Limerick 2030
An Economic and Spatial Plan for Limerick
Appendices

NOVEMBER 2014

Limerick
CITY & COUNTY
COUNCIL

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Appendix 1
Baseline
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1.   Introduction

This baseline review encapsulates and summarises much of the analysis undertaken to enable the preparation of the Economic and Spatial Plan for Limerick. It presents an overview rather than a detailed report of every aspect of the analysis. It addresses the following:

- **Policy Context** - a review of existing national, regional and local policy

- **Economic Analysis** – an economic review of the proposed economic and labour market issues and opportunities

- **Property Market Analysis** – an assessment of the market demand for different uses in Summer 2012

- **City Centre Spatial Analysis** – a narrative and plan review of the principal features of the City Centre – highlighting issues, challenges and opportunities

- **City Centre Traffic Management Review** – a high level review of how the road/traffic management system functions

- **Exemplar Studies** – examples from across the world that have influenced thinking on a thematic basis

2. Policy Context

This section highlights the most significant and pertinent policy position as it impacts on Limerick.

National Policy

National Spatial Strategy 2002-2020 (NSS)

The NSS is a twenty-year strategic planning framework designed to deliver more balanced social, economic and physical development between regions. A commitment to prepare a spatial strategy, to plan at national level for the country's future spatial development, was included in the National Development Plan 2000-2006. The NSS designated nine Gateways to develop new and existing cities so as to concentrate development within these settlements and allow them to reach their full potential. Nine hubs are designated under the strategy to provide support to the gateways and the rural catchment surrounding the hubs. It is likely that a review of the NSS will begin in the near future, possibly within the next 12 months.

The Limerick/Shannon Gateway has been designated as a joint Gateway due to the status of Limerick as the third largest city in Ireland, along with Shannon, which provides its international urban connections. The NSS focuses on improving infrastructure connections between cities and it is an objective of the strategy to improve links between Galway, Cork, Limerick/Shannon and Waterford so as to provide a polycentric network which would counterbalance Dublin. The linking of these cities falls under the Atlantic Gateway designation (Appendix 2).

With regard to the Mid-West the NSS states that the "Mid-West (Counties Clare, Limerick and North Tipperary) will require the enhancement of the performance of the Limerick/Shannon Gateway at national/international level. This is needed to lever additional investment for the overall region, through its critical mass, strategic location, capacity for innovation and development and connections within the national transport framework. Limerick/Shannon Gateway will be supported by Ennis as a hub, taking advantage of the latter's relationship with the Limerick/Shannon Gateway and its strategic location between Limerick and Galway. Other towns and rural areas should be supported in developing complementary roles which avail of the spin-off benefits which the performance of the Limerick/Shannon Gateway will bring to the region." [1]

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[1] National Spatial Strategy 2002-2020, Section 4.5 "The Mid-West Region", pg.82

National Development Plan 2007-2013 (NDP)

Ireland's fourth National Development Plan envisaged a total investment of €184 billion over 7 years, to 'secure the further transformation of our country socially and economically within an environmentally sustainable framework' (NDP pg. 10) [2]. Like all the NDP's, the plan sets out specific allocation of financing to certain projects that are of national/regional importance. The NDP is to assist in the implementation of the NSS. It should be noted that the requirement for the NSS came from the third NDP (2000-2006) and thus, despite the intention, the two documents are not fully aligned.

The Limerick/Shannon Gateway is specifically mentioned within the NDP and details are provided regarding which infrastructure and programmes will receive funding;

- Improved Transport:

  - Increased rail service between Limerick and Dublin

  - Completion of the Western Rail Corridor

  - Improvement in Bus Services

  - Improved access to Shannon Airport

  - Completion of M7/N7, the Southern Ring Road and the N69 (Tralee)

- Other Physical Infrastructure

  - Significant upgrading of the public areas and streets in Limerick City Centre and re-imaging of Limerick through a major urban renewal initiative

  - Delivery of critical infrastructure in a co-ordinated manner to provide for the re-development and renewal of the Docklands Area

  - Development of leisure and technology parks as well as strategic sites

- Other Policies and Strategies

  - Implement a cultural, recreational & public amenity strategy for Limerick

  - Strengthening the R&D capacity of Third Level Institutes

  - Implement a shared innovation strategy between education & enterprise sector so as to improve the Third Level and Enterprise sectors

Due to the ongoing recession the NDP has been replaced by the Infrastructure and Capital Investment 2012-2016: Medium Term Exchequer Framework.

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[2] National Development Plan 2007-2013, pg. 10

Infrastructure and Capital Investment 2012-2016: Medium Term Exchequer Framework

The Infrastructure and Capital Investment Plan/Programme 2012-2016: Medium Term Exchequer Framework provides details of the funding that will be provided up to 2016. The reason this document has temporarily replaced the NDP is due to the financial crisis that has affected the country. This document has limited allocation of funding but it does commit to continue to provide funding to any project that is already at contract stage. In the case of Limerick this includes the University of Limerick Medical School, King John's Castle and Limerick Riverside development. The framework also makes a commitment to continue to provide funding for the Limerick Regeneration Areas. Though one-off projects may be announced, any project that is not specifically mentioned within this framework will not receive funding.

Limerick Local Government Committee

The Committee was asked to provide a report as to the most appropriate arrangements for the governance of Limerick City and County. There were a number of challenges facing Limerick as it attempted to continue to develop in line with the NSS. The report noted that whilst individual local authorities performed competently, cooperation across institutional boundaries was weak on strategic issues. It also noted issues in Limerick's core such as a falling population, higher unemployment and a clear need for renewal. The report recommended expanding the area designated as a "City" and to provide for a single authority that would replace Limerick City Council and Limerick County Council. The new authority will be known as "Limerick City & County Council." This policy is being implemented by the Limerick Reorganisation Committee.

Other National Documents;

- **Sustainable Development: A Strategy for Ireland, 1997** provides a framework for the achievement of sustainable development at local level.

- **National Climate Change Strategy 2007-2012** aims to ensure Ireland reaches its target under the Kyoto Protocol to limit greenhouse gas emissions.

- **Statutory Guidelines** are issued by the Department of the Environment, Community and Local Government regularly to Planning Authorities on aspects of planning policy and these are considered and should be noted. Examples of these include *inter alia* the Retail Planning Guidelines, the Development Management Guidelines, Flood Risk Management Guidelines, Architectural Heritage Protection Guidelines, Urban Design Manual, etc.

Regional Policy

Mid-West Regional Planning Guidelines 2010-2022 (RPG's)

There are 8 Regional Authorities in Ireland and Limerick is contained within the Mid West Region. Every six years, since 2004, a Regional Authority must produce a set of Regional Planning Guidelines that provide for the development of the region. The role of the RPG's is to:

- Disseminate the policies contained within the NSS and NDP throughout the regions

- Provide objectives and targets to guide development plans by Planning Authorities

- Promote the co-ordinated development of the region

- Assess the current state of the region and to assess its development potential over a twelve year period

Under the Planning and Development (Amendment) Act 2010, it is necessary for Planning Authorities to be consistent with the objectives contained within the Regional Planning Guidelines. This also includes a necessity to provide a "core strategy" which details an evidence base for the zoning of residential development.

The RPG's see the Regeneration Projects as significant positives for Limerick City. It also notes that the administrative area of Limerick City is less than that of its area of influence. With regard to this, it notes the conflicting issues and challenges that accompany this, such as councils competing for development and commercial rates.

Limerick City is described as a fine grain City Centre that is yet to establish a "core City Centre". This is due to suburbanisation, poor upkeep of public areas and competition from neighbouring authorities. The RPG's also recognise that there are a number of industrial estates linked to Limerick City. The RPG's comment on other settlements that are included within the economic study area;

- Newcastle West: Important service town in West Limerick

- Askeaton: Links to Foynes Port and the possibility of a power generation project

- Kilmallock: It is a principal service centre for East Limerick and there is a potential for a re-opening of the rail station

The only other issue identified is a potential flooding issue but this will depend on site specifics.

Mid-West Retail Strategy 2010-2016

Colliers CRE were commissioned to revise the 2003 Retail Strategy, which covers the areas of Limerick City Council, Limerick County Council and Clare County Council. The report was published in December 2009 and contains some key findings. For instance, it found that within the Mid-West

Region there is an existing oversupply of retail floorspace due to years of development that were followed by the economic downturn.

With regard to Limerick, it found that, based on trading patterns and the retail market offer, the core shopping areas of Limerick City were sub-standard. Its share of retail floorspace had more than halved since 2002, as consumers visit newer, out-of-town centres and retail parks. As a result, the report found that Limerick City Centre is far behind similar settlements such as Cork and Galway and is no longer performing its role in the retail hierarchy. It also found there is too much suburban retail development in the Limerick Urban Area and when this is coupled with the current lack of demand the results are a high level of vacant retail properties.

Mid-West Area Strategic Plan 2012 (MWASP)

The four Local Authorities in the Mid-West Region, which includes Limerick City Council (as lead) Clare County Council, Limerick County Council and North Tipperary County Council have prepared a Draft Strategic Plan which examines the future for the Mid-West Region. The Mid-West Area Strategic Plan was prepared to secure the following overall objectives:

- Prioritisation of investment in the Region

- Strengthening The Limerick/Shannon Gateway as the core of the Region. The promotion of the existing city and environs (the metropolitan city) as the economic driver for the Region is fundamental

- Strengthening the Limerick/Shannon Gateway, Nenagh and Ennis as the Hubs in terms of population growth

- Create and support a well defined hierarchy of settlement, as defined in the Mid-West Regional Planning Guidelines, which will support the development of a series of rural economic nodes such as Newcastle West, Thurles and Roscrea

- Deliver the required transport infrastructure to meet the Plan objectives

- Optimise the organisational structure to facilitate the delivery of the Plan objectives

- Provide economic review and direction for the Region

MWASP is a strategy to facilitate a regional population of 500,000 no. persons that has been set for a 20-year time frame. An outcome of the strategy is a requirement for a significant public transport investment requirement (€340m from 2012 – 2032), excluding the cost of land, buses or locomotives. In the summary of the report it recognises that an integrated and proactive approach will be required to grow the economic base and attract investment in both Limerick City and the Region as a whole. It also notes the importance of Newcastle West and Kilmallock as "Rural Economic Nodes"

Other Regional Documents;

- Mid-West Energy Balance & Climate Change Strategy – February 2008

- Mid-West Tourism & Economic Plan – June 2006

- Atlantic Gateways Initiative – September 2006

Local Authority Policy

Limerick Development Plans

Under the Planning and Development Act 2000 (as amended), it is a requirement for a City/County Council to review their Development Plan every six years. The purpose of the Development Plan is to;

- Identify key issues that affect the relevant plan area

- Develop policies and objectives that are consistent with the NSS, NDP and the RPG's

- Provide standards and policies that will manage the development of the relevant area

There are two plans that apply to this study, Limerick County Development Plan 2010-2016 and Limerick City Development Plan 2010-2016. These plans set out the detailed land-use strategy for the City and the wider metropolitan area and determine the nature and extent of individual land uses.

