



**Limerick
Chamber**
Advancing business together

The Future Development of Limerick City

Overview

Future Limerick Model



Presence of high skill and high-value activities



Compact growth with high housing density



Achievement of environmentally compatible commuting patterns



Location of employment opportunities in proximity to residential areas



Close integration of higher and further education and enterprise sector



Sustainability of energy, waste management and resource efficiency



Proximity to health, education, childcare and social infrastructure and services



Access to green spaces and cultural and other amenities



Excellent transport links to link with national and international markets



Focus on reducing social exclusion and youth unemployment



Use of technology based on broadband availability and development of digital skills

Context for Report



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Limerick Chamber is the largest business representative body in the Mid West of Ireland, with more than 420 member organisations supporting 50,000 jobs across the region.

Limerick Chamber's vision is for a "vibrant city and region with global ambition, recognised as the proactive and collaborative driver of economic growth". The city plays a major role in the economic, social, sporting and cultural life of Limerick and the wider Mid West. It is an important regional centre providing a focus for employment, business and social interaction, and it is a place where many people choose to live and visit. To support the future prospects of the Mid West region it is vital that Limerick city is enhanced and perceived as a desirable, accessible place which contributes to an improved quality of life.

Against the backdrop of the COVID crisis, Limerick Chamber appointed Indecon Research Economists to undertake an independent benchmarking assessment of the performance of Limerick city versus other Irish cities; to analyse international experiences and best practice; and to outline recommendations that support the development of an environmentally and economically sustainable future Limerick city.

The Future Limerick report was commissioned as a result of concerns held by Limerick Chamber and its members surrounding inter alia: the pace of delivery of key public projects; the lack of private commercial and residential development in the city centre; the decline in footfall in the city centre; the emerging skills shortage across several sectors. Moreover the report is intended to be a guide for the business community on the policy changes, investments and actions urgently required to address the impacts of both the climate and Covid-19 crises on our environment and regional economy.

The main report is broad in scope and offers 67 recommendations for Government, Limerick City and County Council and other stakeholders across nine areas stemming from the proposed model of sustainable development. The findings from the report will be used to inform Limerick Chamber's submission on the Local Development Plan and the update of the Limerick 2030 Economic and Spatial Plan. Furthermore, the report will guide discussions and debates in the lead up to the election of a Directly Elected Mayor.

This summary document does not reflect the full scope of the main report; instead it seeks to highlight several key areas that warrant immediate attention.



Urban centres must be at the heart of Ireland's development

Project Ireland 2040 has established targets for population growth across the country with: 25% planned for Dublin; 25% planned across the other four cities combined (Cork, Limerick, Galway and Waterford); and 50% planned for key regional centres, towns, villages and rural areas. The National Development Plan (NDP) is the vehicle for delivering this development through a number of funds including: the Urban Regeneration and Development Fund, the Rural Development Fund, Climate Action Fund and the Disruptive Technologies Fund.

A recent review of Phase 1 of the NDP noted “a lack of explicit consideration in project selection processes of the investment needs required for Ireland’s regional cities to grow in line with NPF targets”. Furthermore, the report noted that “the regional cities in particular appear to have a lower share of investment projects over €20 million and €100 million compared to their planned growth, suggesting investment may be taking place in the wider regions rather than within the regional cities at present”. This indicates a poorly focused regional spread of investment by government rather than the targeted approach that is required to successfully develop our urban centres as engines of economic growth. The commitment by government in ‘Our Rural Future’¹

to support rural communities is to be welcomed, however no similar strategy currently exists to support the development of our urban centres, despite their accounting for 50% of planned population growth during the lifetime of the NDP.

Greater focus is now required on how cities can facilitate increased urban living and overcome grand challenges in areas housing, digitalisation, climate change, remote working, and traditional retail decline. A review of local authority funding should form part of any strategy as an ad hoc deployment of the changes needed in our urban centres may lead to adverse impacts on some of the council’s income streams and as such provide little incentive for swift implementation.

For Limerick, a key element in achieving the vision for a thriving city will be the delivery of strategic projects committed to as part of the Limerick 2030 Economic and Spatial Plan. While several developments have been delivered (e.g. Gardens International, Troy Studios, Engine) the more transformational projects (i.e. Opera, Cleaves, world class waterfront) are five years or more from completion.



