



**Limerick  
Chamber**  
Advancing business together



# **LIMERICK CHAMBER**

**Response to the Regional Spatial  
and Economic Strategy (RSES)  
for the Southern Regional Assembly**

*March 2019*



## Contents

### Executive Summary

<b>1. Introduction</b> .....	6
<b>2. Providing a Counterbalance to Dublin: A Multi-City Approach</b> .....	6
<b>3. Limerick Shannon Metropolitan Area Strategic Plan (MASP)</b> .....	8
<b>3.1 Employment and Enterprise</b> .....	8
3.1.1 Employment Generation .....	8
3.1.2 Strengths in Attracting FDI .....	10
3.1.3 Employment Distribution .....	13
3.1.4 The Role of Higher Education .....	17
<b>3.2 Housing</b> .....	20
3.2.1 Housing diversity .....	22
3.2.2 City Centre Consolidation .....	23
3.2.3 Regeneration .....	25
3.2.4 Further Growth .....	25
<b>3.3 Strategic Infrastructure</b> .....	26
3.3.1 Shannon International Airport .....	26
3.3.2 Shannon Foynes Port Company .....	28
3.3.3 Road Network and Transport .....	28
<b>3.4 Retail</b> .....	30
<b>3.5 Tourism</b> .....	31
<b>3.6 Social Infrastructure</b> .....	32
3.6.1. University Hospital Limerick .....	32

## Executive Summary

The Regional Spatial and Economic Strategy (RSES) presents a unique opportunity to provide a regional vision for balanced growth in line with the key goals of the National Planning Framework (NPF). Limerick Chamber acknowledges the complexity of this process and makes several recommendations that will help to ensure that the conditions necessary for creating and sustaining jobs are satisfied. The Chamber is confident that the adoption of these recommendations will lead to the development of “sustainable regional competitive advantages, while increasing the attractiveness of the Region as a location to work, live and invest”.<sup>1</sup>

### A Multi-City Approach

Cork, Limerick, Waterford and Galway are the largest centres of population, employment and services outside the Capital. According to the NPF it will “require the combined potential of all four cities to be realised at an unprecedented rate, to create viable alternatives to Dublin”. The Southern Assembly RSES contains three of these four cities and as such is well placed to promote a collaborative multi-city approach, however, the draft RSES as it currently stands acknowledges Cork as the “principal complementary location to Dublin”. This goes against the best interest of the country as other towns and cities in the Southern and Western regions that are presently at risk of becoming commuter dormitories for Dublin would witness the problem being merely displaced to potentially servicing Cork. It conditions the fate of Waterford and towns from Wexford to Carlow to Portlaoise to Nenagh as commuter location to a strong Cork, rather than positioning them as vibrant towns in their own right, equi-distant from and serving two or more equally vibrant cities. Furthermore, the RSES document at present seems to envision no role for Galway in the future stories of Waterford and Cork or vice versa.

Limerick would play a central role within this new regional city cluster. As the only Irish city within 2 hours of each and all of the other cities, it scores best among regional cities on accessibility and even more so once distance times to Waterford and Cork are improved. A triangle of the three interconnected Southern cities working in collaboration with Galway provides the only effective counterbalance to Dublin, and this must be reflected in the RSES.

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<sup>1</sup>Draft RSES, p.99

### Diversification and Economic Resilience

Enterprise growth and diversification of employment is a vital component of a city's economic resilience. The draft RSES highlights specialisation and clustering as two key approaches to strengthening our enterprise base. The Limerick-Shannon MASP recognises the importance of the International Aviation Services Centre (IASC) in Shannon but fails to identify potential clusters within the Limerick area. Furthermore, in comparison to the Cork MASP, the identification of strategic employment locations in Limerick-Shannon is poor. The Chamber recognises that this is largely due to the fact that the Cork MASP benefits from the Cork Area Strategic Plan (CASP) implemented in 2014. The Limerick-Shannon MASP must therefore: (i) identify clusters and ensure funding is made available to encourage expansion; and, (ii) identify strategic employment zones with reference to size and stage of development.

### Growing Talent

The desire to build economic resilience into a local economy necessitates a portfolio approach to sectoral development that is characterised by innovation, productivity and competitiveness across all sectors. A resilient local economy will exhibit robust increases in job creation and the Higher Education Institutes (HEIs) have a key role to play in supporting this growth. Student enrolment is set to increase significantly over the next decade, however, HEIs continue to be underfunded. Given the crucial role that HEIs will play in addressing the skills shortage that is emerging across several industries, increased funding is needed as a matter of urgency. The Limerick MASP should: (i) seek funding for new facilities and technology to accommodate increases in student numbers; and, (2) identify funding mechanisms for the development and delivery of lifelong learning and apprenticeship programmes.

### Connectivity at the Heart of Balanced Regional Development

As an island nation, air transport is vital for our economy. Air connectivity plays an important role in attracting inward investment. The key objective of the NPF is to promote balanced regional growth and air connectivity to our regional airports lies at the heart of this. Dublin Airports increasing dominance poses a significant threat to the development of our regional airports. Furthermore, current National aviation policy prevents Shannon Airport from availing of funding under the Regional Airports Programme. This places them at a competitive disadvantage in comparison to private regional airports (i.e. Knock and Kerry). The Limerick-Shannon MASP must: (i) support the development of regional airports by promoting the

prioritisation of air access outside of the Capital; and, (ii) advocate for the State-owned regional airports (Shannon and Cork) to receive CapEx funding under the Regional Airports Programme.

### Sustainable Accommodation and the Existing Urban Fabric

The draft RSES does not place enough emphasis on the need to revitalise the inner-city area to make it desirable for mixed income housing. With housing remaining more affordable in Limerick than in other Irish cities and an underdeveloped city core, Limerick has very low barriers to building sustainable accommodation and related services and office buildings for in excess of 100,000 people in a redeveloped walkable central core. Key to the MASP is triggering sufficient high-density development in well considered sequential stages upon an existing urban fabric well suited to such development to ensure that housing remains affordable through the transition. Housing, public services such as health and education, and infrastructure should run ahead of (not behind) population growth. Limerick has enormous potential for this to happen in the scale required to make the NPF a success. The Limerick-Shannon MASP should prioritise a number of ongoing initiatives to provide capacity to accommodate in excess of 60,000 people within the existing built-up area. These initiatives include: (i) Georgian Newtown Pery; (ii) Docklands and Greenpark Racecourse; (iii) Continued Regeneration; and (iv) the Limerick-Shannon Metropolitan Area Transport Strategy.

### Rethinking Retail

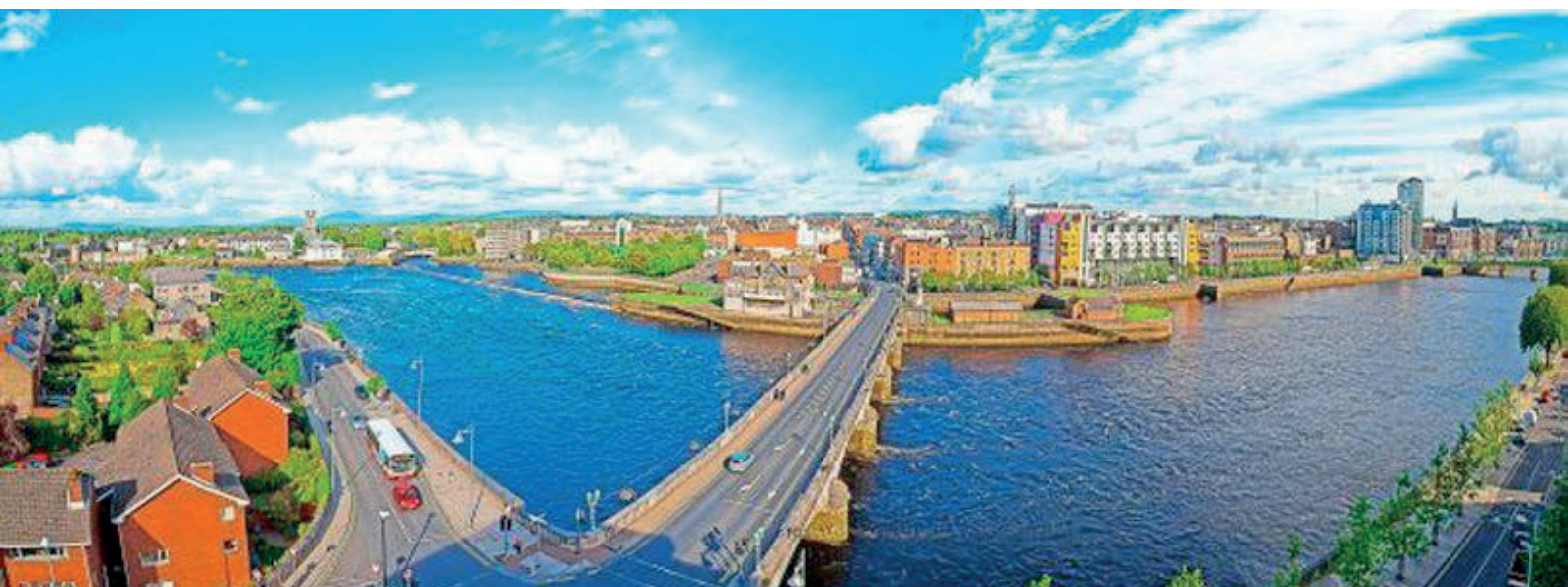
Shopping habits and retail are both in continuous development. Furthermore, a lack of population density and the growth of suburban shopping centres is contributing to consistently low levels of footfall in the city centre. With the loss of retail activity, cities are also losing attractiveness, vitality and liveability. The Retail Strategy for the Mid-West Region, 2010 to 2016, highlighted that Limerick City Centre fell behind cities in the State and no longer performed to its Tier 1 Status in the shopping hierarchy. In order to re-establish Limerick city as a vibrant urban centre at the heart of a thriving economic region, retail must be reshaped and adapted to the changing requirements of the local consumer. Limerick Chamber acknowledges that a Joint Retail Strategy will be developed during the lifetime of the MASP. Until such a strategy is formulated, the RSES should: (i) encourage the assessment of experimental retail models; and, (ii) advocate for the implementation of a Business Improvement District Scheme.

### Tourism Development

Despite its close proximity to counties that attract a high number of tourists, Limerick has significant underdeveloped potential in the tourism market. This is largely due to the lack of a key attraction in the city. However, Limerick boasts an array of underpromoted historic and tourist amenities which should be included in the region's tourism strategies over the coming years. The Limerick-Shannon MASP should therefore: (i) encourage Limerick City and County Council to collaborate with its counterparts in the region and state tourism agencies to better leverage existing asset; and, (ii) support the development of a collaborative tourism strategy which aligns local and regional tourism investment.

### Key Social Infrastructure

As the only Model 4 hospital (providing 24hr A/E care) in the Southern region with a current catchment population of 473,000, University Hospital Limerick is a major centre of health. Furthermore, in the context of spatial planning and the recent increase in motorway access to Limerick city, it is reasonable to view UHL as the most accessible hospital outside of Dublin. The Limerick-Shannon MASP should therefore: (i) recognise the regional importance of UHL in future planning and the need to expand services to cater for the larger population; and, (ii) ensure local and regional transport plans consider the significant population and geographical catchment area of UHL.



## 1. Introduction

Limerick Chamber is the largest business representative body in the Mid-West, representing over 450 members who support over 50,000 jobs across the region. Limerick Chamber welcomes the opportunity to respond to the draft Regional Spatial and Economic Strategy (RSES) issued by the Southern Regional Assembly.

The Draft RSES seeks “to plan for a more resilient society” and acknowledges that “the next 20 years present a window of opportunity to broaden our economic base, working towards a more prosperous region with a high quality of life enjoyed by all”. At the heart of the strategy lies the desire “to strengthen the settlement structure of the Region, to capitalise on the individual and collective strength of our three cities, our metropolitan areas, and our strong network of towns”. The recognition of the importance of the ‘collective’ is welcomed, however, the RSES needs to go further in promoting this idea.

Regional cities in the Southern Assembly should act together to provide a counterbalance to Dublin. It is recognised that while Dublin is a city of international importance for Ireland, in order to achieve the best outcomes both for Dublin and Ireland, our second-tier cities must thrive. The role of the Southern Assembly region as a counterbalance must involve the collaboration of the regional cities including Galway (which at present falls within the remit of the Northern and Western Regional Assembly).

## 2. Providing a Counterbalance to Dublin: A Multi-City Approach

While the National Planning Framework (NPF) acknowledges the potential for Cork to “complement Dublin” it also recognised the difficulties in realising this potential as it would require “significantly accelerated and urban focussed growth”. A more achievable alternative was presented requiring “the combined potential of all four cities to be realised at an unprecedented rate, to create viable alternatives to Dublin”.<sup>2</sup> It is imperative that the RSES adopts a similar multi-city approach as recognised in the NPF.

The NPF set out two key variables to benchmark a counter-balance: (i) the relative distance or ease of accessibility to larger centres of population; and (ii) the scale of concentration of activity. A new broader regional area combining the four cities would provide the scale and

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<sup>2</sup> National Planning Framework 2018, p. 20.



diversity to immediately match Dublin. Cork City is home to just over 200,000 people and nearly 29,000 enterprises. It cannot provide an effective counter-balance to Dublin on its own. The triangle of three interconnected southern cities would have a population of 303,000 representing 19 per cent of the Southern Assembly population (53.8 per cent if wider county regions are included). This tri-city area would provide more proximate opportunity than coastally located Cork for most of the region's almost 1.6 million inhabitants.

Integrated with the Galway city region, less than 1 hour away from the southern tri-city area, this new agglomeration would encompass:

- 1.1 million people;
- three universities;
- two international and two regional airports;
- all the tier 1 and tier 2 ports of national significance outside of Dublin;
- a veritable green playground of the Burren, Connemara, Dingle, Cashel, West Cork, all three National Tourism Corridors and the Southern half of the Wild Atlantic.
- a burgeoning portfolio of multinational investment from the likes of Analog Devices, Dell/EMC, Medtronic, Cook Medical, J&J, Pfizer, Regeneron, Apple, Uber, Valeo, Northern Trust, Intel and Ireland's largest film studio Troy;
- one of Europe's richest agricultural heartlands that supplies major food processing giants such as Kerry Group, Dairygold and Carberry, as well as some of the best quality of life locations in the world to attract international talent.

The multi-city approach would generate a significant bifurcation of public and private investment away from Dublin across each of the interconnected city regions. This would result in the sustainable development of a medieval, Georgian and traditional historical urban fabric, cultural facilities and services like health and education and would stimulate the revitalisation of the more intimate rural towns and villages that are within easy commuting distance of one or more of the four cities. There would be a vast array of locations that would be little more than an hour away from an urban centre within the cluster. This presents an opportunity for real change which can be affected more or less immediately.

It would not only change the lives of the 1.6 million people based in the Southern region in 2019 but would also create better options for the 1 million new people who will be looking for homes in our country by 2040. Dublin would no longer have to be the only viable option. And

so, it would also improve the lives of the inhabitants of Dublin by relieving demand on scarce services and infrastructure.

### **3. Limerick Shannon Metropolitan Area Strategic Plan (MASP)**

So many factors depend on how we shape our cities – social wellbeing, economic vitality, sense of community. Arguably the greatest experiment in social engineering, cities can be open, creative and dynamic. While no two cities are the same, they face similar challenges. The flip side of any challenge of course is the opportunity that a growing city offers to planners, entrepreneurs, and of course citizens.

In a similar fashion to other Irish cities, Limerick has experienced strong growth in recent years. This growth has however been to the backdrop of inadequate public infrastructure. If this continues to go unaddressed it will threaten the competitiveness and resilience of our cities. The emerging skills shortage is a key challenge facing businesses across several industries. Affordable housing and efficient public transport are some of the key factors that attract individuals to a city. It is now past time to address the historical underinvestment and turn the three metropolitan areas into the Region's competitive advantage. Limerick-Shannon, Cork and Waterford must be enabled to become better functioning and more sustainable. This requires improved infrastructure and service provision, ranging from housing, transport and energy through to healthcare, social services and investment in education.

The Cork MASP set out in the draft RSES benefits from the Cork Area Strategic Plan (CASP) and we ask that a similar level of detail be included in the Limerick-Shannon and Waterford MASPs.

## **3.1 Employment and Enterprise**

### 3.1.1 Employment Generation

***Observation:** It is important to note the changing structure of Limerick's economy in recent years. Once dependent upon a small number of large firms operating in the manufacturing industry, the city has now diversified its employment base to ensure long term economic resilience. Smart specialisation and clustering are key concepts within the draft RSES yet*

clusters are only identified for the Shannon area of the MASP. (Note: Blue text is taken directly from draft RSES).

A key factor in local and regional economic resilience is the diversification of industries and industrial clusters in a city’s economic base. Overall risk is mitigated as success is not dependent on any single industry. As a result, diversified local economies have more stable growth in the long-run and can create robust knowledge spillover networks that boost local capital investment and improve firm survival rates.

**Table 1: Limerick Employment and Enterprise Profile**

	2008		2012		2016	
	Employees (%)	Active Enterprises	Employees (%)	Active Enterprises	Employees (%)	Active Enterprises
<b>Manufacturing</b>	29.8	581	17	604	20	644
<b>Wholesale and Retail</b>	19	1837	16.6	1855	20	1839
<b>ICT</b>	13.8	348	4.7	383	9.2	424
<b>Construction</b>	12.3	2122	5.7	1794	8	1761
<b>Accommodation and Services</b>	12.5	765	10.7	804	12.9	809

Source: CSO

Limerick’s economic revival is partly characterised by a movement away from an overreliance on manufacturing towards wholesale, retail, accommodation and services. Wholesale and Retail trade now equals manufacturing, with no single industry representing more than 20% of employment. Limerick’s reduced dependency on one industry is also evident in the range of firms that have based their operations in the city, including Johnson & Johnson, General Motors, Northern Trust, Regeneron, Edward Lifesciences, Uber and WP Engine.

A country of our scale should focus its main public resources on supporting a small number of large-scale clusters. Benefits of clustering include lower production costs, increased innovation among related businesses, and increased colocation of similar and supporting businesses. These large scale clusters can be complimented by a network of smaller regional-based initiatives that play on local strengths.

One such initiative is the *National Sports Business Cluster* which is to be established in Limerick, where 500 people are already employed in sports. This cluster will leverage off a base of elite sporting facilities established at UL’s sports campus and LIT’s Sportslab (Europe’s leading strength and conditioning centre) in Thurles in addition to thirty sport-related

companies currently operating in Limerick and its catchment. The Troy Studios Film Hub in Castletroy is a new sector that has emerged in recent years and there is potential to emulate the likes of the National Sports Business Cluster in spurring clusters in the film/television and related sectors.

Shannon International Airport and the Shannon Free Zone are home to the International Aviation Services Centre, the largest aerospace cluster in Ireland. The IASC is home to over 60 companies and employs over 2,600 people in Shannon. The worldwide aircraft fleet is expected to double in the next 20 years, and there is a unique opportunity for Ireland to become a global leader in aerospace and aviation services sector, with Shannon at the heart of this endeavour. Shannon Group has secured planning permission to build a wide body aircraft paint hangar at Shannon International Airport. This is in accordance with the National Aviation Policy to “encourage the development of the International Aviation Services Centre (IASC) at Shannon”. Furthermore, The IASC recently became the first Irish member of the European Aerospace Cluster Partnership (EACP). Firms within the cluster can potentially co-operate on a European level to identify new projects, funding sources and development opportunities.

#### Recommendations: Employment Generation

- Include the following as a policy objective: *Support the development of identified and future clusters in Limerick by ensuring funding is made available beyond Stream 4 of the Regional Enterprise Development Fund.*

#### 3.1.2 Strengths in Attracting FDI

**Observation:** *The Cork MASP outlines the key strengths of the city in terms of attracting FDI. A similar section should be included within the Limerick Shannon MASP and this should draw on information included in section 6.9. (Note: Blue text is taken directly from the draft document).*

Limerick / Shannon is a massively important ICT hub for FDI. Acting as a cornerstone for the burgeoning IDA AI Island strategy, companies like Analog Devices, Jaguar Landrover, Dell/EMC, General Motors (GM) and J&J are just some of the MNCs that are drawing on the

talented pool of graduates and researchers being developed by UL, LIT, 3 SFI research centres, 4 incubators and 3 enterprise Ireland/IDA Technology Centres and the 8 community enterprise centres that serve the region. The HEIs that serve the Limerick/Shannon region are particularly responsive to the upskilling needs of industry. This collaboration has led to the development of an innovative portfolio of Skillnet funded higher diplomas in software engineering, data analytics, Middleware, Embedded systems and Security. UL is home to the Ireland's first industry driven national postgraduate MSc in Artificial Intelligence.

Limerick benefits from one of the strongest Life Sciences sectors in the country and is home to all sub-sets of the sector: pharmaceuticals (Regeneron), Medical Technology (Stryker) and Bio Technology (Johnson & Johnson). The sector is set to grow further in the next few years with a number of new (and additional) investments including: Edward Lifesciences (600 jobs), Regeneron (300 jobs) and BD (100 jobs).

Limerick City and County Council was the first local authority to establish a dedicated innovation arm, Innovate Limerick, which acts as the delivery mechanism for strategic Limerick 2030 projects. Innovate Limerick attracted Troy International Film Studios to the City. It developed the Innovation Hub and ENGINE, which provides office solutions for start-up and accelerating businesses. Limerick City and County Council has been garnered notable success in attracting FDI. Noteworthy innovations that have facilitated this success include, the co-location of FDI company employees, including WP Engine and Stats, with Council staff to ensure that companies can hit the ground running.

Limerick has recently been nominated as a Lighthouse Smart City, an award that ensures a substantial grant from the biggest EU Research and Innovation Funding programme Horizon 2020, will be available for community projects totalling €6.5m worth of investment in the City's digital infrastructure. Lighthouse cities develop and test integrated innovative solutions at district scale and act as beacons for what can be achieved through technological innovation. The +CityxChange (positive city exchange) is a smart city project that was submitted by a consortium of 32 partners including Limerick City and County Council from 11 countries. For the next five years, Limerick City along with partner cities will work together to pioneer the necessary citizen engagement that will lead to a series of demonstration projects that will enable Limerick to become a smart 'better than ambient' positive energy city. This MASP supports the establishment of Limerick as a Smart Lighthouse City. The focus in Limerick will be on the development of a new "community grid" that will be enabled by the innovative

support of key MNC partners such as Dell/EMC and Analog Devices. This innovation will see the use of smart meters, new energy sources (including hydrokinetic energy), significant grid scale storage projects, digital tools and citizen participation paradigm shifts to create what is being dubbed a ‘better than ambient’ or ‘Positive Energy District’ in Limerick’s city centre. Building out from the Gardens International building and ENGINE workspace provided by Innovate Limerick, the new District will contribute more energy to the grid than it consumes over time. A novel aspect of Limerick’s demonstration project will see Europe’s most westerly Georgian city become a testbed for the upgrade of housing stock, much of it listed, in a manner that is at the cutting edge of technological development while also being sensitive to the unique history of this historic district within the city centre (Georgian/Newtown Pery areas).

The University of Limerick (UL), Limerick Institute of Technology (LIT) and Mary Immaculate College (MIC), offer a range of undergraduate and postgraduate study programmes to support the business growth and economic development taking place in the Limerick Metropolitan Area and the wider region. Moreover, the Shannon College of Hotel Management is Ireland’s only dedicated hotel management college.

Access to airports is particularly important for the high tech FDI and knowledge intensive firms which are key drivers for economic development. The importance of Shannon International Airport in this regard is also evident in the fact that over 40% of FDI companies are located within the airport’s catchment area.

#### Recommendations: Strengths in Attracting Investment

- Include the following as a policy objective: *Seek investment in the sustainable development of initiatives of IDA Ireland and Enterprise Ireland in strengthening enterprise assets, fostering competitive locations and conditions for enterprise growth in the Limerick Shannon Metropolitan Area.*
- Move the below policy objectives from section 6.9 (with suggested edits in red) to the new section.
  - a. **Deliver and** improve quality in high speed, high capacity digital infrastructure and access for all to digital infrastructure in the Limerick Shannon Metropolitan Area subject to the outcome of environmental assessments and the planning process.
  - b. Support the initiatives of Local Authority Digital Strategies and seek investment to deliver a greener, more innovative and smarter city and metropolitan area.

- c. Support existing **and future** educational facilities in the Limerick Shannon Metropolitan Area which includes University of Limerick/ Mary Immaculate/ Limerick Institute of Technology and the Shannon College of Hotel Management as critical drivers of economic development and the fostering of an innovative, knowledge-based economy for the Metropolitan Area.
- d. The MASP recognises that the Mid-West Action Plan for Jobs (APJ) and the Mid-West Regional Skills Forum works collaboratively with all the agencies focusing on key actions and opportunities that the Limerick Shannon Metropolitan Area can offer in terms of employment generation and the fostering of the knowledge based economy, in particular relating to clustering of expertise e.g. aviation, med-tech, agri-food etc. It is an objective that the Mid-West APJ and the Mid-West Regional Skills Forum continue their work to deliver significant benefits to the Metropolitan Area and Mid-West.

### 3.1.3 Employment Distribution

**Observation:** *Both the Limerick Shannon MASP and the Cork MASP outlined areas of strategic employment, however, the Cork MASP was more successful in highlighting the potential areas of growth. A similar level of detail as in the Cork MASP should be replicated in the Limerick-Shannon MASP.*

Future growth in employment will place additional resource demands on the local economy. With an increase in the general population of about 50,000 forecast to 2040, employment numbers could increase by 30,000. The recent economic revival in Limerick city has been concentrated in two types of business: service companies, such as Northern Trust, and high-end manufacturing/research such as Regeneron and Edward Lifesciences, and Jaguar's new autonomous vehicle research centre. It follows a broad sectoral trend at a national level. These types of sectors place different infrastructural requirements on the local economy.

**Table 1: Strategic Employment Locations**

<b>Name/Type</b>	<b>Employment Numbers</b>	<b>Description</b>	<b>Capacity</b>
<b>Higher Education Institutes</b>	3000+	25,000+ students with 6,300 graduates per annum. Strong synergies with extended region and local businesses. UL is recognised for the employability of its students. CONFIRM, based at UL, is a new research centre that develops future smart manufacturing technologies. LIT has strong industry connections and is internationally recognised for its industry focused “Active Learning” courses.	Large capacity for growth at UL including a City Centre Campus. Recent expansion of LIT campus to Coonagh with potential for further growth.
<b>Shannon Free Zone</b>	8500+ 160+ companies	Largest multisectoral business park in Ireland. Plans to develop SFZ as part of a MidWest high-tech ecosystem. An established industrial base in the technology and automotive sectors, with Jaguar recently establishing a research centre in autonomous driving. Supportive start-up environment with Propeller and Gateway Hub Innovation Centre.	195 Hectares Zoned
<b>Public Hospitals</b>	3500+	Hospitals within the MASP group include UHL, the Maternity Hospital and St. Johns. It caters to a regional population of up to half a million people.	New Accident and Emergency department recently opened, with plans approved for a new 60 bed unit.
<b>National Technological Park</b>	3000+ 80+ companies	Large graduate pool from UL. Opportunity for industry collaborations. Supportive environment for start-up companies including the Nexus Innovation Centre.	71Ha
<b>Raheen</b>	3000+ 50+ companies	Located 3 miles from City Centre, offering brownfield and greenfield sites.	57.5 Ha
<b>Garden’s International Centre</b>	900+	The newly completed Garden’s International Centre offers state of the art office space, with the first tenants in place in March 2019. It is the first completed part of the Limerick 2030 plan.	
<b>Opera Centre</b>	Funding Secured	High quality city centre office space. Easy access to graduate pool, international connectivity and a vibrant city centre location.	3,500 staff



<b>Cleeves Site</b>	In development	Cleeve’s is an iconic 10 acre site, located on the northern bank of the Shannon River, just off the city centre. The site is suitable for a mix of uses including education, tourism and commercial space.	3,000 staff 4 Ha
<b>Dock Road</b>	In development	The Limerick Docklands Framework Strategy aims to grow existing commercial activity at SFPC’s 35 acre Ted Russell Docks, and also provide for the major development of non-core activities along a further 75 acre site.	120+ acres

Table 1. lists the main employment centres of the MASP area. Modern service companies want high quality office space in areas that offer a good quality of life. The completed Gardens International, the soon to commence Opera Centre and the planned Cleeves development have the capacity to add 7,000 more jobs. There should be further plans for development of central sites for continued employment growth, catering to the service type company. This type of development should also add to the core regeneration of Limerick City. The proposed development of the Dock Road would be a suitable location. Concentrations of employment outside the central city area are predominantly in Shannon, Castletroy and Raheen. The MASP area has capacity for expansion of scale at these primary locations and the IDA must prioritise them for investment. These strategic locations offer the capacity to cater to companies that require greenfield or brownfield sites, access to an international airport and third level graduates. Local transport planning must be flexible and accommodative to growth in these areas with a clear objective in the MASP transport strategy.

The implementation of the Northern Distributor Road will provide a knowledge corridor in the north-west part of the City running from LIT’s Coonagh Campus to UL. There are many opportunities for the integration of third-level education, research and development with enterprise development and the situating of lands for enterprise development in close proximity to third level institutes facilitates such integration. The Plassey Technology Park which lies at the northern end of the knowledge corridor is a prime example of this model in Limerick.

No such similar provision exists, however, towards the southern end of the knowledge corridor where the LIT Campuses at Moylish and Coonagh are situated. These campuses provide bases of research, education and enterprise development and have a particular strength in the STEM

areas. Indeed, the new Coonagh Campus is devoted almost entirely to engineering and similar fields of study and research.

In order to enhance the potential for enterprise benefits to arise from these campuses, therefore, and to replicate the success of the Plassey Technology Park, it is proposed that a new Technology Park should be identified and developed towards the Southern end of the knowledge corridor. It is acknowledged that various land-use and environmental considerations need to be taken into account before a precise location is identified but it is proposed that the principle of this be included in the RSES.

#### Recommendation: Infrastructure for Strategic Employment Locations

- Include the following as policy objectives: *(1) Seek investment to deliver a Connected and Autonomous (CAV) R&D testbed and micro smart city infrastructure in Shannon; (2) Support the development of the Limerick Docklands Strategy within the context of both commercial and potential future residential development.*
- It is proposed that the introduction to 6.2. be amended as follows:  
The Limerick Shannon Metropolitan Area meets these key elements for business location choice. The Limerick Shannon MASP identifies strategic employment locations within the metropolitan area. However, achieving NPF growth targets will require consideration for new locations and initiatives by each Local Authority. It is thus accepted that additional locations may become available and this MASP recognises the need to be flexible to accommodate opportunities and that future growth areas may emerge during the lifetime of the MASP. **In particular, it is recognised that a new Technology Park should be identified and developed at the Southern end of the Northern Distributor Road and adjacent or in close proximity to the LIT Coonagh Campus.** Future growth areas proposals should be consistent and integrate with the Limerick Shannon MASPs aim of revitalising and reinvigorating Limerick City for higher density living and high-density high value jobs.

### 3.1.4 The Role of Higher Education

***Observation:** Student enrolment is set to increase significantly over the next decade, however, Higher Education Institutes (HEIs) continue to be underfunded. Given the crucial role that HEIs will play in addressing the skills shortage that is emerging across several industries, increased funding is needed as a matter of urgency. (Note: Blue text taken directly from draft RSES).*

The desire to build economic resilience into a local economy necessitates a portfolio approach to sectoral development that is characterised by innovation, productivity and competitiveness across all sectors. A resilient local economy will exhibit robust increases in job creation and the Higher Education Institutes (HEIs) have a key role to play in supporting this growth.

As part of its December 2018 Digital Transformation Report, the *Expert Group on Future Skills Needs* conducted a number of interviews with the major stakeholders who constitute the range of industry sectors and representative bodies that will be affected by the onset of digitalisation and automation in Ireland. According to the overwhelming majority of respondents the medium-term outlook for the country is that the biggest impact in terms of work displacement will take place between 2023 and 2030. This, in tandem with the population surge that will be percolating through the HEIs at this time, will pose fundamental challenges to their capacity to deliver on the training and upskilling that will be required nationally to minimise the impact of digitalisation and/or automation on employment. Between 2008 and 2017 funding for third level institutes fell by 30 per cent and this gap in funding must be addressed in order to: (i) ensure the continued delivery of high-quality lifelong learning programmes; and, (ii) accommodate increasing student numbers.

Disruptive changes to business models will have a profound impact on the employment landscape over the coming years. Changes will range from significant job creation to job displacement, and from heightened labour productivity to widening skills gaps. In many industries, the most in-demand occupations or specialties did not exist ten or even five years ago, and the pace of change is set to accelerate. It is estimated that 65% of children entering primary school today will ultimately end up working in jobs that don't yet exist. Given this context, the Region's ability to develop, nurture, retain and attract talent has never been more critical than it is in today's rapidly changing world.

The SOLAS 2018-2021 further education and policy framework points to some key areas that need to be prioritised in the coming years, that include: increasing opportunities for lifelong learning and in particular upskilling and reskilling strategies for those already in employment through flexible learning; This flexibility will require that each individual will commit to an education and training programme that they will follow throughout their career; students will be required to develop transversal skills as well as discipline specific knowledge to address concerns that have been expressed around employability; digital skills, proficiency in foreign languages and entrepreneurial skills.

The HEIs have a fundamental role to play in addressing the skills shortage that obtain across numerous sectors including science, engineering, ICT, finance, construction and healthcare. The need for all workers to continuously develop and hone their digital skills is a common theme that is of paramount importance across all these sectors. Ireland's adult participation rate in lifelong learning (6.5%) is below the EU average of 10.7% (Employer Survey 2015). The Department of Education aims to increase the number of available Springboard+ places by 30% before 2022 in both universities and institutes of technology. Both UL and LIT have a strong track record in the delivery of Springboard+ programmes and there is scope for further expansion,<sup>3</sup> as long as these HEIs continue to invest in blended programmes that suit the needs of the lifelong learner.

Student enrolment in Ireland increased by 13% between 2012 and 2018 and is predicted to increase by a further 19 per cent before 2030. This presents a catalyst for balanced regional growth whereby the creation of third level places to offset demand should predominantly be located outside of Dublin. Limerick, as a UNESCO city, is well placed to play a disproportionately significant role in the education and/or upskilling needs of these students.

Ireland uses targeted measures to increase participation in higher education by under-represented groups and is among the leading countries in providing alternative entry routes and in enrolments by students whose parents did not participate in higher education. The 2015 National Access Plan for Equity of Access to Higher Education (2015 – 2019) aims to ensure that the student body entering into, participating in and completing higher education at all levels reflects the diversity and social mix of Ireland's population. Six key target groups were identified in the plan: (i) entrants from socio-economic groups that have low participation in

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<sup>3</sup> 5 per cent of Springboard+ courses were based in the Midwest in 2016.

higher education; (ii) first time, mature student entrants; (iii) students with disabilities; (iv) part-time/flexible learners; (v) further education award holders; and, (vi) Irish Travellers.

The number and share of students from disadvantaged backgrounds and of students with a disability attending third level rose between 2012/13 and 2015/16 (from 9,147 to 11,189 and 2,561 to 3,343 respectively). Higher education institutes can play an important role in helping to address social disadvantage by providing accelerated and supported pathways to their programmes for those who are disadvantaged; by carrying out research on the factors which give rise to disadvantage and the most effective mechanisms for combating it; and by establishing dedicated facilities to help address disadvantage in their immediate communities. The Community Engagement Gateway planned for the LIT Campus in Moylish is an example of such a facility. It is the policy of the RSES to support initiatives such as these and to seek investment to facilitate their implementation.

#### Recommendation: The Role of Higher Education Institutes

- Include the following as policy objectives: *(1) Seek funding for new facilities and technology to accommodate increases in student numbers; (2) Identify funding mechanisms for the development and delivery of lifelong learning and apprenticeship programmes; (3) Support the continuation of existing (UL and LIT Access Programme) and the implementation of future initiatives (LIT Community Engagement Gateway) that encourage increased enrolment of students from disadvantaged backgrounds.*

#### 3.1.5 South Clare Economic Strategic Development Zone (SDZ)

**Observation:** *This is an early stage proposal and as such there is no justification for the SDZ having its own sub section within Section 6 of the draft document.*

While Limerick Chamber acknowledges the potential of the South Clare Economic SDZ, the promotion of a ‘University Town’ at this point in time would undermine the revitalisation of the city centre. A key objective of Limerick Chamber is to foster and develop a strong and vibrant city at the centre of the region, as a matter of priority. International research contends that a strong city centre is vital to a strong region. The National Competitiveness Council

(2009)<sup>4</sup> has reinforced this point stating: “*Competitive cities drive competitive regions, by promoting growth and employment and joining up separate business hubs to expand existing markets and create new ones*”.

A strong and vibrant city should be developed as an economic growth enabler for the wider region. While Limerick Chamber welcomes all development to Limerick region, it has a preference at this time to see development in the city centre in the first instance, rather than in the suburbs.

#### Recommendation: South Clare Economic Strategic Development Zone (SDZ)

- The SDZ subsection should be removed from the document. Information on the SDZ should instead be incorporated into the general discussion on employment generation and future potential strategic locations.

### **3.2 Housing**

**Please note that the information contained within this section was provided by LiveableLimerick.**

***Observation:** The draft RSES does not place enough emphasis on the need to revitalise the inner city area to make it desirable for mixed income housing. The city has enormous potential, maybe more so than any other city in Ireland, for walkable multi-family living which needs to be the focus of the plan. (Note: Blue text is taken directly from the draft document).*

With housing remaining more affordable in Limerick than in other Irish cities and an underdeveloped city core, Limerick has very low barriers to building sustainable accommodation and related services and office buildings for in excess of 100,000 people in a redeveloped walkable central core.

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<sup>4</sup> NCC (2009). Our Cities: Drivers of National Competitiveness:  
[http://www.competitiveness.ie/media/ncc090421\\_our\\_cities.pdf](http://www.competitiveness.ie/media/ncc090421_our_cities.pdf)

The cost of living is a strong advantage of the city, with Limerick identified as the most affordable urban area in Ireland in which to both rent and buy residential property. When coupled with the fact that disposable incomes are higher than the national average, this is the key ingredient for successful urban living and a competitive advantage for attracting people and investment.

Key to the MASP is triggering sufficient high-density development in well considered sequential stages upon an existing urban fabric well suited to such development to ensure that housing remains affordable through the transition.

Limerick has enormous potential for this to happen in the scale required to make the NPF a success. A MASP identifying pathways to growth to a population of 300,000 can take advantage of the lack of development in recent decades in key city centre areas often viewed as a negative in Limerick. Additionally, the fact that much of the land within the city perimeter houses large low density almost exclusively social housing built in the 1950's now in great need of renewal, presents a unique opportunity to both develop a world-class Irish 21<sup>st</sup> Century sustainable city and achieve the mixed demographic neighbourhoods recommended by the NPF. By focussing investment in the inner-city areas, a modern city can be rebuilt within an urban fabric boasting centuries of tradition and historical architecture and neighbourhoods from medieval through to 19<sup>th</sup> Century Georgian.

This is not just about housing though. It will require parallel and significant investment so that housing, public services such as health, education and cultural and infrastructure can run ahead of (not behind) population growth. This should prevent infrastructure blockages or excessive cost increases so often typical of such quick population increases. This infrastructure should be scaled to also serve the much wider Southern and Western Regions given Limerick-Shannon's central role as a bridge between the two regions removing any risk of redundancy of services waiting until local population growth catches up.

With improved public transport, people working in neighbourhood key towns and even beyond, should begin to choose to live in the renewed city zones for proximity to world-class public services and culture, reversing the normal commuting practices of Irish cities and making public transport more efficient.

The Limerick-Shannon MASP recognises the ongoing regeneration programmes but as the new local area development plan is developed the potential to do more in light of the exigencies of the NPF will be recognised.

The MASP supports a sequential approach to development with a primary focus on the consolidation of sites within the existing built up and zoned areas of Limerick, supported by further development in Shannon town and in contiguous sites already well advanced for development such as Mungret College.

Local Authorities in their land use plans will identify metropolitan settlements that have the capacity to achieve higher residential densities in tandem with the provision of public transport, infrastructure and series. This should be consistent with the RSES and the guiding principles objectives and goals of the MASP.

### 3.2.1 Housing diversity

The existing nature of housing in Limerick City is well suited to the creation of a new mix of rental and ownership, social and private such as is desirable under the NPF but difficult to reintroduce in more developed city centres.

With a central urban Georgian core and existing buildings along the river of much greater height, already built for density and both surrounded by much undeveloped or underdeveloped brownfield sites, the city is poised for transport-oriented development around best sustainable principles. The riverside location and good allowance of parklands presents the opportunity to combine new multi-family housing with best in class public transport and public realm.

According to Census 2016, the percentage of households in Private Rental in Limerick City (25.5%) and Shannon (22%) are well above the State (18%) and SRA (16%) averages. The demographics of the city also suggest less “closed” established communities with above average percentages of non-Irish communities, reflecting its attractiveness as a place to live to people discovering the advantages of the city and region. However, the below average percentages of (24-44%) quartile suggests that too many young adults who grow up in Limerick leave for education or jobs in other cities. Both factors suggest an unfulfilled potential for rapid growth in excess of existing levels.

According to Census 2016, Social Rented (Local Authority and Voluntary Sector) households in Limerick City accounts for 12% of its total households while in Shannon this figure is 10%. Both are above the State (9.5%) and SRA (10%) averages. Housing Vacancy (ex Holiday Homes) in Limerick City and Shannon (7.5% each) are lower than the State (9%) and SRA



(9.5%) averages which suggest that housing development needs to commence swiftly to prevent rapid reductions in affordability.

### 3.2.2 City Centre Consolidation

The NDP sets out that strategic investment priority No.1 is Housing and Sustainable Development and that National Policy Objective 3b of the NPF requires that “at least half (50%) of all new homes in [Limerick] will be within [its] existing built-up footprint”.

The RSES sets out the framework to increase residential density in our cities and larger towns through a range of measures including reductions in vacancy, re-use of existing buildings, infill and site-based regenerations.

Given the already well-advanced Limerick 2030 plans to add substantial office accommodation in the city centre, the Limerick-Shannon MASP supports the densification of the city centre and the assembly of brownfield sites for development and the regeneration and redevelopment of Georgian Limerick for residential use.

Housing cannot be provided in a vacuum especially in higher density areas. It is important therefore that a holistic approach be taken to the redevelopment of the city centre areas to accommodate substantial increases in population.

#### Recommendation: City Centre Consolidation

The MASP should prioritise a number of ongoing initiatives to provide capacity to accommodate in excess of 60,000 people within the existing built-up area easily attaining the objective of 50% of all new housing being within that area:

- **Georgian Newtown Pery:** Housing stock and quality in the historical Georgian area is generally of poor quality, not in line with best safety standards and likely to not be ungraded for better sustainability. Many buildings are vacant especially in upper floors. Significant investment will be required to bring buildings back into use or upgrade the existing buildings. The MASP should prioritise supportive actions to be coordinated by the dedicated team at Limerick City and Council to support homeowners wanting to upgrade properties with priority given to projects designed to provide modern sustainable living rather than office accommodation. The *Living Cities Initiative* which is due to end in 2020 should be extended and modified in support of this. Public funding

must be prioritised for public realm and cultural projects which both increase the amenities available to inhabitants of the district and creating more attractive streetscapes and desirable neighbourhoods. These should be carried out in tandem with mobility strategies designed to remove unnecessary traffic from the streets of Newtown Pery and strategies to improve retail offerings and other amenities for occupants of the district. Upgrading of largely abandoned buildings along laneways within Georgian blocks in line with a new masterplan to be developed by LCCC provides considerable potential to increase the number of occupants of the district within the timetable of the NPF but will require installation of services, lighting etc.

- **Docklands and Greenpark Racecourse:** Very significant underutilised land banks beside Limerick port and Mary Immaculate College, including Greenpark Racecourse provide significant additional potential for large scale housing and mixed-use transport orientated development. The MASP should provide for the master-planning of this area in conjunction with the Land Development Agency as a new city centre high density urban neighbourhood housing some 30,000 and a basis for rapid transport services to this area and future development in Mungret/Raheen/Ballykeefe/Rossbrien.
- **Regeneration:** Regeneration areas within walking distance of Limerick's central inter-city train station could provide accommodation fully in line with the NPF objectives for in excess of 30,000 transforming previously deprived areas of the inner city.
- **Mobility Strategy:** The new Limerick Shannon Metropolitan Area Strategic Transport Strategy should be prepared with as a guiding principle the facilitation of car free living in the built-up areas of Limerick city making inner city areas more affordable and attractive choices and reversing previous preferences to live in suburban areas in Limerick city.
- **Public Facilities and Services:** Further investment should be made to continue to fill gaps in the retail and entertainment facilities available to residents of inner-city districts to make the city centre one of the most desirable place to live in the Limerick-Shannon MASP and encourage compact development of the area. Recognising the importance of cultural, heritage and sports and life-long learning facilities and public parks to the quality of life of residents of higher density areas, continued investment in such facilities must be prioritised including the World-class Riverside Project. Limerick's role as a centrally located city in the broader Southern and Northern and Western Region, in addition to its increasing population, necessitates a number of new flagship

cultural facilities of scale, including a new Library project in the Opera Centre to be established within the city centre area.

### 3.2.3 Regeneration

The Limerick Regeneration Framework Implementation centres on three key pillars – Economic, Physical and Social – that will revitalise the communities of Moyross and St Mary’s Park on the city’s northside and Southill and Ballinacura Weston on the southside by raising standards of living, opportunity and health and wellbeing for all residents of the regeneration areas.

New housing construction with mixed unit sizes and types to promote diverse occupancy and renewal and retrofitting of existing housing stock are key elements of the Limerick Regeneration Framework which will lead to the delivery of some 400 new homes and the upgrading of 900 homes across the areas of Moyross, Southill, Ballinacura Weston and St Mary’s Park.

#### Recommendation: Regeneration

- As Limerick’s population targets have become more ambitious than at the time of the original regeneration plans, the MASP should now assess the potential for one or more of these areas to serve as a national pilot for re-densification of inner-city areas of scale. The LCCC should produce a masterplan and implementation plan for such a redevelopment while at the same time identifying a broader range of regional public services and job opportunities to be housed in the same neighbourhood to reverse the singular use of such areas when they were built in the 1950s.

### 3.2.4 Further Growth

Given the potential for Limerick to easily continue to grow sustainably to exceed the NPF targets shortly after the completion of that plan, it is important to plan for growth beyond that identified for city centre areas above.

Progressing the sustainable development areas for housing in Mungret and Castletroy is recognised in the MASP. Limerick Twenty Thirty Designated Activity Company (DAC) are preparing a Masterplan of a 42-hectare residential site at Mungret Park.

### Recommendation: Further Growth

- The Mungret Park Masterplan should prioritise the provision of non-car and public transport options to and from the city centre and nearby amenities and employment.

## 3.3 Strategic Infrastructure

### 3.3.1 Shannon International Airport

***Observation:** The draft RSES does not adequately acknowledge the potential threat to regional connectivity given Dublin Airports increasing market dominance. The promotion of air access outside of Dublin must be acknowledged as a priority and funding to support same must be identified.*

Shannon International Airport is the second largest airport in Ireland with a capacity of 4.5 million passengers annually. The Airport has the largest runway in the country allowing it to cater for fully laden flights to Asia and South America and is the only airport in the country to operate with no flight time restriction. It was also the first Irish airport to offer US Customs and Border Protection Preclearance facilities to passengers travelling to the USA.

Market developments over the past number of years point to some worrying trends for our second-tier cities and wider regions with growth in the air passenger market largely confined to Dublin. As of Q3 2018, Dublin Airport's market share stood at 84.7 per cent (CSO 2018) and this is only likely to increase once construction of the new runway is complete. A continuation of this trend is likely to have serious negative implications for the NPF's goal of balanced regional development. With 95% of Irish air traffic growth in the last five years going into Dublin Airport, this is putting greater pressure on the capital's airport. In this regard, it is important to note that Shannon International Airport can immediately relieve the congestion in Dublin Airport.

The above trends indicate the need for a more targeted action at growing access to the airports outside of Dublin. Funding to assist developing new flight routes from airports outside of Dublin with a particular focus on strategic routes for inbound tourism and FDI will be a key enabler of balanced regional development. The European Commission rules on state supports to Airports has specified that airports under 3 million passengers are deemed eligible for CapEx support. Despite carrying 1.87 million passengers in 2018 current Government policy precludes Shannon from availing from support programmes which provides CapEx to private

airports at Ireland West, Kerry, Waterford and Donegal. The current programme of exchequer supports is an important driver of competitiveness for regional airports and the exclusion of Shannon is resulting in an uneven playing field.

Public transport frequency to Shannon Airport and along the corridor, from Limerick to Galway, is varied. While there are regular bus services to Galway, only five of these services per day are direct expressway services and they do not coincide with flight times. Moreover, there are currently no direct public bus services providing connectivity between Cork and Shannon. Shannon Free Zone employs around 8,700 individuals (of which only 4% use buses)<sup>5</sup>. The fact that private car is the preferred method of transport is surprising given that Shannon Town has a population of around 8,000. The employment base and local population lends itself to be a prime market for public transport.

#### Recommendations: Shannon International Airport

- The following edit (in red) is suggested for policy objective 11a: The Limerick Shannon MASP recognises Shannon International Airport as a national and infrastructural driver of economic, social and tourism growth. It is an objective to develop and enhance the strategic role of Shannon International Airport and to advocate for Shannon **to be allowed to apply for financial CapEx support on an equitable basis with other airports.**
- Include the following as policy objectives: *(1) Advocate for Tourism Ireland to prioritise the promotion of air access to airports outside of Dublin. An economic impact assessment should be conducted to identify the benefits of promoting regional airports over the capacity constrained Dublin airport; (2) Support the sustainable development of enhanced public transport connectivity to the airport including improved direct services from Galway and Cork to Shannon and improved local transport within the metropolitan area.*

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<sup>5</sup> Mid-West Area Strategic Plan 2012 - 2030

### 3.3.2 Shannon Foynes Port Company

**Observation:** *The draft RSES does not recognise the potential of Foynes Island or the role that SFPC can play in facilitating renewable energy activities.*

Foynes Island has been identified as an optimal location to accommodate larger vessels, serve wider markets and cater for future expansion of existing facilities. A key component of this is the development of a deep water berth for which land has already been zoned under the CDP. There is further potential for development under the Harnessing Our Ocean Wealth (HOOW) national plan which recognises the potential and sets objectives for the development of the blue economy including its immense potential for renewable energy resources. The HOOW identified substantial marine territory off Ireland's west coast up to 10x the size of our land mass. This can only be accessed by the seaports and as such SFPC has the potential to play a key role in facilitating renewable energy activity off the West Coast.

#### Recommendation: Shannon Foynes Port Company

- Include the following as a policy objective: *Support the infrastructural requirements of SFPC in facilitating deep water berth access to offshore resources.*

### 3.3.3 Road Network and Transport

**Observation:** *A Metropolitan Area Strategic Transport Strategy (MASTS) will be prepared for both Cork and Limerick-Shannon during the lifetime of the MASP. While the Cork MASP strongly outlines key elements that should be included in the MASTS, the Limerick-Shannon MASP does not.*

The current transport network does not support intraregional connectivity. The onset of the economic crisis resulted in reduced investment in road infrastructure and as such the motorway network remains incomplete. Urban centres across the region remain poorly connected to each other. This must be addressed if the cities are to provide an effective counterbalance to Dublin.

Private car remains the main mode of transport for all three cities in the Southern Assembly. Increased urbanisation necessitates the promotion of more sustainable modes of transport such as walking, cycling, and public transport.

Recommendation: Road Network and Transport

The following information should be incorporated into the Limerick-Shannon MASP

- Ensure the delivery of: (i) improved inter regional connectivity to the Limerick Shannon Metropolitan Area including M20 Limerick to Cork and the upgrading of the N24 to Waterford; (ii) Limerick Northern Distributer Route (LNDR); (iii) N69 Foynes to Limerick road upgrade; (iv) Upgrade of the N19 road access to Shannon International Airport; (v) Upgrade of arterial roads from the motorway network to increase capacity including the provision of public transport infrastructure and Park and Ride, including, for example, R527 Dock Road, R445 Dublin Road, including Junction 28 and R527 Tipperary Road; (vi) Upgrade of the R471 for accessing the Shannon Free Zone; (vii) Upgrade L3126 for accessing Bunratty Castle.
- **Core Bus Network:** Develop an extensive bus network across the Limerick Shannon Metropolitan Area with longer operational hours and increased frequencies to encourage the significant modal shift from the private car to sustainable transportation. Ensure the delivery of a Limerick BusConnects network to serve the Limerick Metropolitan Area.
- **Public Transport Integration:** ensure the implementation of an integrated, multi modal public transport network across the Limerick Shannon Metropolitan Area servicing strategic residential and employment growth locations, provision for interchange opportunities together with information provision and revised fare structures.
- **Walking:** Promote walking as a mode of transport within Limerick City, by removing heavy vehicular congestion, prioritising walking and cycling and significantly improving and enhancing public transport services to the area. Developing and implementing a Limerick Shannon Metropolitan Area Walking Strategy during the lifetime of this MASP to encourage modal shift to walking.
- **Cycling:** Promote cycling as a primary mode of transport within the Limerick Metropolitan Area by implementing and developing the Limerick Metropolitan Cycle Network identified in the Limerick Metropolitan Cycle Network Study.

### 3.4 Retail

*Observation: Limerick Chamber acknowledges that a Joint Retail Strategy will be developed during the lifetime of the MASP, however, there are key challenges that warrant attention at a strategic level to ensure that key projects are delivered.*

Shopping habits and retail are both in continuous development. Furthermore, a lack of population density and the growth of suburban shopping centres is contributing to consistently low levels of footfall. With the loss of retail activity, cities are also losing attractiveness, vitality and liveability. The Retail Strategy for the Mid-West Region, 2010 to 2016, highlighted that Limerick City Centre fell behind cities in the State and no longer performed to its Tier 1 Status in the shopping hierarchy.

According to research undertaken in the UK the more satisfied people are with their city centre, the less they spend through online retail. “Retail sector studies indicate that offering the right retail mix, a strong leisure offer and good customer experience helps keeping the city centre alive. Retail, as the core business activity of high streets, can in turn contribute to this vitality”.<sup>6</sup> The multifunctional nature of today’s city centres is a key factor for the area performance and this needs to be considered when planning for retail revitalisation.

In order to re-establish Limerick city as the central town centre for the region retail must be reshaped and adapted to the local consumer. This will require a multi-stakeholder strategy led by a designated Town Centre Commercial Manager. Therefore, further commitment is needed to address the following: adequate traffic arrangement for the city centre; public transport infrastructure that promotes easy access; the re-development of Arthurs Quay to create a new city square and the further development of adjoining retail areas (Cruises Street and Milk Market); and, the development of a world class waterfront that enhances the city’s retail and leisure offerings.

The retailing business model is evolving in a digital direction. Therefore, retail should be at the epicentre of any digital strategy plans developed by the local council. A digital city centre should attract consumers by offering a unique retail experience and this experience should evolve in line with data collected around shopping preferences and behaviour. Funding

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<sup>6</sup> URBACT, Adapting and Reshaping Retail in the City, [https://urbact.eu/sites/default/files/media/2-5\\_adapt\\_reshape\\_retail\\_final.pdf](https://urbact.eu/sites/default/files/media/2-5_adapt_reshape_retail_final.pdf)



mechanisms need to be identified in supporting traditional retailers in the transition to technology led, experiential retail models.

#### Recommendations: Retail

- The following edit (in red) should be made to policy objective 13a: Joint Retail Strategy shall be prepared in accordance with the Retail Planning Guidelines. **These guidelines clearly place Limerick City at the top of the planning hierarchy, this should be reflected in the Joint Retail Strategy.**
- Include the following as policy objectives: *(1) In order to re-establish Limerick as a Tier 1 Retail Centre, emphasis must be placed on offering quality residential opportunities in the City Centre that attract a high-spend demographic; (2) It is an objective to investigate the potential in developing Limerick City Centre as a unique shopping experience. Experiential models should be assessed as complements and replacement for transactional type retail businesses; (3) It is suggested that a Business Improvement District Scheme (BIDS) should be implemented with the intention of funding a Town Centre Commercial Manager.*

### **3.5 Tourism**

The MASP aims to ensure collaboration between Local Authorities and tourism agencies to develop attractions such as the Wild Atlantic Way, Ireland's Ancient East and Ireland's Hidden Heartlands. The Southern Regional Assembly recognises Shannon International Airport as a national and infrastructural driver of tourism growth and as an international gateway to the tourism assets of the Limerick Shannon Metropolitan Area, Mid-West and wider region.

Despite certain geographical advantages, and having an international airport within the MASP area, Limerick underperforms in comparison to its regional peers. Hotel capacity is far below that which is offered in other Irish cities and tourism destinations. Average nightly room rates for Limerick, as of June 2017, are €67.58, compared to €94.06 in Cork and €98.55 in Galway. With value for money a high priority for both domestic and international tourists, Limerick has a strong competitive advantage in this area. Two primary opportunities exist. To develop the MASP area tourist attractions and to act as a gateway to the regional tourist assets.

### Recommendations: Tourism

- The following edit (in red) should be made to policy 15a: It is an objective to support investment in infrastructure, increased **utilisation** of Shannon International Airport, road and rail accessibility, to maximise the potential of tourism (subject to the outcome of environmental assessments and the planning process).
- Include the following policy objectives: *(1) support and develop the tourism destinations within the MASP area, including but not limited to: The Hunt Museum, The Walls of Limerick, The Milk Market, King John's Castle and Limerick's Medieval Town, Limerick's multiple music venues, the International Rugby Museum, the Shannon River, the Great Southern Greenway, Bunratty Castle, the Frank McCourt Museum, Pery Square and the Limerick Gallery of Arts; (2) Engage with Failte Ireland to review Council run tourism infrastructure with a view to optimising their tourism potential; (3) Cost is a high priority for domestic and international holiday makers and Limerick's cost competitiveness as a holiday destination must be more heavily promoted; (4) Encourage local businesses to register with Failte Ireland to realise the potential value that registering with the national tourism body can make to their businesses.*

## 3.6 Social Infrastructure

### 3.6.1. University Hospital Limerick

**Observation:** *The regional importance of University Hospital Limerick is not recognised in the document. This is particularly important in the context of a multi-city approach to providing a counterbalance to Dublin.*

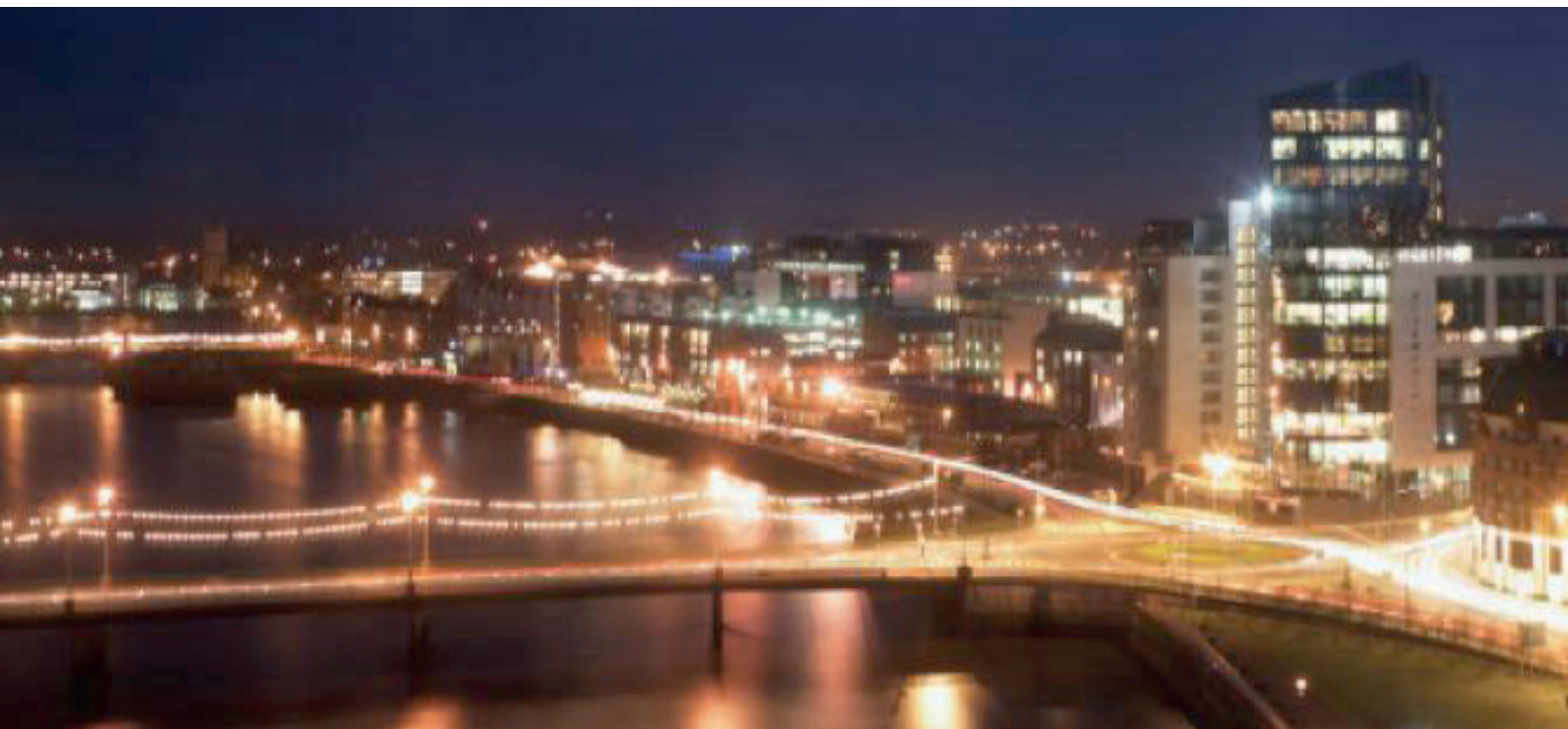
As the only Model 4 hospital (providing 24hr A/E care) in the Southern region with a current catchment population of 473,000, UHL is a major centre of health. It's current Strategic Plan 2018-2022 highlights a growing and aging demographic with the proportion of those over 65 predicted to double by 2031. Project Ireland 2040 plans include the relocation of the maternity hospital to the UHL site. The consolidation and expansion of UHL infrastructure and services

should be prioritised within the strategic plans, in anticipation of servicing a larger and older population.

In the context of spatial planning and the recent increase in motorway access to Limerick city, it is reasonable to view UHL as the most accessible hospital outside of Dublin. As such, future planning of resources should identify this strategic location for development as the major centre of health outside of the Dublin area.

Recommendation: University Hospital Limerick

- Include the following policy recommendations: (1) Recognise the regional importance of UHL in future planning and the need to expand services to cater for the larger population, working with the strategic team at the hospital; (2) Ensure local and regional transport plans consider the significant population and geographical catchment area of UHL; (3) Anticipate changing demographics in the planning of housing, transport and health care facilities both within the MASP area and as part of its greater regional role.









**Limerick  
Chamber**  
Advancing business together

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