Limerick County Council Development Plan 2010-2016

With regard to the areas outside of the Limerick City Council boundary, but within the scope of this study, the County Development Plan has policies and objectives that apply to each;

- Newcastle West is a key town which has experienced a recent increase in population and has had this matched by an increase in its hinterland. It is selected for growth in its retail sector (both comparison and convenience)

- Kilmallock is a walled town and is a key town within the county that is also targeted for growth in its retail sector (both comparison and convenience). There is poor public transport to this town and there are opportunities for development of its tourism sector. There are plans regarding the retention and development of the walls around the town. [3]

- The lands owned by Shannon Development are specifically zoned within the development plan. Objective ED O4: Safeguarding Askeaton Industrial Park notes that the lands shall be zoned for industrial use of regional importance

- Objective SS O9 is an objective to provide for a local area plan for the areas of Castletroy and the Southern Environs which are on the southern boundary of Limerick City but are part of the Gateway, as defined in the NSS

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[3] Kilmallock Town Walls Conservation & Management Plan and Kilmallock Walled Town Public Realm Plan

Local Area Plan (Limerick County)

The aim of a Local Area Plan (LAP) is to establish a framework for the planned, co-ordinated and sustainable development of the area and for the conservation and enhancement of its natural and built environment over the period of the Plan. The following LAPs exist within the functional area of Limerick County Council:

- Southern Environs Development Plan 2011

- Castletroy Local Area Plan 2009

- Askeaton Local Area Plan 2009

- Kilmallock Local Area Plan 2009

- Newcastle West Local Area Plan 2008

The LAP's for Castletroy and the Southern Environs are designed to integrate these areas into the Gateway of Limerick as designated in the NSS

Limerick City Council Development Plan 2010-2016

The City Development Plan addresses the following areas;

- Economic

- Retail

- Transportation

- Housing

- Regeneration

- Social & Community

- Arts, Culture, Creativity & Tourism

- Built Heritage & Archaeology

- City Centre Area Profiles

- Development Management

There is an additional Core Strategy for Limerick City that was adopted in April 2012. Core strategies are a requirement under Section 10 of the Planning and Development Act 2000 (as amended). [4] The strategy is designed to control the availability of land for residential development so as to avoid a saturation of the market or development of property in a non-sequential manner.

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[4] Section 10(1A) Planning and Development Act 2000, as amended by Section 7(A) Planning and Development (Amendment) Act 2010

With regard to economic development and the City Development Plan, it is the objective of Limerick City Council;

- To develop an enterprising City, based on a wide sector mix

- To create and maintain a unique and attractive City region to attract foreign direct investment and employment

- To provide for a diverse range of employment needs so that people with a diverse range of skills can find work in the City

- To support sustainable growth of third level institutions in the City, in particular research and development, and to foster links with business

- To provide balanced spatial employment to reduce the need for travel and also to provide balanced economic growth throughout the City, in particular in the regeneration areas

- To maximise the use of available land, including the intensification and re-use of existing land and buildings

- To ensure new locations for employment have access to public transport

Specifically, the City Centre is seen as the key driver of economic activity for the region, being the focus for retail, cultural and commercial activity and it has the potential for significant expansion and intensification.

It should be noted that a new functional Local Authority will be required to prepare an all encompassing Development Plan that covers its administrative area. In this regard, the statutory review period for both the County and City Development Plans (projected to begin in 2014) and the preparation of this Economic and Spatial Plan provides an opportunity to ensure that there is a strong evidence base for the new, primarily spatial, development plan(s).

Other Relevant Local Authority Documents

Limerick City Centre Strategy 2008

The City Centre Strategy is a concise document which details actions that need to be taken to improve the city core. There are nine strategic themes on which these actions are focused;

- Access and Movement

- Urban Design

- Urban Living

- Tourism and Recreation

- Heritage and Culture

- Education and Employment

- Retailing

- Environmental Management

- Measures to release strategic blocks of land

One of the key themes within the City Centre Strategy is to provide for the regeneration of derelict and underutilised sites within the City Centre, especially those near the existing retail core. The City Centre Strategy has been given a statutory function through the City Development Plan.

Regeneration

Social deprivation, as well as an acknowledged failure of delivery of state services within the City, gave rise to the creation of the Limerick Northside and Southside Regeneration Agencies, which were established by the government in 2007. These agencies were charged with regeneration of a number of areas including Moyross and St. Marys on the Northside and Southill and Ballincurra on the Southside. These agencies were charged with the physical, social, economic, community and housing regeneration of these areas.

In 2012 Regeneration came under the responsibility of the merging Limerick City & County Councils, under the Home & Community Directorate. A significant monetary budget is allocated to address the objectives of Regeneration.

3.   Economic Analysis

This section provides an overview of the current socio-economic conditions in Limerick and includes the most recent data releases from the 2011 Census of Ireland. In order to represent all relevant geographical areas and to provide useful comparisons for analysis we have presented the data for the following geographies;

- Limerick City Boundary

- Limerick County Boundary

- The future Limerick Metropolitan Boundary (Met Area)

- Limerick City and County Combined (Limerick)

- Republic of Ireland (State)

Profile

Area of Investigation

The metropolitan boundary of Limerick City is changing following local authority re-organisation and we have reflected this in the report. The exact boundary of the future Limerick City Metropolitan Area has not yet been confirmed and so a boundary has been defined and presented in the map below. Our definition comprises the existing Limerick City boundary in addition to the urban areas within the Southern Environs Local Area Plan and the Castletroy Local Area Plan and this is represented in Figure 1.

All data presented in this report for the Limerick Metropolitan Area (Met Area) is representative of the area shown in the map and has been collected from Census 2011 data for Small Areas. (This analysis has been developed for this report, the boundary used is indicative as it is not an officially defined boundary).

Figure 1: Limerick City Boundary
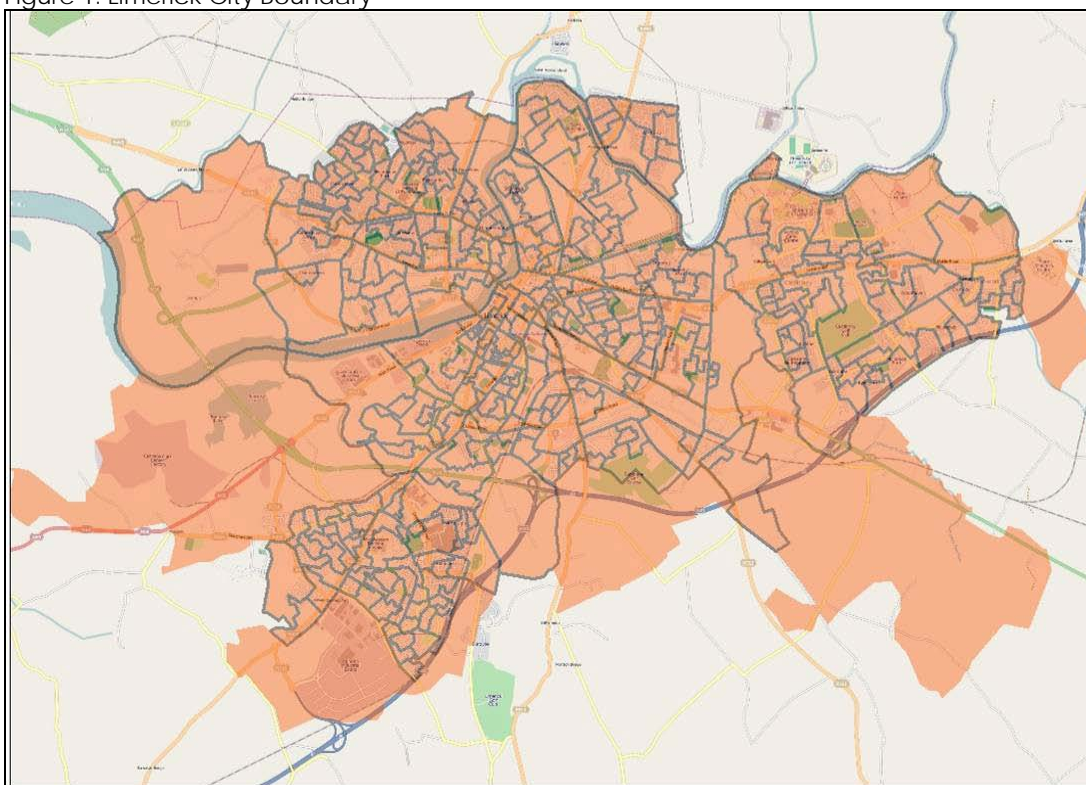
Source: AECOM based on City Development Plan, Southern Environ Local Area Plan and Castletroy Local Area Plan

Population and Demographics

The total population of Limerick City in 2011 was 57,106 and the population of the County was 134,703. The combined population of the City and the County totalled 191,809 and constituted just over 4% of the total population of the State. The population of the Limerick Metropolitan Area presented here is 95,242.

Table 1: Population and Age Structure, 2011

Age Group	City	County	Met Area	Limerick	State
Under 15	10,231	28,833	18,071	39,064	979,590
15 - 24 years	9,057	17,995	16,113	27,052	580,250
25 - 64 years	30,297	72,083	50,841	102,380	2,493,019
65 years and over	7,521	15,792	10,217	23,313	535,393
Total	57,106	134,703	95,242	191,809	4,588,252

Source: Census 2011

The population structure and age distribution of the Metropolitan Area and the City are relatively favourable in economic terms as 70% and 69%, respectively, are of working age compared to 67% at the County and State level. Relative to other geographies a high proportion of the new Metropolitan Area and Limerick City's population are between the ages of 15 and 24 which points to a growing workforce over the next 10 years.

Table 2: Population Structure, 2011

Age Group	City	County	Met Area	Limerick	State
Under 15	18%	21%	19%	20%	21%
15 - 24 years	16%	13%	17%	14%	13%
25 - 64 years	53%	54%	53%	53%	54%
65 years and over	13%	12%	11%	12%	12%
Total	100%	100%	100%	100%	100%

Source: Census 2011

The population of the City, County and State have seen significant change since 2006. The City has continued its recent trend of population decline whilst the County and the State experienced population increases. Table 3 below presents the absolute and proportional population changes between 2006 and 2011.

Table 3: Absolute Population Change 2006 to 2011

City	County	Limerick	State
-2,684	10,438	7,754	348,404
-4.5%	8.4%	4.2%	9.1%

Source: Census Data 2006 & 2011 and AECOM Analysis

Employment

The Mid-West and Limerick have been more exposed to economic shocks than the rest of Ireland and this is primarily due to their above average reliance on low skilled employment in manufacturing and construction. In 2006, 17% of the Mid-West workforce was employed in manufacturing compared to 12.6% nationally. There was also significant employment in construction as part of the wider Ireland property bubble. Total employment in construction in 2006 was 11.3% of the active workforce. Therefore, in 2006, 28% of employment in the Mid-West Region and Limerick was in the vulnerable sectors of manufacturing and construction.

Table 4: Mid-West Employment Structure 2006 and 2011

	2006		2011	
Sector	Number	%	Number	%
Agriculture & Mining & Utilities	12,275	8%	12,786	9%
Manufacturing	27,324	17%	19,948	14%
Construction	17,728	11%	7,719	5%
Wholesale & Retail	20,358	13%	20,542	14%
Restaurants & Accommodation	8,447	5%	8,269	6%
Transport & Communication	9,409	6%	7,699	5%
Business Services	15,878	10%	15,283	11%
Public Sector	33,890	21%	37,751	26%
Other	15,178	9%	13,672	10%
Total	160,487	100%	143,669	100%

Source: Census 2006 & 2011 and AECOM Analysis

In 2011 the proportion of the Mid-West workforce employed in Manufacturing had fallen to 14%, whilst the proportion of employment in construction had plummeted to 5%. Therefore the proportion of the workforce in vulnerable sectors in 2011 totalled 19%. Industries that had increased their proportion of total employment between 2006 and 2011 included the Public Sector (+5%), Business Services (+1%) and Wholesale & Retail (+1%).

Table 5 below shows the current sector mix in the City, County and Mid-West compared to the State as a whole. Clearly, construction and manufacturing still have an above average dominance within the Mid-West economy. Industries that are less dominant than at the national level include wholesale & retail, business services and the public sector.

The City is in contrast to the Region and has an employment structure that is more similar to the State, with a higher proportion of employment in business services and the private sector, although the public sector is still the dominant employer. Away from the public sector, the majority of employment in the City is in wholesale & retail (18%), business services (13%) and manufacturing (12%). The City also has a higher than average proportion of employment in restaurants & accommodation and transport & communication. In 2011, 15% of employment in the City was in vulnerable sectors compared to 21% at the County level, 28% at the Regional level and 16% at the State level.

Table 5: Employment Structure by Geography - 2011

Sector	City	County	Mid-West	State
Agriculture, Mining & Utilities	1%	9%	8%	6%
Manufacturing	12%	15%	17%	11%
Construction	3%	6%	11%	5%
Wholesale & Retail	18%	14%	13%	15%
Restaurants & Accommodation	9%	5%	5%	6%
Transport & Communication	7%	5%	6%	5%
Business Services	13%	10%	10%	15%
Public Sector	24%	31%	21%	31%
Other/Not Stated	12%	8%	9%	10%
Total	**100%**	**100%**	**100%**	**100%**

Source: Census 2011

Across all sectors of the City economy, with the exception of education, employment has declined in real terms. The aggregate fall in employment between 2006 and 2011 was 5,479, a proportional decline of almost 23%.

The City has experienced significant structural adjustment since 2006. Levels of employment in manufacturing (-2,522) and construction (-1,061) have fallen dramatically and in 2011 made up a much smaller proportion of total employment than in 2006. Conversely the proportions of employment in the public sector, wholesale & retail and restaurants & accommodation have

increased despite a real decline of -176, -457 and -97 jobs respectively. Since 2006, the proportion of employment in business services has increased minimally, although real employment has declined by -652 jobs.

Table 6: Limerick City Employment Structure 2006, 2011 and Change

Sector	2006	2011	Change No.	Change %
Agriculture, Mining & Utilities	189	173	-16	-8%
Manufacturing	4,803	2,281	-2,522	-53%
Construction	1,690	629	-1,061	-63%
Wholesale & Retail	3,839	3,382	-457	-12%
Restaurants & Accommodation	1,692	1,595	-97	-6%
Transport & Communication	1,737	1,214	-523	-30%
Business Services	3,119	2,467	-652	-21%
Public Sector	4,590	4,414	-176	-4%
Other/Not Stated	2,239	2,264	25	1%
Total	23,898	18,419	-5,479	-23%

Source: Census 2011

Census data for 2011 is also now available at Small Areas level which enables us to analyse data at the Metropolitan Area level. In total there are 33,606 workers living within the new Metropolitan boundary and 9,356 unemployed people which gives a total labour force of 42,962. This represents a significant increase on the previous City boundary.

There are some differences in terms of the sector breakdown used at the City level and this makes comparison difficult but some key comparisons are identified. For example public sector (public admin and professional services) in the Metropolitan Area contributes 30.8% of all employment. This is much higher than the current Limerick City boundary (24%) but similar to the proportion at the County level (27%). Commerce & trade contributes 25% of employment in the Metropolitan Area, whereas across the current City boundary 31% of jobs are in this sector and 24% in the County.

Table 7: Employment by Sector – All persons aged 15 years and over who are at work

Sector	Jobs	Met Area %	City	County
Agriculture, Forestry & Fishing	149	0.4%	0.4%	8.2%
Building & Construction	1,134	3.4%	3.4%	5.8%
Manufacturing Industries (incl. Mining and Utilities)	4,793	14.3%	13.0%	15.8%
Commerce & Trade (Retail and Business Services)	8,418	25.0%	31.8%	24.7%
Transport & Communication	2,794	8.3%	6.6%	5.0%
Public Administration	1,695	5.0%	4.7%	4.9%
Professional Services (Education, Health and Social Work)	8,681	25.8%	19.3%	22.4%
Other (Hotels & Restaurants and all other)	5,942	17.7%	21.0%	13.2%
Total	33,606	100%	100%	100%

Source: Census 2011 – Small Area Population Statistics

Unemployment

Table 8 below presents unemployment by age and the proportion of the labour force that is actively participating in the economy. Across all age groups the unemployment rate in the City is almost 29%, this compares to 19% for the state and 17.5% for Limerick County. Across the Metropolitan Area the unemployment rate is 21.7%, which is closer to the State average than the City. As a consequence of data limitations it is not possible to provide unemployment totals or rates by age group at the metropolitan geography.

Table 8: Unemployment and Labour Force Participation, 2011

Age Group	Labour Force Participation Rate %			Unemployment Rate %		
	City	County	State	City	County	State
15 - 19 years	16.3	9.4	12.2	67.9	57.5	58.8
20 - 24 years	52.2	51.6	59.8	45.1	34.6	34.7
25 - 34 years	80.1	85.4	86.4	27.9	18.7	18.8
35 - 44 years	78.2	82.8	83.2	26.0	14.3	16.2
45 - 54 years	73.7	79.9	80.0	23.8	13.9	15.8
55 - 64 years	53.3	60.9	59.8	23.7	16.1	18.2
65 years and over	5.8	10.6	8.9	11.8	3.8	5.4
All age groups	**55.1**	**60.2**	**61.9**	**28.6**	**17.5**	**19.0**

Source: Census 2011 and AECOM Analysis

Compared to the County, Limerick City has a lower proportion of working age people in the labour force and a lower proportion of the labour force in employment. However, the urban areas immediately bordering the current Limerick City boundary appear to have considerably higher proportions of the labour force in employment, which has the effect of reducing the current high employment rate seen in the City when the boundary is expanded to the Metropolitan Area.

Employment status looks at a number of categories across the population over 15 years of age. The employment status for persons aged 15 years and over is determined on the basis of the subjective assessment of the person responsible for completing the census form in each household.

Table 9: Employment Status

Employment Status	Persons	%
Looking for First Job	850	1%
Unemployed	9,356	12%
Student	13,060	17%
Looking After home	6,180	8%
Retired	8,982	12%
Unable to Work	4,380	6%
Other	466	1%
Employed	33,606	44%
Total	**76,880**	**100%**

Source: Census 2011 – Small Area Population Statistics

Across the Metropolitan Area there are 76,880 people over the age of 15 of which 19% are economically inactive, i.e. they are either looking for first job, unemployed or unable to work. A

further 37% are students, retired, looking after the home or other and the remaining 44% are in employment.

Benefit Claimants

The global recession has had a significant negative impact on the level of employment in Ireland and its cities. Table 10 below presents the number of people on the Live Register in 2001, 2005 and 2010. The Live Register includes part-time workers, seasonal and casual workers and unemployed entitled to Jobseekers Benefit. In the nine years between 2001 and 2010 the number of people on the Live Register in Ireland increased by almost 287%, whilst the number on the Live Register in Limerick (City and County combined) increased by over 300%.

In Limerick, the proportional increase in the number on the Live Register has been greater than the increase in the number on the Live Register seen across the State as a whole. In both 2001 and 2005 those on the Live Register in Limerick made up 4.5% of all people on the Live Register but by 2010 this had increased to 4.8%.

Table 10: Number on the Live Register, 2001 to 2010

	2001	2005	2010	Change
Limerick	6,954	7,106	20,970	301.60%*
State	152,406	155,833	437,079	286.80%*
Limerick as % of State	4.5%	4.5%	4.8%	-

Source: Statistical Information on Social Welfare Services 2010, Department of Social Protection
*'Statistical Information on Social Welfare Services 2010' stated 201.6% and 186.8%

Jobseekers Benefit does not give the whole picture of social and economic deprivation in Limerick. Table 11 below presents a selection of indicators taken from benefit claimant data. Given that Limerick constitutes around 4.2% of the total population of the State it would be expected that if Limerick had average levels of deprivation it would make up 4.2% of total benefit claimants.

Limerick stands out as having above national average levels of deprivation with Illness Benefit at 5.3% and Basic Supplementary Welfare Allowance at 4.3%. However, Limerick performs well across most other indicators, including Child Benefit where the number of children receiving benefit is below the anticipated proportion given its current population.

Table 11: Selection of Benefit Data, 2010

	Child Benefit Recipients	Child Benefit Children	One Parent Family Payment	Illness Benefit	Basic Supplementary Welfare Allowance
Limerick	24,885	46,561	3,848	4,320	1,595
State	591,432	1,124,003	92,326	81,253	37,499
Limerick as % of State	4.2%	4.1%	4.2%	5.3%	4.3%

Source: Statistical Information on Social Welfare Services 2010, Department of Social Protection

Presented below are definitions of each benefit type:

Child Benefit – is payable to the parents or guardians of children under 16 years of age, or under 18 years of age if the child is in full-time education.

One Parent Family Payment – is a means tested payment which is made to men or women who are caring for a child or children without the support of a partner.

Illness Benefit – is a payment for insured people who cannot work due to illness.

Basic Supplementary Welfare Allowance – is a weekly allowance paid to people who do not have enough means to meet their needs and those of their qualified children.

Skills

According to the 2011 Census for Ireland, only 22% of the population over the age of 15 (and no longer in education) in Limerick City had a Higher Certificate, Degree or Post Graduate Degree qualification. This compares poorly to the County and the State where 28% and 29%, respectively, of the population over the age of 15 has a Higher Certificate, Degree or Post Graduate Degree qualification.

As noted above in the employment opportunities tables, Limerick can be described as having a relatively low skilled economy when compared to the rest of the State but also when compared to other Celtic Economies. Over 37% of the population between 16 and 64 in Scotland are qualified to degree level or higher and over 29% in Wales.

With regard to education levels across the Metropolitan Area, 29.6% of the population is qualified to Higher Certificate or higher qualification and 25.2% have a Degree or higher qualification. This compares to 18.2% for Limerick City and 23.5% for the County. The population within the new Metropolitan Area would thus have a higher skilled population than either the City or the County.

Looking at Social Class and the levels of skills in the workforce the metropolitan area has a higher proportion of managers, higher and lower professionals (30.5%) than the City (23%), although it has a lower proportion than the County (34%).

The Metropolitan Area includes 13.6% of the workforce as semi-skilled and unskilled, whilst the City is higher at 15% and the County lower at 11%.

Figure 2: Skills Level
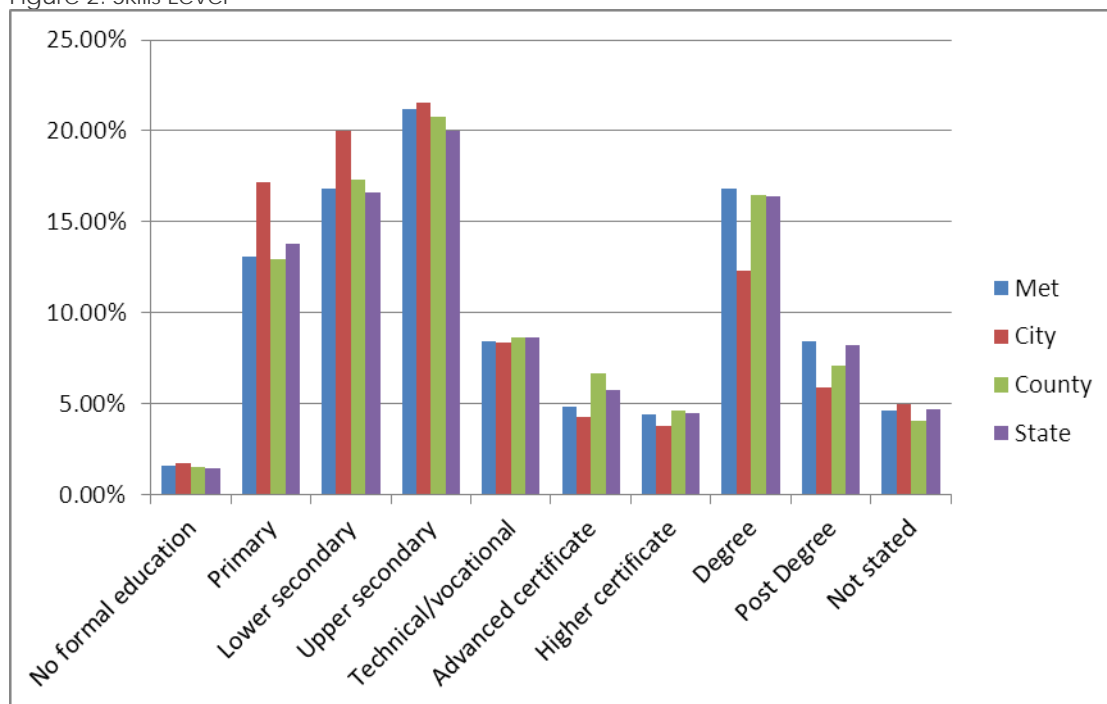
Source: Census 2011 and AECOM Analysis

Table 12: Social Class

Social Class	Persons	% Met Area	% City	% County
Employers and Managers	11,828	13.0%	10%	14%
Higher Professional	6,917	7.6%	5%	7%
Lower Professional	9,011	9.9%	8%	13%
Non-Manual	17,827	19.5%	22%	18%
Manual Skilled	8,459	9.3%	9%	9%
Semi-Skilled	9,068	9.9%	10%	8%
Unskilled	3,410	3.7%	5%	3%
Own Account Workers	3,569	3.9%	3%	4%
Farmers	259	0.3%	0%	6%
Agricultural Workers	94	0.1%	0%	1%
All Other	20,854	22.8%	29%	17%
Total	**91,296**	**100.0%**	**100%**	**100%**

Source: Census 2011 and AECOM Analysis

Socio-Economic Responses

Skills Provision

At Third Level education the main providers of education are the University of Limerick (UL) and Limerick Institute of Technology (LIT) and Limerick School of Art & Design (LSAD). In 2010, there were over 2,500 graduates who completed a full-time programme of study at UL and 1,700 graduates at LIT.

The University of Limerick offers courses at undergraduate and postgraduate level as well as a variety of research positions, courses for international students and continuing learning courses. At the undergraduate level courses are spread across six schools: Education; Art; Humanities & Social Science; Health Sciences; Engineering; and Science. Postgraduate courses focus on the four areas of: Art Humanities & Social Science; Education & Health Science; Business; and Science & Engineering.

Continuing learning programmes include courses in: HR training and development; Training for research students; Foreign and Irish language courses; and ULearning, which aims to address individual and corporate skills gaps through professional flexible learning provision.

Limerick Institute of Technology also offers a range of courses for undergraduates, postgraduates, apprentice programmes, and lifelong learning/evening classes. Undergraduate courses are delivered in four schools: Art & Design; Built Environment; Business & Humanities; Science, Engineering & ICT.

Postgraduate courses are delivered through eight schools: Applied Science; Art & Design; Built Environment Management; Business; Business, Education & Social Sciences; Electrical & Electronic Engineering; Humanities; Information Technology.

In addition to undergraduate and postgraduate courses LIT offers a wide range of lifelong learning and evening classes in the subject areas of: Applied Science; Art & Design; Built Environment; Business; Education & Social Sciences; Electrical & Electronic Engineering; Humanities; Information Technology; Mechanical & Automobile Engineering; and Technology, Media & Science.

Further to UL and LIT, Mary Immaculate College (MIC) is also located in Limerick. Whilst the main focus of the College is teacher training the College runs a host of initiatives aimed at overcoming educational disadvantage in the wider community and enhancing the participation of under-represented groups in educational programmes. Through the Targeting Educational Disadvantage Project (TED), Mary Immaculate College supports two networks of primary schools that have been designated disadvantaged by the Department of Education & Science. The project facilitates sharing of good practice in tackling issues such as absenteeism, behaviour, progression and exclusion.

A second programme run by the College is the Curriculum Development Unit (CDU), which is a dedicated Centre for Educational Disadvantage Research. The CDU undertakes research into the curriculum and methodology of the primary school and has developed a variety of resources designed to address different forms of educational disadvantage.

Inward Investment

Inward Investment in Ireland is an important source of business stock. Attracting Foreign Direct Investment in Ireland (FDI) is driven by the Industrial Development Agency (IDA). The IDA is charged with attracting and maximising the impact of FDI, in order to bring new employment opportunities and build a world class economy in Ireland.

IDA Ireland has deliberately pursued a policy of 'clustering' businesses. The Galway Region has been the focus of FDI in medical technologies and pharmaceuticals; Cork has been the focus of pharmaceuticals and drug manufacturing and Dublin has been the focus of IT companies such as Google, Microsoft and Yahoo!. Despite the economic downturn these industries have remained relatively resilient, mainly as a result of their long-term investment horizons, which focus on R&D.

Conversely, Limerick had been the focus of FDI in IT Manufacturing. As an industry this has constantly shifted towards lower-cost locations, most recently in Eastern Europe and the Far East, and this has been to the detriment of Limerick which had seen its costs rise prior to the recession.

As of 2008, there were 53 IDA supported companies operating in the Mid-West Region, employing 10,242 people (Forfas Employment Survey 2008). Most of these businesses were located in Limerick City Environs and Shannon. Of IDA employment in the Mid-West Region, 43% has been in the ICT sector, 25% in Globally Traded Businesses, 21% in Life Sciences and 11% in Medical Technologies.

Across Ireland the Mid-West has been the worst performing region with regard to change in the number of IDA supported jobs between 2006 and 2010. For the Mid-West the number of jobs has declined by 38.5% compared to a decline of 9.5% for Ireland as a whole. Table 13 below presents the real change in IDA supported jobs in Limerick between 2007 and 2011.

Table 13: IDA Ireland Jobs Created and Lost in Limerick from 2007 to 2011

	2007	2008	2009	2010	2011
No. of Companies	43	44	41	41	44
Permanent Employment	9,040	8,634	6,287	6,022	6,131
Gross Gains (New Jobs)	298	288	172	163	242
Net Change in Other Jobs	208	-1,311	-320	141	0
Job Losses	-452	-694	-2,519	-428	-133
Net IDA Jobs	**54**	**-1,717**	**-2,667**	**-124**	**109**

Source: http://www.rte.ie/news/2012/0130/ida.pdf

Since the depths of the recession in 2008/09 the IDA has had success in attracting FDI back to Ireland. However, FDI arriving in the country has not been evenly distributed and the target of 50% of FDI locating outside Dublin or Cork has not been met. Figure 3 shows the net change in IDA Jobs for selected areas between 2007 and 2011. Whilst the change in IDA supported jobs was almost zero in 2007 there was a significant decline in 2008 and 2009. Since the Irish economy began to recover in

2010 Limerick has missed out on any FDI inflows, which seem to have favoured Dublin, Cork and Galway.

In the first quarter of 2012 the IDA attracted 3,097 jobs to Ireland, of which only 32 (1.03%) were located in Limerick. This compares to 2,150 jobs to the Dublin/Dundalk area, which is almost 70% of all FDI employment attracted to Ireland in this period.

Figure 3 IDA Job Change 2007 - 2011

Source: http://www.rte.ie/news/2012/0130/ida.pdf
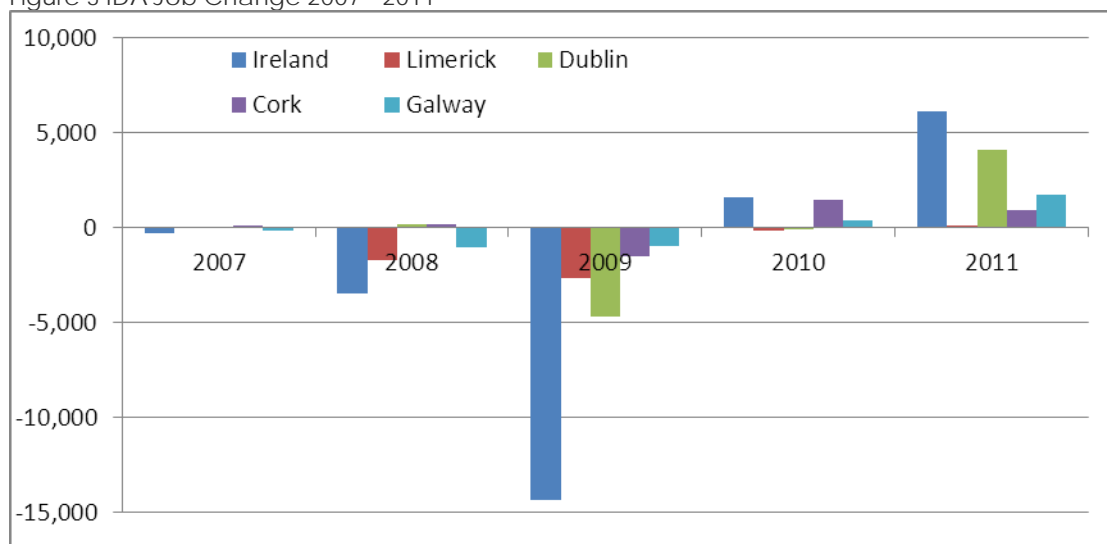
GVA and Income

Limerick (City and County combined) is widely recognised as one of the more deprived areas of Ireland and in recent years this has been compounded by significant job losses. Both the Mid-West Region and Limerick continue to struggle with relatively high levels of unemployment, in particular long-term unemployment and unemployment amongst those under the age of 25.

GVA data for 2010 show that the Mid-West is underperforming the State as a whole by around €4,239 per head per year. Given the population of the Mid-West, the region lost Gross Value Added (GVA) totals €1.53 million annually. Looking at sectoral GVA across the Mid-West and the State it is clear that the Mid-West economy leans more towards primary industries of agriculture, forestry and fishing rather than services (market and non-market).

Table 14: GVA per Person and by Sector for Mid-West and State – 2010

	Mid-West	State	Mid-West as % of State
Gross Value Added (GVA) per person at Basic Prices (Euro)	26,678	30,917	86%
GVA at Basic Prices - Agriculture, Forestry and Fishing (Euro Million)	249	2,067	12%
GVA at Basic Prices - Manufacturing, Building and Construction (Euro Million)	3,229	37,226	8.7%
GVA at Basic Prices, - Market and Non Market Services (Euro Million)	6,651	102,258	6.5%
Total GVA (Euro Million)	10,087	140,970	-

Source: Ireland Central Statistics Office – Gross Value Added by Region

Whilst the Mid-West does lean towards primary industries and is performing below average across some socio-economic indicators, the experience is not uniform across the region. Limerick outperforms the Mid-West Region in terms of total income per person at €25,552 compared to €24,962. Compared to the State, both the Region and the Limerick area perform poorly in terms of income per head, however, the lower cost of living in Limerick and the Mid-West means that disposable income per person is above the national average in Limerick and only 2% short of the national average at the Mid-West Region level.

Table 15: Relative Income per Capita

Sector	Limerick	Mid-West	State
Total Income per Person (Euro)	25,552	24,962	26,192
Index of Total Income per Person (State=100)	97.6%	95.3%	100%
Disposable Income per Person (Euro)	21,230	20,713	21,356
Index of Disposable Income per Person (State=100) (State=100)	99.4%	97%	100%
Disposable Income per Person (excluding Rent) (Euro)	19,972	19,471	19,877
Index of Disposable Income per Person (excluding Rent) (State=100)	100.5%	98%	100%

Source: Ireland Central Statistics Office – Incomes by Region

Regeneration Areas

Limerick City is the second most disadvantaged local authority area in the country and has been in this position consistently since 1991.[5] Within the City there are four areas (Southside: Southill, Ballincurra Weston; Northside: Moyross, St Marys Park) that have been recognised in the Fitzgerald Report (2007) as being extreme pockets of deprivation. Collectively the four regeneration areas include approximately 3,000 households and have a population of over 10,000 people. Across the areas there are a number of common traits in terms of structural economic deficiencies, extensive social problems, and physical planning.

The structural economic deficiencies in each estate stem from the population lacking the skills and education necessary to take advantage of employment opportunities. Part of the difficulty is attitudinal, related to confidence and also expectations to advance beyond a situation of welfare dependence. For some residents it has been noted that welfare is no longer a safety net but a way of life.

The populations of the three regeneration areas are also characterised by extensive social problems. These are generally reflected in the poor education levels attained by children, the high proportion of female headed households and a high number of young people that struggle to engage with other young people and who experience difficulties with wider social engagement.

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[5] Limerick Regeneration - http://www.limerickregeneration.ie/wp-content/uploads/2009/02/Social_Regeneration.pdf

Finally, the planning and design quality of the estates is also a recognised issue which continues to have a negative impact on residents. The estates tend to be physically isolated from the City, the overall design is of poor quality and the built environment is deteriorating.

As a consequence of the deprivation in these areas there is a culture of poverty, unemployment and welfare dependency, which has lead to the areas having a poor external image and a reputation for high crime. The major social, economic and physical issues apparent in each of the regeneration areas have been detailed below:

Southill

Southill is an area in the south of Limerick City, consisting of four residential parks: O'Malley Park, Keyes Park, Kincora Park, and Carew Park with a total number of 1,120 houses. In Southill houses were built on the Radburn layout whereby houses face onto open greens and vehicle access is via back courts. Subsequently back courts have become a security issue. The large scale of the estate with uniform design, large poorly landscaped open space, high concentrations of children living in relative poverty, degradation of the environment and anti-social behaviour are issues for this area.

Ballinacurra Weston

Ballinacurra Weston is also located in southern Limerick City and is made up of three estates: Clarina, Crecora and Beechgrove. Collectively the three estates in Ballinacurra Weston amount to around 200 houses.

There is significant educational disadvantage within Ballinacurra Weston and this has been identified as one of the leading contributors to social deprivation in the estate. It has been noted that education provision is not the entire problem and that some parents, guardians and children are afraid to approach school gates due to threats, hostilities and family feuding.

Poor health is also an issue across the estates in Ballinacurra Weston and issues include severe substance addiction, malnourished children and families that need extensive support in order to raise their children.

Moyross

Moyross is located in the north of Limerick City and was built between 1973 and 1987. The estate comprises 1,160 houses and has a population of around 3,500 people. In 2006 64% of households in Moyross were headed by lone parents. There are also a number of underlying social problems that have made it difficult to attract new residents to live in the area, even the newly regenerated properties.

With regard to physical planning, Moyross was designed with no mixed use and too much open space that has been poorly landscaped. In particular, there were no retail outlets on the estate, no

coffee shops and no public house. In order to overcome this, a number of houses have been adapted to accommodate shops but due to the nature of social conflicts in the area retail units needed to be protected by steel grills. In 2005, a retail development and library were established along with a number of small enterprise units.

St Mary's Park

The area of St Mary's Park is located on the northern half of King's Island to the north of the City. St Mary's Park currently consists of 463 houses, of which 273 (59%) are privately owned, and 190 (41%) are local authority owned. The location of St Mary's Park is initially positive as it is in the heart of the old city; however, the physical planning of St Mary's Park and its location on an island means that it is physically cut-off from the rest of the City.

In addition to its isolation, the area suffers from a pattern of inter-generational male unemployment. Unemployment has been fuelled by historic factors, namely:

1. No replacement employment as traditional industries closed that existed in close proximity
2. Low education and skill levels
3. Lack of physical mobility within the population

Combining the above factors St Mary's Park has been characterised as having a 'culture of poverty, unemployment, welfare dependence and poor external image'.

Regeneration Delivery

The Limerick Regeneration Agency was established on the 15th June 2007, with the remit to oversee the planning and implementation of a comprehensive and integrated regeneration programme for both the Northside and Southside of Limerick City. On the 15th of July 2012 The Limerick Regeneration Agency was deemed to have run its course and its staff and resources were transferred to the Home & Community Directorate, which sits within the new Limerick Local Authorities.

In addition to the restructure of regeneration delivery in Limerick the economic difficulties in Ireland have reduced resource availability. This has had implications on the deliverability of previously planned works and the physical masterplans for each of the estates are being revised in-order to prioritise key physical changes. Planned social and economic developments within the regeneration areas are still thought to be robust and deliverable, although it is likely that these will be reviewed at some point during the autumn of 2012.

Local Heroes

A further regeneration initiative in Limerick is 'Limerick Local Heroes'. Supported by RTE, Limerick Local Heroes (LLH) aims to motivate the citizens of Limerick to get involved in affecting positive change in

the City by taking ownership and responsibility for its future. LLH is based in Arthur's Quay Shopping Centre and channels its work around four key pillars:

- Retail: The key aim of this pillar is to encourage retailers to work together in-order to create footfall in the City Centre.

- Tourism: The key aim of this pillar is to spread awareness of Limerick's capacity to be a central hub for tourist activity.

- 3e's (Enterprise, Employment and Education): The key aim of this pillar is to be a conduit or facilitator to help people find the education, employment and business support provision that they need.

- Community: The community pillar is a group dedicated to supporting projects that bring people together in a positive, socially beneficial way.

It is not the intention of LLH to reinvent the wheel, rather their objective is to act as a conduit between existing bodies and agencies in Limerick who are already actively engaged in positive initiatives for the City. Local Heroes is currently in its early stages but it has held a number of public meetings, out of which emerged the four pillars as stated above.

The knowledge Economy and Innovation

There are a wide range of organisations across Limerick City and County that are actively involved in R&D and Innovation. This section explores the key organisations and research areas.

The University of Limerick is recognised as an established and leading provider of education and skills. Links between UL and businesses are therefore very important to delivering the skills the economy needs and currently lacks. In addition to skills provision, the University of Limerick is also an important source of innovation and is adjacent to the National Technology Park, where over 3,000 skilled and highly qualified personnel are employed on site working mainly in ICT, materials, medi-tech and e-business related activities. The University has established a Knowledge Transfer (KT) Strategy that seeks to share innovations that will advance the economic, educational and social development of the region. A specific focus of the KT Strategy is technology transfer and commercialisation of intellectual property. As part of the strategy, the University of Limerick is home to the Nexus Innovation Centre, where a growing community of international entrepreneurs and start-up businesses are located on the University of Limerick campus. The ambitions of the Centre are to both accelerate the development of innovative business start-ups and to commercialise academic research.

The University of Limerick Foundation was set-up in 1989 as a research commercialisations initiative with Bank of Ireland. The Foundation has €32m available to invest in and stimulate the growth of high potential start-up companies including research-based spin offs.

The University of Limerick has a strong reputation as Ireland's leading university research & innovation in industry-led research, and in particular in the areas of:

- Materials & Surface Science: Composite materials; nano-materials; solid-state pharmaceutical materials; catalysis and clean technologies; and bio-mimetic materials.

- Information and Communication Technologies: Software engineering; telecommunications and networks; and energy efficiency and thermal energy systems.

- Bioengineering & Biosciences: Micro-fluidics and biomedical engineering.

- Culture, Diversity and Social Change: Social identities; class, ethnicity and gender inequalities; historical processes; comparative literatures; law-in-action; and public policy and democratic performance.

- Energy: Biomass and biofuels; materials for energy; energy storage and generation; and evaluation and support of energy systems.

- Applied Mathematical Sciences: Mathematical modelling of fundamental problems in science, engineering and industry; and financial mathematics.

Limerick Institute of Technology hosts a number of programmes designed to enhance and encourage innovation in business and these are explored in detail in the business support section. LIT also has a strong innovation focus amongst its students and awards an 'Active Leadership in Enterprise Bursary' of €50,000 each year to LIT students with a strong business idea.

The LIT Research & Development Strategy identifies a number of key topic areas in which LIT resources are focused and these include:

- Biotechnology or Consumer Foods

- Renewable Energy Control Systems

- New Technology in Construction

- Internationally Traded Services

- Art and Design

Within these key research areas and in other identified opportunities, LIT is constantly seeking to develop spin-out companies through the commercialisation of research.

A further public sector organisation involved in innovation in Limerick is Enterprise Ireland (EI), which runs a range of programmes designed to promote innovation and commercialisation of research. Across the State in 2010, EI assisted ten businesses formed as a result of spin-outs from third level colleges and the EI continues to assist in the development of a number of new businesses each year. EI has supported the commercialisation of research through the Technology Transfer Office (TTO) at the University of Limerick. Since 2000, the TTO has supported over 80 separate projects including a number of notable company formations:

- Stokes Bio Ltd: Dedicated to development and application of microfluidic technology for genetic analysis, particularly gene expression measurement and gene target detection.

- Powervation Ltd: Delivers energy-efficient solutions for power systems used in Networking, Storage and Computing applications.

- Crescent Diagnostics Ltd: Is developing a new prognostic test for hip fracture risk that analyses toe nail proteins and estimates bone health.

Further to the range of education institutions and EI supported companies undertaking R&D in Limerick there are also a number of businesses in ICT, medical technologies and advanced manufacturing that have strong inter-linkages and a R&D focus. A selection is shown below.

Table 16: Limerick based companies with strong inter-linkages and a R&D focus

Sector	R&D Specialism's	Business
ICT	- Computer manufacture and assembly	- Analog Devices - ON Semiconductors - Dell Products
	- Consultancy services & e-commerce	- Channel Advisor - Martin Dawes Systems
	- Hardware and software development	- AR Europs - FEASA Enterprise Ltd. - Intel Ireland - Digital River - Rovsing - Beta Layout - Mentor Graphics - Tecnomen - RSA Security
High-Tech Manufacturing	- Electronics and optical equipment	- Curran Aluminium - OMC Scientific Engineering - Methode Ireland - Litho Circuits Ltd - B.S & B Safety Systems
	- Machinery valves and power systems	- Rettig Ireland Ltd.
	- Aerospace and precision engineering	- SES - Aldous & Parc Aviation - AerCap

Life Sciences	- Orthopaedic implants	- Stryker Howmedica Osteonics
	- Medical technology (optical & endoscopic products)	- AR Europe - Imosphere - Cook Ireland Ltd - Vistakon
	- Medical filters	- Filterek BV
	- Pharmaceuticals	- Schwarz Pharma - Reagecon Group - Zimer Orthopedics Manufacturing

Business Support

The current business support structure for business in Limerick is laid out below. In-order to provide clarity the nature of support has been segregated by the size of the business it is aiming to support: micro/small, small medium enterprise and large/multi-national. There are a large number of organisations providing business support but the main ones include:

- Limerick City & County Councils (incorporating Local Enterprise Office in Business Support Unit)

- Enterprise Ireland

- IDA Ireland

- Limerick Chamber of Commerce

- Limerick Institute of Technology

- The University of Limerick

A full list of all business supports available in Limerick is included in Table 17 which summarises the main support and programmes available to businesses by the size of the business targeted. There is a vast amount of business supports available to businesses in Limerick, however this can make finding the correct support and the correct support provider a challenging process a point reinforced by stakeholder feedback.

A number of changes are occurring regarding the provision of business support in Limerick. One of the more significant changes is the absorption of Limerick City Enterprise Board and Limerick County Enterprise Board into the new local authority under the banner of Local Enterprise Office in mid 2013. The 'Future Delivery Body' column in the table identifies the future providers of each business support.

Table 17: Business Supports available

Size of Business	Nature of Provision	Delivery Organisation	Future Delivery Body
Micro and Small Businesses	Training courses	- Limerick City Enterprise Board - Limerick County Enterprise Board - Limerick Chamber - Limerick Institute of Technology	- Local Enterprise Office (LEO) - Limerick Chamber - Limerick Institute of Technology
	Innovation grants	- Limerick City Enterprise Board - Limerick County Enterprise Board - Enterprise Ireland	- Local Enterprise Office (LEO) - Enterprise Ireland
	Mentoring	- Limerick City Enterprise Board - Limerick County Enterprise Board - Enterprise Ireland - Limerick Institute of Technology	- Local Enterprise Office (LEO) - Enterprise Ireland - Limerick Institute of Technology
	Expansion grants	- Limerick City Enterprise Board - Limerick County Enterprise Board - Enterprise Ireland	- Local Enterprise Office (LEO) - Enterprise Ireland
	Business planning	- Limerick City Enterprise Board - Limerick County Enterprise Board - Enterprise Ireland - Limerick Institute of Technology	- Local Enterprise Office (LEO) - Enterprise Ireland - Limerick Institute of Technology
	HR support	- Limerick Chamber	- Limerick Chamber
	Export support	- Limerick County Enterprise Board - Limerick Chamber	- Local Enterprise Office (LEO) - Limerick Chamber
	Translation support	- Limerick Chamber	- Limerick Chamber
	Incubation units	- Limerick Institute of Technology - University of Limerick	- Limerick Institute of Technology - University of Limerick
SME's	Training courses	- Limerick City Enterprise Board - Limerick County Enterprise Board - Enterprise Ireland	- Local Enterprise Office (LEO) - Enterprise Ireland
	Mentoring	- Limerick City Enterprise Board - Limerick County Enterprise Board - Enterprise Ireland	- Local Enterprise Office (LEO) - Enterprise Ireland
	Technical assistance for business expansion	- Limerick County Enterprise Board - Enterprise Ireland	- Local Enterprise Office (LEO) - Enterprise Ireland
	Grants and funding for R&D and international expansion	- Limerick City Enterprise Board - Limerick County Enterprise Board - Enterprise Ireland	- Local Enterprise Office (LEO) - Enterprise Ireland
	International growth	- Limerick County Enterprise Board	- Local Enterprise Office (LEO)

Size of Business	Nature of Provision	Delivery Organisation	Future Delivery Body
	support	- Enterprise Ireland	- Enterprise Ireland
	Collaboration matching	- Enterprise Ireland	- Enterprise Ireland
	Franchise start-up support	- Limerick Chamber	- Limerick Chamber
Large Businesses & MNC's (Multi National Companies)	Internationalisation support	- Enterprise Ireland	- Enterprise Ireland
	R&D and market research grants	- Enterprise Ireland - IDA Ireland - Science Foundation Ireland	- Enterprise Ireland - IDA Ireland - Science Foundation Ireland
	Innovation funding and collaboration support	- Enterprise Ireland - IDA Ireland - Science Foundation Ireland	- Enterprise Ireland - IDA Ireland - Science Foundation Ireland
	Business expansion support and funding	- Enterprise Ireland	- Enterprise Ireland

Key Economic Sectors

In this section we have taken those sectors which we expect to make a significant contribution to the growth of the knowledge economy over the next 10-15 years. In this report we have covered:

- Life Sciences

- The Low Carbon Sector (including energy)

- Logistics and Distribution

- Creative and Digital Media

- ICT

- Advanced Manufacturing

- Business and Professional Services

- Sport

For each sector we have looked at the main global market trends, the implications for the Irish and Limerick economies and then at the specific Limerick opportunity. This is an initial overview and we expect to go into more detail on the specific sectoral opportunities in subsequent reports.

Life Sciences

Industry Trends

The Life Science sector is an extremely broad sector that includes an array of activities from R&D to Pharmaceuticals and Machine manufacturing to direct Health Care. This section focuses on the Health Science areas of Pharmaceuticals, Health Biotechnology, Medical Technologies and Functional Foods/Nutraceuticals.

In 2009 it was estimated that the Life Sciences Industry was worth approximately US$1.2 trillion [6] globally. The sector is also identified as a growth sector as a consequence of rising incomes in the developing world and ageing populations requiring greater levels of health care in the developed world. As an industry an annual growth rate of 7% has been predicted although certain segments, such as biopharmaceuticals, convergent products and remote healthcare are forecast to grow at even faster rates.

Innovations that are currently driving the Life Science Industry include diagnostic imaging, simpler medical kits for the home, less invasive treatments, restorative treatments and approaches to early diagnosis of disease that can lead to early intervention. Increased technology convergence is also stimulating more advanced innovations in products and services. Advances in ICT technology including nanotechnologies, micro technologies, 'lab-on-a-chip', bioinformatics and sensors and wireless technologies offer significant potential for the medical devices sector. Manufacturing processes will become increasingly complex in this converged environment coupled with the needs for firms to focus on continuous improvement and increased engagement in R&D in the future.

Ireland and implications for Limerick

Across Ireland in 2009 the Life Science Sector employed in excess of 52,000 people in over 350 enterprises and accounted for 30% of total exports (€44.4 billion). [7] Between 2000 and 2009 exports from the sector grew by approximately 6.3% year on year and it is estimated that for every 100 jobs created in the sector 137 supporting services jobs are created in the Pharmaceuticals Sector and an estimated 62 jobs in the Medical Devices Sector.

Through the University of Limerick's participation in Food for Health Ireland (FHI) UL is the main public sector organisation in Limerick involved in the Life Science Sector. The objectives of FHI are to facilitate the development of the functional food industry in Ireland by creating a new, internationally competitive, interdisciplinary, industry-focused research centre and by developing skills and technologies that will lead to new products, processes and services.

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[6] Health LifeSciences in Ireland – An Enterprise Outlook (October, 2009)

[7] Health Life Sciences in Ireland – An Enterprise Outlook (October, 2009)

Further to UL there are a number of private sector businesses in the Life Sciences. According to Enterprise Ireland 'Life Sciences Directory', Irish companies in Limerick involved in the Life Sciences in 2010 included:

- Chemstore – Design and manufacture hazardous material storage systems for all industries.

- Crescente Diagnostics Ltd. – Developing new prognostic test for hip fracture risk.

- Croom Precision Medical Ltd. – Outsourcing manufacturer of high-quality medical products for the orthopaedic sector.

- Designwise Automation Ltd. – Industry leaders in automation design and consultancy services.

- Firecrest Clinical – Web-based system for running multiple clinical trials and sharing information.

- Fleming Medical Ltd. – Supplier of medical equipment, medical diagnostics and medical consumables.

- Kneat Solutions Ltd. – Supplier of 'good manufacturing practice' to businesses in the life science industry.

- M&Q Packaging – Manufacture and supply heat resistant nylon film for a large range of food and non-food applications.

- New Vistas Healthcare Ltd. – Manufacturer pharmaceuticals

- Serosep Ltd. – Manufacture and distribute a range of laboratory diagnostic products for clinical and environmental laboratories.

- Shannon Microcoil Ltd. – Supply of wire forms for the medical devices sector.

- Takumi Precision Engineering Ltd. – Precision component manufacturer for the medical, aerospace, automotive, chemical and pharmaceutical sectors.

Foreign Direct Investment in Life Sciences investments in Limerick includes:

- Cook Ireland Ltd. – Manufacture and distribute equipment for gastroenterology, urology, obstetrics and gynecology.

- Filtertek BV – Manufacturer of filtration systems.

- Johnson & Johnson Vision – Manufacture a range of health related products.

- Stokes Bio Ltd. – Developer of microfluidic technology.

- Stryker Orthopaedics Limerick – Manufacturer of medical devices.

- Teleflex Medical – Provider of medical devices used in critical care and surgery.

Clearly Limerick already has a base of companies, core skills and research institutes in the Medical Technologies and Medical related ICT Sectors, which are sectors forecast for the strongest growth

the in coming years. Furthermore, Limerick is well positioned between the locations of Galway (with its strong cohort of companies and research capabilities in the areas of Medical Technologies and ICT) and Cork (with complementary capabilities in Pharmaceuticals).

Future Growth

Globally, the pharmaceuticals segment of the industry is expected to grow by 10% per year over the coming years whilst biotech firms and medical devices firms will grow by between 10% and 20% per year. [8] Geographically, the fastest growing market is forecast to be Asia, which will expand much faster than both American and European markets. The American market and the European market are expected to grow but the focus will be on the ageing population and lifestyle related illnesses.

The future of the Life Sciences Sector in Limerick is far from guaranteed. Globally, future funding sources for the Life Sciences Sector is a constant challenge and this has been compounded by the global recession. Indeed, as a consequence of the financial crisis, venture capital funds are finding it harder to raise capital and this in turn means there are fewer funds available for investment in biotech and pharmaceutical companies. [9] In addition, those that are investing in the sector tend to be at later stage opportunities, when risks have been substantially reduced.

Conclusion

There are already a number of businesses in Limerick that focus on medical technology, medical related ICT and manufacturing of medical related products, which are suggested to be the main growth areas of the sector. Limerick also boasts strong research faculties at the UL and LIT as well as a range of funding sources for new business ventures and the commercialisation of research.

Despite the potential that currently exists in Limerick, businesses and organisations need to be able to access funds for further R&D activity. Furthermore, the appropriate facilities for undertaking research must be made available for start-up and established businesses.

Low Carbon Sector

Industry Trends

There is a major transformation under way in energy markets and energy supply that will give rise to opportunities and challenges for Irish enterprises over the coming years. The fundamental impetus for this transformation derives from resource depletion in hydrocarbons and the concerted global approaches being taken to addressing climate change.

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[8] http://www.deloitte.com/assets/Dcom-Global/Local%20Assets/Documents/DTT_Lifesciences_survey.pdf
[9] http://www.morganlewis.com/pubs/PLCCrossBorder_LifeSciencesIndustryTrends_2009-10.pdf

Further to market conditions, the low carbon energy market in the EU is being heavily driven by the 2020 EU targets. The EU commitment is known as the 20-20-20 initiative as it aims to reduce greenhouse gas emissions by 20%, to increase the share of renewables in energy use by 20% and to improve energy efficiency by 20% - all by 2020.

The global environmental goods and services market was estimated to be worth US$700 billion in 2010 and is expecting to exceed US$800 billion by 2015. Asia accounts for 38% of this total, Europe 27% and the Americas 30%. [10] Activities range from the design, manufacture and installation of advanced equipment and infrastructures, project management and engineering services and solutions, operational management of energy assets and infrastructures.

Ireland and implications for Limerick

Compared to other EU Member States, Ireland relies heavily on imported oil and gas. This has raised concerns for energy cost competitiveness and security of supply. However, the country is also relatively rich in wind, wave and tidal energy resources. Given adequate investment in electrical interconnection between Ireland and the rest of Western Europe, it may also be commercially feasible for Ireland to become a major net exporter of clean energy. [11]

Looking at energy usage in Ireland, in 2008 industry and commercial services sectors accounted for 57% of electricity usage. Residential electricity consumption represented 33% and the public sector made up the balance. Whilst there are considerable green house gas reduction opportunities, some will require significant effort to capture. Many of the opportunities to reduce green house gases will require significant innovation that will not be delivered without an aggressive programme of technological development.

In Ireland it has been estimated that by 2015 there will be between 23,350 and 29,000 direct jobs – depending on whether growth rates in the sector are 4-5% or 8-10% per annum. [12] The wider economic conditions and the current economic climate are stimulating businesses to diversify and seek out new areas to develop, where existing skills can be maximised and redeployed.

The Mid-West already has a number of key assets including the highest potential generating capacity of renewable energy in the country and there already exists the power transmission infrastructure and expertise in power generation. UL is home to the largest renewable energy research centre in the State, The Wave Energy Research Centre. The Wave Energy Research Team is based in UL, as is the Charles Parsons Initiative on Energy and Sustainable Environment (CPI). CPI represents a merger of six research centres and 30 researchers at UL, focused on researching the

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[10] http://www.bis.gov.uk/files/file50254.pdf

[11] Ireland's Low-Carbon opportunity: An Analysis of the costs and benefits of reducing greenhouse gas emissions (July, 2009)

[12] Ireland's Low-Carbon opportunity: An Analysis of the costs and benefits of reducing greenhouse gas emissions (July, 2009)

environment and sustainable forms of energy across the areas of electrochemistry, physics, electronic, mechanical and aeronautical engineering, computer science, maths & statistics.

Future Growth

Limerick has potential to exploit new technologies that are rising out of the low carbon energy movement. Sustainable Energy Ireland's report "Tidal and Current Energy Resources in Ireland" states that the majority of Ireland's tidal power potential lies on the west coast of Ireland, with the most potential concentrated in the Shannon Estuary. Estimates indicate an economic return of a mere 8% for a 20 year tidal energy project that would provide 2% of future predicted needs. However, with further technological advancements, tidal energy may yet prove to be a crucial component of Ireland's renewable generation portfolio in the future due to its high predictability of peak and trough generation.

ResourceKraft, based in UL, were established in 2007 and have developed their own technology driven solution provider, ResourceKraftAdvisor. The company is a world leader in energy management and energy cost control software. In April 2010 the Bank of Ireland Seed and Early Equity Fund along with Enterprise Ireland provided an investment of €600,000 to the company to support the recruitment of skilled staff and to expand market coverage beyond Ireland and the UK. This offers a clear example of the type of business that can drive the low carbon sector of the economy in Limerick.

Conclusion

Globally the low Carbon Energy Industry will continue to experience strong growth and as a result of its natural assets and strong research capabilities at UL, Limerick has real potential in this sector. The priority will be to provide the appropriate finance and market conditions that will allow the technology with the greatest potential to succeed. This may be best pursued at the Mid-West regional level rather than just in Limerick.

Logistics and Distribution

Industry Trends

The logistics sector has an impact on everything we do and rely on, but the industry has come under significant pressure during the recent recession. With margins being squeezed as a result of weak business volumes and higher input costs, many businesses have looked for ways to reduce costs. Adding to the industry's challenges has been the volatility of fuel prices and the overall trend of a rising fuel price.

With margins as tight as they have ever been, innovation is seen as one source of increasing profits. Continuing consolidation and collaboration are likely to be key for the sector with economies of

scale becoming increasingly important. Innovations are coming in the form of new and high quality management techniques that squeeze maximum value from each asset. As such, innovations are not radical but instead are incremental and iterative with constant small changes and improvements rather than attempting to achieve wholesale transformation. Other innovations include offering customers zero-carbon shipping options and the opportunity to off-set carbon emissions.

Further innovation comes in the form of Supply Chain Management (SCM), which encompasses the management of activities across the entire supply chain from product design, operations planning, procurement, inventory management, manufacturing and logistics. It covers the management of materials, information and fund flows and has a broad scope that includes sub-suppliers, suppliers, internal operations, trade customers and end-users. Companies in Ireland can develop and manufacture higher margin products, or engage in process design and pilot manufacturing, while at the same time manage the supply process for lower margin goods which may never land in Ireland.

Ireland and implications for Limerick

A 'true' agile logistics hub is based close to large metropolitan areas with large population bases, extensive surface transport options and an accessible and sizeable market. The concept requires that the airport acts as a central business district, around which clusters of aviation linked businesses develop.

In 2004, Shannon Development announced plans to develop an 'agile logistics hub' [13] at Shannon Airport. The logistics hub will integrate air, road, rail and port transport systems capable of delivering goods anywhere in Europe within 48 hours. The plan presented by Shannon Development included:

Transportation: A multimodal interface within the hinterland of the airport combining air, road, rail and sea transport networks, together with the development of proximate transportation/distribution related businesses.

Industrial: Plants should be located within clusters close to distribution companies and transportation infrastructures in order to optimize supply chain flows.

Information technology: Electronic support systems that enable the integration of the industrial and transportation infrastructure.

Future Growth

Because of the scale envisaged to support a 'true' agile logistics hub, the investment required in the region may not be justified in terms of future demand. However, the Mid-West Region has specific

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[13] Forfas Report: Regional Competitiveness Agenda: Realising Potential

assets that could be harnessed to a greater extent. For example, international operators require technical stops on North Atlantic flows. Congestion at competitor airports generate opportunities for Shannon to improve and market cargo handling facilities and to develop a strategy and support services to attract carriers which need to make a technical stop on their way to/from North America. This would increase activities at the airport and provide an attractive resource for companies considering locating in the region.

There are clear strengths in the Mid-West Region that lend the area to becoming an important transport hub. The airport has excellent operational capabilities, no performance limitations and no slots, curfews or noise abatement restrictions. In addition, it has US customs pre-clearance and is awaiting other pre-clearance facilities, considerable land available for development of cargo facilities, both on and near the airport, and there is also an existing traffic base that includes local manufacturing, Food, ICT, Pharmaceuticals and Medical Technologies.

The Shannon Estuary deep-sea port at Foynes also presents an opportunity for the development of a European container transhipment hub. While the Shannon/Foynes Port Company commissioned a report (2012) that suggested prospects are more long-term, it is important that potential for developing this deepwater asset be kept under review particularly in the context of energy related industries.

Conclusion

Limerick already has the underlying infrastructure from which a world class Logistics Industry can be built. However, the City is limited by its domestic demand. Therefore growing this industry needs to focus on supply chain management and Limerick as a technical stop for both cargo and passenger long haul journeys. There is need for further integration between the different transport nodes (air/sea ports, road and rail). Further to this, exports from the economy need to increase in-order for the Logistics Industry to have some domestic driven demand.

Creative and Digital Media

Industry Trends

The Creative and Digital Media Industry is an extremely broad industry and is usually broken down into six segments:

1.   Music composition and production

2.   Film, television and video

3.   Animation and computer games

4.   Writing, publishing and print media

5.   Advertising, graphic design and marketing

6.   Architecture, visual arts and design

This industry is one that is genuinely built on innovation and creativity, is extremely dynamic and the pace of change is phenomenal. Change is being driven by three linked factors:

7.   Consumer behaviour

8.   Technology advances

9.   Business models

As a consequence forecasting the 'next big thing' is extremely challenging. Companies themselves are continuously looking to innovate, through not only knowing what competitors are up to but also engaging with consumers to find out where the next opportunity might arise. The role of Government is not to second guess the market but to provide the appropriate infrastructure for dynamic businesses to succeed. Infrastructure is not just the provision of high-speed broadband but also soft infrastructure such as skills and a positive creative environment that businesses want to be a part of. There are four trends that have been identified as triggers for innovation [14]:

- Digital distribution and shareable content: whilst the pre-broadband era was centred on accumulation of data, the competitive factor today is the amount of data deliverable and shareable in a given time frame e.g. 'Cloud Computing'.

- Enhanced visual experiences: value now depends on the usability of content in terms of user experience.

- Continuous interfaces: The easier it is for a user to access the service/content then the more it is likely to be used e.g. smart phones and tablet computers offer new economic opportunities.

- Distributed/ open production facilities: Production facilities are based where production resources are i.e. capital, financial, cultural.

Ireland and implications for Limerick

The transition to a digital economy is continuing at a rapid pace. The internet, mobile media and social networking has allowed the development of a range of services including location based services, digital content, media services and personalised services that did not previously exist.

Segments of the Creative and Digital Media Industry most specific to Ireland are the 'animation and computer games segment' and the 'advertising, graphic design and marketing segment'. The animation and computer games industry within the Creative Digital and Media sector is one of the fastest growing segments globally. In particular, there has been a massive increase in online games

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[14] CReATE, 'Background Paper on ICT and Creative Industries'

and mobile games segments. A recent report by Shaw & Co [15] found that global internet and mobile advertising spending in 2011 was US$80bn, which is almost 15% of global advertising spend. Forecasting to 2016, internet and mobile advertising is expected to rise to 22% of global spend (US$130bn).

Ireland has not been left out of the strong growth in the Creative and Digital Media industries. There are 2,000 people directly employed in the games industry today and many of the biggest global players are based here. Complementing the games segment of the industry are the animation, film, consumer internet and e-learning activities. The game sector is a pioneer within the broader consumer-internet and emerging digital economy through its fusion of creativity, technology and consumer engagement.

In UL, Limerick City already has a strong provider of education, skills and soft-infrastructure. UL offers a number of courses, including:

- B.Sc. Multimedia and Computer Games Development

- B.Sc. Multimedia, Programming and Design

- B.Eng. Computer Aided Engineering and Design

- B.Sc. Digital Media Design

- B.Sc. Music, Media and Performance Technology

Hard infrastructure is very important to the Creative and Digital Media industries and businesses need to have appropriate facilities and space available to them as well as high speed broadband internet. In analysis undertaken by Akamai, a leading cloud platform provider, Ireland ranked seventh in the world for the speed of the internet and it was estimated that penetration rates were close to 86%. Average internet speeds in Ireland were estimated at 6.8mbps, compared to 17.5mbps in South Korea and 9.1mbps in Japan and Hong Kong. Speeds in the UK and France were comparatively slow at 5.1mbps and 4.1mbps respectively. Whilst it is not currently clear what internet speeds are in Limerick, in April 2012 Eircom announced the roll out of a fibre optic internet network across the City. Once completed households and businesses in Limerick will have access to broadband speeds in excess of 40mbps.

Future Growth

Looking forward, the strong growth in the sector is expected to continue. Forecasts to 2015, show annual online games growth of 14.9% and annual mobile games market growth of 11%. Overall the games sector is expected to grow from US$59.3bn today to US$82.4bn in 2015, which is an annual

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[15] Shaw & Co, 'Technology, Media and Telecoms' Analyst Report

growth rate of 8.2%.[16] Cloud Computing is expected to continue to increase, facilitating ever greater number of freelance workers, distance working and self-employment across all parts of the economy but particularly within the Creative and Digital Media Industry.

Conclusion

For Limerick to attract the most dynamic creative and digital industry workers the City needs to provide an environment in which these people want to live and work. Limerick has an exceptional natural environment that can boast a number of leisure and recreational activities. The City is also home to a number of skill providers that can assist creative and digital media businesses as well as spawn their own enterprises. However, the City does not as yet have the built environment to attract the most footloose and high quality workers. There is a major opportunity for a new City Centre hub in a revitalised and vibrant location.

ICT

Industry Trends

The Information and Communication Technology Sector includes all technologies that are used for the management and communication of information. The ICT sector has been one of the fastest growing sectors globally over the last decade and developments within the industry have been vital to developments in every sector of the economy.

The mobile sector has become the focus of investment in the ICT industry in recent years and with increasing mobile broadband demand, new mobile devices including smart phones and tablet computers, and growth in mobile applications and services, the mobile sector will continue to be at the forefront of innovation and recipient of investment.

Globally, ICT markets are growing rapidly but continue to become increasingly competitive. In 2011, the International Telecommunication Union (ITU) estimated that mobile phone subscriptions totalled 5.3 billion, which included 940 mobile broadband subscriptions.

In addition to the large strides being made in mobile technology, mobile services have also developed rapidly including social media, mobile banking and payment services, and industry specific mobile applications such as mAgri developed in Senegal to help make agriculture value chains more efficient.

The nature of the ICT industry is that previous successes do not guarantee the future and the ingredients of success do not remain the same. Market leaders are being challenged by the growth of companies from the Far East such as Samsung, Huawei and Lenovo, which have high market

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[16] PWC Global Media and Entertainment Outlook 2011-2015

share in rapidly growing emerging markets and can leverage large amounts of investment funds for expansion into more mature markets.

Ireland and implications for Limerick

In mid-2011 there were over 1.63 million broadband subscribers in Ireland, however Ireland still lagged behind the EU and OECD with regard to total fixed broadband take-up which reached 23.3% compared to an EU-27 average of 26.6%. However, Ireland outperforms Europe and the OECD on mobile broadband subscription which has achieved a penetration rate of 47.1% compared to 43.4% for the EU and 41.6% for the OECD.

Whilst penetration rates are important, the quality of broadband is instrumental and for the most high-end ICT companies download speeds of 100mbps are essential. Across the main urban areas of Ireland such speeds are achievable but such speeds are not achievable to date in smaller urban areas and rural areas. Limerick currently has low broadband speeds but these are expected to rise to 40mbps, however this is still some way off the target of 100mbps.

Within the large cities the ICT sector in Ireland is a thriving and growing industry with nine of the top ten global ICT companies maintaining a presence in the country. The economic contribution of the sector is substantial with the ICT industry currently responsible for approximately one third of Ireland's exports by value. In 2009, computer services were responsible for the export of €24,223 million worth of services. According to the Central Statistics Office (CSO), in 2009 €3,951 million worth of computer services were exported from Ireland to the UK. The sector is also currently amongst the top three Irish growth industries, with both indigenous and international companies creating large bases in the country.

The ICT sector is also one of the country's most important employers and at present there are over 75,000 people employed by ICT companies in Ireland. In the ten month period between January and October 2010, 2,500 new jobs were announced in the ICT sector. This was on-top of a net sector employment growth rate of 6% in 2009. There are currently 5,400 ICT enterprises in Ireland, of which 233 are foreign owned.

Future Growth

The future growth of the ICT industry will come from two main areas. The first is on the innovation side to develop ICT products that involve extensive investment in R&D and huge amounts of market research focused on developing the next gadget and technical product. This will include mobile devices with the ability to project holographic images, 4G, advances in the capabilities of tablet computers and biometrics. The second aspect of ICT that is going to see significant growth is in the manufacturing processes used by the industry and the highly automated production of knowledge intensive computer and electrical components.

Conclusion

Limerick has a history of advanced manufacturing and specifically manufacturing in the ICT sector. Building on this existing skills base and collaboration with research and government is integral to advancing this sector and becoming a leader in ICT innovation design and production. The research focus will need to be narrow in-order to maximise the impact of finite resources.

Advanced Manufacturing/Engineering

Industry Trends

Advanced manufacturing describes businesses which use a high level of design or scientific skills to produce technologically complex products and processes. Due to the specialised requirements involved, these are usually goods and associated services of high value. Consequently, the advanced manufacturing industry has significant overlap with a number of other important industries, including ICT, Life Sciences and the Low Carbon Sector.

Techniques in advanced manufacturing are changing rapidly and this has prompted some commentators to proclaim the third industrial revolution. Indeed, a number of remarkable technologies are converging: clever software, novel materials, more dexterous robots, new processes such as 3D printers and a whole range of new web-based services. Mass production is no-longer ubiquitous with large factories filled with low paid workers producing one uniform product. Products can now be produced on mass using advanced machinery or 3D printers and where each product is tailored to the specific requirement of each customer.

The emerging capabilities of the advanced manufacturing industry are also beginning to change supply chains. Companies are no longer outsourcing production to low-wage nations but instead are using few highly skilled engineers to operate almost 100% automated factories within the customer market. Through bringing manufacturing closer to the customer firms are reducing the cost of transport and are able to reduce the time it takes to respond to changing consumer demands. Ultimately, as production technologies advance and composite materials are used more widely the cost of labour as a proportion of final production costs is diminishing.

Ireland and implications for Limerick

Ireland has a history of manufacturing goods for export to the European market. The manufacturing sector has undergone enormous change in the last twenty years. Globalisation, technology advances and competition from emerging market economies has constantly driven down the costs of production.

Despite the highly competitive global environment for manufacturing, Ireland has received in excess of €5bn in FDI since 2007. Increasingly, FDI is focused on product or process development activities

that are at the leading edge of technology and where productivity and creativity are contingent on skills, capability and flexibility of the labour force.

Ireland has adapted to the changing market conditions and many manufacturing facilities have moved up the value chain and include ancillary activities in design and R&D. A number of businesses have linked with UL, which includes the Department of Mechanical and Aeronautical Engineering.

Future Growth

In broad terms the future growth of advanced manufacturing is the continued automation of production that is driven by ever smarter software. Specific developments in the sector will depend on the industry to which they are being applied but manufacturing process advances will range from the genetic modification of viruses for use in batteries to 3D printers making gearboxes for cars.

For Limerick, advanced manufacturing will play an important role in the development and existence of manufacturing industries in the City. Continued development of manufacturing processes will require continued collaboration between business, third level institutions and government institutions.

Conclusion

Advanced manufacturing is beginning to reach a state in which the cost of labour is no-longer a significant factor. Extensive automation of production and the high knowledge content that goes into each product produced and each production process used has meant that employment is less and less on the factory floor.

In order for Limerick to maintain a manufacturing base, skills and innovation are key as are building the linkages between businesses and research institutions. Employment in the advanced manufacturing sector will be in the design and R&D stages as well as downstream in the services and after sales care provided to customers.

Business and Professional Services

Industry Trends

The Business and Professional Services is the largest economic sector in most mature economies and the sector is seen by many as the current and future motor for economic growth and innovation. According to the European Parliament Economic and Scientific Policy Department [17] there are two categories of service, those that are provided direct to customers and those that are provided to other businesses. Services encompassed by the sector are extremely broad and include accountancy, audit, legal services, information technology, property management, architecture,

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[17] European Parliament Economic and Scientific Policy Department: 'New Professional and Business-Related Services Status and Prospects'

advertising and management consultancy. While large companies often have in-house lawyers and accountants, many small and medium-sized companies rely on the services supplied by firms that specialize in these areas, or else outsource the work to contractors. Big global companies will outsource many functions to external suppliers. Management consultancy and services in areas such as architecture, for example, tend to be supplied by external firms or contractors that focus on these areas.

Business and Professional Service firms in developed economies tend to be large sectors and amongst the fastest growing. The diversity of activity within the sector also adds to the wider diversification and thus resilience of an economy.

Ireland and implications for Limerick

The Service Sector in Ireland has grown rapidly over the past two decades and is now a significant part of the Irish economy, accounting for two-thirds of Ireland's workforce and 60% of value added. In addition, the Service Sector in Ireland is also a significant exporter, making Ireland the 10th highest exporter of services in the world. [18]

As employment in manufacturing continues to decline as a proportion of total employment in Ireland, the Service Sector is becoming increasingly dominant and is more and more entwined with other sectors. For example, Service Sector activities within manufacturing companies, including order fulfilment, customer satisfaction, help desk support and logistics are becoming increasingly important.

Ireland and Limerick have long served as the gateway to the EU for North American firms. As shifting global capital flows increase the importance of emerging markets, there is now the need to begin to attract investment from India and the Far East. As the economy in Limerick struggles to find traction the domestic demand for business and professional services will remain depressed. There is therefore a need for the Service Sector in Limerick to look to export a greater quantity and range of its products to customers in growth economies.

Limerick already has a collection of Business and Professional Service firms located in the City and at Shannon Airport. Complementing this, UL offers a number of undergraduate courses in business and the social sciences including:

- Business Studies with a European language

- Economics

- