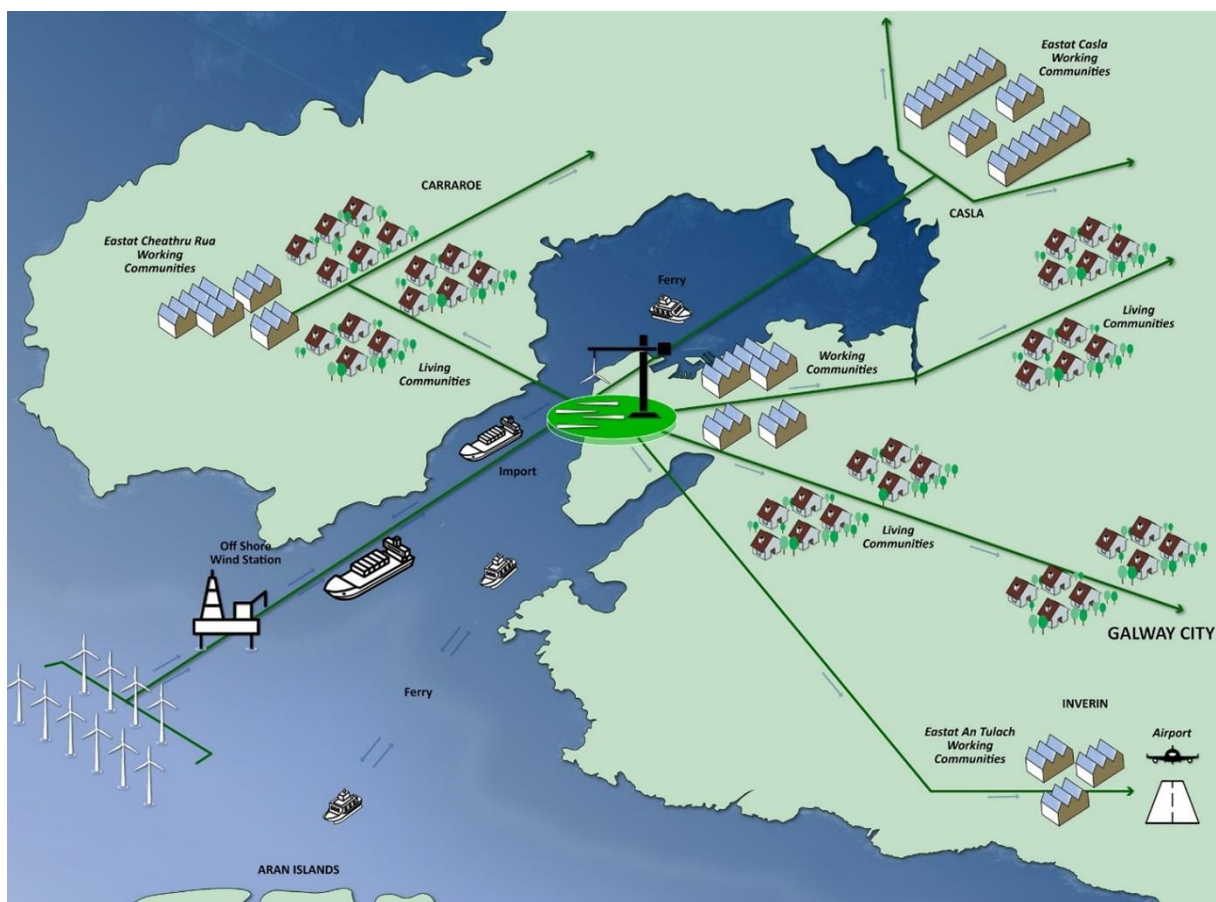


Figure 5: Benefits to the Local Gaeltacht Communities

The Ros an Mhíl Strategic Enterprise Zone Masterplan is inclusive of the established Gaeltacht community and planned population growth in the local settlement areas of Ros an Mhíl, An Cheathrú Rua and Casla.

An optimum solution for the development of Ros an Mhíl is to support parallel operations for the expanded fishing sector and offshore wind industry. This Masterplan proposes upgrades to the current development within the existing planning permission limits as Phase 1.

It also proposes a Phase 2 development, which looks at delivering extended deepwater berthing, quay facilities and ancillary services to support the offshore wind and the fishing sectors. This two phased approach will enable this Masterplan to develop its full potential as a source of sustainable employment for the region.

A **cost-effective intervention** now would deliver the additional capability required to support development and assembly work for the initial offshore wind project pipeline and begin the process of engagement with this new industrial opportunity for Ros an Mhíl. The **increase in bearing capacity** of the quay would allow handling of project cargo for the Sceirde Rocks development, which would be a major near-term impact.

Upgrade to existing Phase of Development (Phase 1 2023-2025):

- Increase berth depth to -12mCD (As permitted within the present planning conditions). This would require additional dredging and re-design of quay wall to the present project.
- Increase quay bearing capacity to 35T/m² (No conflict with planning conditions. Low CAPEX impact and critical to early ORESS 1 project support).

The expected marginal capital cost of Phase 1 upgrades is €5M above the existing CAPEX budget.

Phase 2 Development (2025 – 2030)

- Design, Development and Construction of upgraded facilities, including:
 - Extended deepwater quay for dedicated offshore wind project support.
 - Dedicated deepwater fishing berths and quay space.
 - Extended quay apron for offshore wind component transfer.
 - Wet Storage zone in Galway Bay for floating platforms.
- Concurrent with Phase 2 works, Údarás na Gaeltachta will plan, refurbish and repurpose as necessary their industrial estates at An Cheathrú Rua, Casla and An Tulach and other properties to align them with the evolving requirements of the OSW industry and with other off-shoot / ancillary service requirements.
- Údarás na Gaeltachta will also examine how the Aran Islands could help with the provision of infrastructure and services.

The capital cost for Phase 2 is subject to detailed design. Total capital cost is anticipated to be in the order of the annual GVA delivered to Ros an Mhíl by the activities it will then support.

Roadmap for the Development of Offshore Wind - Timelines to 2037

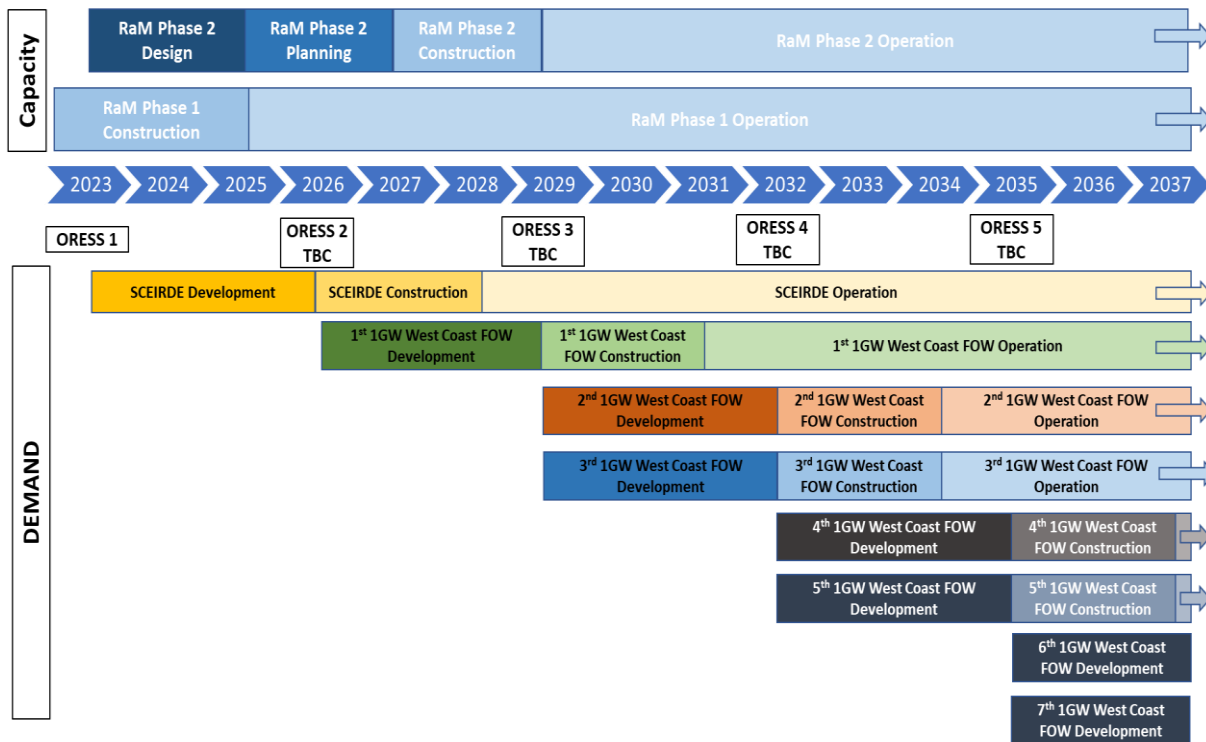


Figure 6: Roadmap for the Development of Ros an Mhíl

The summary roadmap for offshore wind project on the Irish west coast combines anticipated timings of regulatory approval for these developments to commence, with the necessary lead-in times for development of the necessary supporting infrastructure. Ensuring that port infrastructure is developed in advance of project timelines is essential to allow offshore wind benefits be realised locally. The Offshore Renewable Energy Support Scheme (ORESS) auctions are expected, once commenced, to allow projects to bid regularly for permission to commence development and the existing significant pipeline of declared projects in proximity to Ros an Mhíl supports assumptions of ongoing project development support requirements in the coming years.

Conclusion And Recommendations - Next steps to delivering Ros an Mhíl and Ireland's Climate Action Plan

If acted upon, this Masterplan could provide a fast-track route to delivering facilities to service the Floating Offshore Wind industry on the west coast of Ireland. Atkins and their team have prepared this plan with the benefit of global leaders in offshore and port development and have identified a clear opportunity for Ros an Mhíl to play a significant role in the development of Floating Offshore Wind, not only on the basis that it supports the local economy and Gaeltacht area (900 jobs within the local area and €70m GVA annually) and in meeting our Climate Action targets. However without early investment in port infrastructure, Irelands ports will out on this opportunity to other UK and European ports.

- It is recommended that Údarás na Gaeltachta and the Department of Agriculture, Food and Marine and other vested stakeholders work collaboratively to ensure that the investment secured for Ros an Mhíl is expended on a sustainable development that will best serve the local Gaeltacht community into the future.
- Seek an innovative way in which to overcome the marginal funding gap for Phase 1 upgrades before Q2 2023.
- Develop Cabinet level understanding for the necessity of cross Departmental action to deliver this strategic infrastructure for the region.
- Jointly develop a collaborative model for future Port operations and dedicated industry zones.
- Commence active development work for Phase 2, inclusive of all stakeholders, before Q2 2023.
- **Act Now!** Delays in progressing development will result in Ros an Mhíl missing a one-off opportunity to deliver a high value industrial hub in the heart of the Gaeltacht. The rapid rate of offshore wind demand compared to the long lead time of Port upgrades means there is a risk of undersupply of suitable regional port capacity. If acted on now, Ros an Mhíl can bridge that gap and ensure that benefits are capitalised locally and nationally.

Further supporting detail is provided in the full Ros an Mhíl Strategic Enterprise Area Masterplan prepared by Atkins in partnership with Dublin Offshore, Biggar Economics and VHA Architects.

Notes



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