¹ <https://www.gov.ie/en/publication/4c236-our-rural-future-vision-and-policy-context/#our-rural-future-rural-development-policy-2021-2025>

Recommendations for Government

- Implement an 'Our Urban Future' strategy.
- Establish Project Ireland 2040 City Delivery Boards to drive investment in urban centres.²
- Establish an 'Urban Forum' which catalyses stakeholders across the five city regions to engage and collaborate.
- Review local authority funding to ensure that income streams are sustainable and that future income structures incentivise local authorities to implement compact growth and placemaking policies.

Recommendations for Limerick City and County Council

- Develop a live public dashboard with economic and social data that can be utilised to promote Limerick's development.
- Implement a project tracker with funding and timeline information so citizens can monitor economic and social projects across the various local authority entities (i.e. Limerick 2030 DAC; Innovate Limerick; Local Enterprise Office) in addition to collaborations with external stakeholders.
- Implement a Beta Projects web platform³ that allows the public to feed into proposed projects at an early stage.

² Also recommended as part of the Phase 1 Report Review on the NDP - <https://assets.gov.ie/134440/8bd02279-31f5-4b52-9591-93a08b2b3a10.pdf>

³ Example: <http://dccbeta.ie/>

‘Liveability’ is key to arresting city centre decline and supporting retail & hospitality

Prior to Covid-19, the high street retail sector was already experiencing an unprecedented period of decline and retrenchment, undermining the vitality of urban centres all over the country. The problems facing city centres are often blamed on a shift to online shopping (an irreversible process which has been substantially accelerated by the Covid-19 emergency) but they go much deeper than this and have a much longer history. The current crisis in our city centre is a result of poor planning decisions by successive administrations leading to significant sprawl of large housing and retail developments across suburbs. This ‘hollowing out’ has contributed to several problems in our city centre including increased numbers of vacant buildings and a general sense of diminishing shared public space.

The crisis in our city centre cannot be addressed by a ‘business as usual’ approach to the system of planning, land use, and redevelopment. Policy initiatives that promote vital, liveable city centres are essential and we must be prepared to ask difficult questions about the social purpose and economic functions of central areas if such initiatives are to bear fruit.

Repopulating the city centre will have a greater impact on its revitalisation than any other policy intervention. We must therefore, first and foremost, deliver quality affordable residential units in our city centre, through a combination of refurbishment of vacant existing stock (short term) and new developments (medium to long term).

There is a need to ensure that housing supply increases to meet forecasted population growth for Limerick. ESRI estimates that the population in Limerick city and county will grow by 10% by 2040. Indecon notes that this rate is lower than the national average and would fail to meet the targets of the National Planning Framework. However, even with this lower level of population growth, there will be a requirement for approximately 1,100 new homes per year over the next 20 years. This would represent a 100% increase on the current annual delivery rate for Limerick City and County. This does not account for historical undersupply of affordable homes that has led to Ireland having the highest rate in the EU (47.2%) of individuals aged 25-29 still living with their parents.



WHITING
a caught
in the Atlantic ocean



Policy formation cannot simply be about meeting basic future targets however, it is crucial that we ensure that the appropriate mix of housing is delivered in the right locations.

Population density is important in ensuring a sustainable economic base and in realising the benefits of economic externalities. This is fundamental to meeting climate change objectives and in supporting a vibrant retail and local service economy. The population density in Limerick city and suburbs is higher than Cork but is lower than Galway and Dublin. Increasing the population density in Limerick city is a critically important challenge for the future development of the city.

City centres have historically been the focus for retailing. However, traditional high streets are facing challenges due to changing retail patterns. To support the vitality, vibrancy and viability of the city centre it must refocus and adapt through diversification.

Retail has long played an important role in animating the city streets, creating an enjoyable ambience for residents and visitors alike. Retail remains an important function of the city centre and should be targeted for specific supports to the end of 2030.

The Chamber acknowledges that the local authority is conducting a Retail Strategy due for publication this year. As part of a strategy to support existing and future retail, and to enable the city to prosper, a broad mix of other uses that will increase footfall, dwell time, and provide economic and social activity during the day and into the evening, should be supported. Evening and night-time entertainment is an important part of a city's economy where arts and culture come to the fore. An increase of people of all ages using the city centre for differing activities at different times of the day, evening and night will have a positive impact on social engagement and change perceptions so that people consider it a safe and comfortable place.



Recommendations for Government

- Evaluate the merits of potential changes and adjustments to the Living City Initiative to increase the level of take up.
- Extend vacant property planning exemption (Statutory Instrument 30 – 2018) beyond December 2021 and consider other adjustments to the vacancy timeframe.
- Potential measures to address upper floor vacancies should also be examined. This should be done in tandem with a streamlined regulation and planning process.
- Strategic development areas should be identified in the city to facilitate new quality affordable residential developments. This could potentially be introduced in tandem with strengthened regulation and improved access to finance for small and medium developers.

Recommendations for Limerick City and County Council

- The focus of all policies and investments should be on facilitating compact growth.
- Targets should be set (and monitored) to achieve an increase in apartment and other residential regeneration developments in inner areas of the city.
- Accelerate the delivery of projects within the Limerick2030 Economic and Spatial Plan (in collaboration with Limerick 2030 DAC).
- The Georgian Neighbourhood ‘one-stop-shop’ should be established on a more permanent footing (currently organised on an ad hoc basis).
- Following publication of the planned Public Realm Strategy, implement a placemaking plan for the city centre (including pedestrian zones;

green areas; on-street dining infrastructure; disability access; child-friendly amenities; Intelligent street furniture with charging facilities) that caters for the needs of all demographics and encourages people to dwell. Engage in extensive public consultation to encourage citizens to become invested in placemaking initiatives. This plan should inform the city's 'Traffic Management Plan'.

- Drive the 'experience economy' by promoting the city centre as a place for leisure, entertainment and non-retail experiences with the publication of a seasonal curated programme of events.
- Develop and promote the night-time economy in line with the forthcoming recommendations of the national Night-time Economy Taskforce.

- Designate temporary street performance areas in the city centre. Furthermore, build on the success of the Limerick Street Art Trail by incorporating interactive art installations.
- Support existing and new retailers to implement a targeted programme to enhance 'curb appeal' for premises.
- Assist retailers in accessing global marketplace through the development of 'Shop Limerick' as an online shopping platform for local small businesses.
- Consider establishing Park & Stride sites on the periphery of the city centre. In addition, expand e-parking website/app to include a real-time data for on-street parking availability in the city to reduce search traffic and vehicle emissions.

Greater progress needed in transitioning to a green economy

As might be expected in a report addressing existing and future challenges for a modern city, recognition of the primacy of measures to address the global climate crisis underpins all recommendations.

A key issue for Limerick (and for any review of the Limerick 2030 - an Economic and Spatial Plan) is that cities in Ireland as in other countries are significant contributors to greenhouse gas emissions. In meeting climate change objectives, the energy efficiency of housing units has been identified as a key area where potential gains can be made.⁴ This is related to the age profile of the building stock. Only 11% of housing in Limerick and suburbs was built post-2000. As older buildings tend to have much lower levels of energy efficiency, this suggests the potential value of retrofitting programme for housing in Limerick city.

An analysis of housing stock by energy rate shows that there were only 3% of housing in Limerick City with A rating. The fact that around 45% of housing had a D, E, F, or G rating highlights the need for a major retrofitting programme as part of the strategy for sustainable growth in Limerick City.

The connectivity of the population base in Limerick city and the means of travel are fundamental in ensuring that Limerick city can meet climate change objectives. Evidence on the commuting patterns of the population in Limerick city examined by Indecon indicated that more than half of the population in Limerick city rely on a car to travel to work or school or college. Ensuring that the infrastructure and services are available to reduce this percentage, is an important challenge for the city. Indecon has used Geographic Information System (GIS) techniques to analyse the accessibility to essential facilities (Hospitals, Schools, Parks) within the Limerick metropolitan area. The results show that accessibility to services by pedestrians is particularly high in most of the electoral districts of the metropolitan area, where it is possible to reach these facilities within 10 minutes from virtually every point. Highlighting and utilising the strength of proximity within Limerick city should be a core element of a future sustainable strategy.

The results of the analysis carried out suggest that the city has the potential to facilitate a significant shift in commuting patterns.



⁴ See Indecon's Needs Analysis to Inform Priorities for ESF+ and ERDF for 2021-2027

Recommendations for Government

- Increase funding under the Energy Retrofitting Programme for Social Housing
- Consider expanding the pilot Building Renovation Passport scheme to target increased refurbishment of city centre stock.

Recommendations for Limerick City and County Council

- Establish a Limerick Energy Forum to support the development of the Green economy.
- Coordination at local level of the national funding available for deep retrofitting programmes (grants/competitive loans/workshops) for private residential units in city centre.
- In line with the Climate Action Plan (CAP) and the Limerick Metropolitan Transport Strategy (LSMATS) develop an ambitious implementation plan (with particular emphasis on cycling, walking and e-vehicles) in collaboration with relevant stakeholders in the city.

- Implement technology to provide efficient means of travel. For example, a Limerick travel app that draws on the bus/rail information provided on the TFI Real Time Ireland app but also includes information on safe cycling, accessible walking routes, bike stations and e-charging locations.
- Invest in the necessary ICT and Smart Energy storage infrastructure so that Limerick is well placed to access any energy surpluses from the Moneypoint.
- Work with industry and academia to plan for the long term whereby over supply from offshore energy production can be used to address energy poverty.

The background of the page features a photograph of several school children walking along a path. In the foreground, a young man and a young woman are walking towards the camera. They are wearing school uniforms consisting of white shirts, dark trousers or skirts, and blue and red striped ties. Behind them, other children are visible, some looking towards the camera and others looking away. The setting appears to be an outdoor school area with a brick wall and trees in the background.

Opportunities exist for educational gaps to be reduced

The US Nobel Prize Winner, Professor Kenneth J. Arrow, in an analysis of economic growth policy for Ireland, highlighted that the quality of the labour force is of great importance to economic development and especially in determining per capita output. Arrow also pointed out that “universities are now moving into a more important role in increasing labour productivity than they have in the past”.⁵ Indecon’s analysis demonstrates the strengths of Limerick in terms of its education institutions, the levels of educational attainment and the skill base of the population. This is confirmed by the judgement of businesses and other stakeholders surveyed which demonstrated that the educational institutions and infrastructure were seen as important strengths of the city.

Indecon’s analysis on the level of education of the population in Limerick city shows that despite the progress which has been made, there is a lower proportion of people with at least a third-level qualification in Limerick city compared to the other Irish cities. Furthermore, Limerick has a higher than average percentage of individuals classified as unskilled or semi-skilled and it is crucial that these individuals

are not left behind. The distribution of qualifications achieved by graduates in 2018 was very similar across Limerick, Dublin, Galway and Cork. However, the percentage of higher education Science, Technology, Engineering and Mathematics (‘STEM’) graduates is lower in Limerick than in the other three main Irish cities.

Indecon’s analysis of Limerick’s education and skills base suggests that a percentage point increase in the share of the population with a STEM degree results in an increase in employment of about 0.21 percentage points, and that a percentage point increase in the share of the population with any bachelor’s degree increases employment by 0.18 percentage points. This implies that over time there is a potential for employment in Limerick to increase significantly by increasing the number of STEM graduates who chose to call Limerick city home and by closing the difference that exists, (in terms of the number of graduates and the share of degrees in STEM subjects), with Cork, Dublin and Galway. According to the analysis by Indecon, the employment rate in Limerick city could increase by 5.4% from 43.7% to 49.1% if this gap with

⁵ Arrow, J.K. Economic Growth Policy for a Small Country, in Gray, A. W., (1997), International Perspectives on the Irish Economy, ISBN 0953131807



other metropolitan regions was bridged. Therefore, it can be concluded that efforts to increase the share of graduates living in Limerick and in particular graduates in the STEM subjects would support sustainable growth in the city.

The high percentage of employability of graduates from Limerick's higher education institutes is testament to the high quality of our post-primary and third level education system. The share of the graduates from UL who stayed to work in the Mid West region after their degree increased from 38% in 2015 to 46% in 2018 and this is a positive development. The comparable figure for TUS: Midlands Midwest was 62% in 2018. As national institutions, it would not be realistic or appropriate to assume that all or even the majority of UL/TUS: Midlands Midwest graduates would initially remain in the region. However, ensuring that there are suitable employment opportunities for graduates and developing measures to attract graduates subsequently to return to Limerick must continue to be a priority objective.

Recommendations for Government

- Increase investment in further and higher education. In particular, ensure the provision of infrastructure to facilitate planned growth in student numbers (especially in the city).
- Fast track the development of the Technological University of the Shannon: Midlands Midwest.
- Conduct an apprenticeship future needs assessment, which also considers any obstacles faced by businesses in hiring apprenticeships, to better understand the unique requirements of industry within each region.
- The Government has committed to establishing a pilot programme for guidance counsellors to ensure that school leavers have access to the same level of information about apprenticeships as those in higher or further education. One option that should be considered is that this pilot would be based in Limerick given the city's skills demographic.

Recommendations for Limerick City and County Council

- Investigate the creation of a dedicated multi-use space in the city centre to showcase real world STEM applications and provide facilities for workshops and guest lectures for teachers, students and the general public. Opportunities also exist to utilise this space as a tourist attraction.
- Introduce a marketing campaign to attract remote workers (digital nomads) and high performing start-ups to Limerick.

Recommendations for Other Stakeholders

- Increase STEM graduate numbers by targeting students at primary and secondary level through coordinated actions that supports and builds upon existing initiatives such as the Mid West STEM alliance, Explore Engineering and BD STEM stars. (Mid West Regional Skills/LCETB/Limerick Chamber)
- Expand programmes of cooperation between employers in the region and students in higher and further education. (Mid West Regional Skills/LCETB/Limerick Chamber)
- Build on the innovative approach of 'dual learning' by expanding the model that has been implemented for programmes such as *Immersive Software Engineering* and *Manufacturing Digitalisation* to other engineering and science disciplines. (HEI's)
- Develop a Mid West skills and employment web platform to highlight availability of apprenticeships and upskilling/reskilling programmes. This will support 'brain gain' and also help address the skills gap issue present in certain sectors. (Mid West Regional Skills/Chambers of Commerce)
- Consideration should be given to developing a mobile Mid West careers fair (Mid West Skills/Chambers of Commerce)

Health and social inequity pose a real threat to future development

Limerick has the second highest disposable income per person after Dublin (and exceeds the national average). Measures to assist Limerick to gain increases in per capita incomes should continue to be an objective of future plans for the city. Indecon, however, notes that a sustainable model of development should be much wider than standard means of income increases. Rather, a holistic approach to development is required encompassing both economic and social objectives.

While supporting business is key to Limerick's growth, the needs of regular citizens must be at the forefront of any development plan, so that people are not left behind and the benefits of economic growth can be shared by a large percentage of the population. The relatively high proportion of individuals receiving welfare payments in Limerick (10.2% vs 8.2% average across other cities), is a notable concern from this point of view. Furthermore, Indecon's analysis shows that an estimated 10,527 individuals are at risk of poverty in Limerick city.

Five out of eight of Limerick's unemployment blackspots (unemployment higher than 20%) are located in the city: John's A (58.3%), Galvone B (45.0%), Ballynanty (43.6%), Abbey C (Pennywell, 41.9%) and Prospect B (40.7%). Indecon's analysis of deprivation examines the level of deprivation across electoral divisions in Limerick city and takes into account educational level, labour market situation as well as the skill/occupational profile. The results show that extremely and very disadvantaged areas mirror unemployment blackspots.

A recent study by the Health Information and Quality Authority found a significant association between deprivation and respiratory mortality in the Mid West. The report noted that "Limerick city is the most deprived local authority area in Ireland and contained 21 of the 24 electoral divisions in the HSE Mid-West that were found to have significant elevated respiratory mortality rates".⁶ Limerick city also has the highest standardised mortality rate in the country.

⁶ <https://www.hiqa.ie/sites/default/files/2020-12/Spatial-patterns-of-respiratory-mortality-in-the-HSE-Mid-West-region.pdf>

Recommendations for Government

- Implement actions to target unemployment blackspots.
- Develop seamless 'top-up' pathways between FET (particularly apprenticeships) and higher-level institutions.
- Increase investment in support services to reduce social exclusion (e.g. childcare facilities, access to healthcare, provision for the disabled).
- Renewed focus in supporting the implementation of the Youth Guarantee which pledges that participants will receive a quality offer of an education, training and/or work experience opportunity within 4 months.

Recommendations for Limerick City and County Council

- Establish Health Action Zones, similar to the South West, to target health inequalities through empowerment, involvement, consultation and participation to enhance inclusion and sustainability (in collaboration with HSE and UL Hospitals Group).
- Facilitate the implementation in the city of national plans to support youth employment through the establishment of a one-stop-shop Youth Desk.
- Ensure that the aging population and high dependency ratio are factored into future planning by updating the Age Friendly Limerick 2015-2020 Plan. Older people's views should be incorporated through an extensive consultation process. Furthermore, targets should be measurable, and progress should be monitored on an ongoing basis.

Conclusion

A shared vision for what a city or region aspires to be in the future is needed to inform the policy and infrastructural investments decisions that will affect Limerick's development and growth trajectory, influencing where people choose to live and invest.

The Government and local authority are required to support the ambitions for regional development that have been advanced by Project Ireland 2040. Investing in our urban environment has direct business benefits, improves quality of life, and generates tangible savings in welfare and health spending. Building vibrant, living cities represents a win-win scenario for a wide range of personal, private and public interests.

The sections listed above represent key elements of an environmental and economically sustainable model proposed by Indecon for Limerick's future development. Without a concerted effort across government, local authority and key stakeholders, there is every risk that Limerick city will fall short of reaching its potential.

Limerick Chamber therefore calls on the government, local authority, and key stakeholders to proactively address the key issues highlighted in the Future Limerick report.



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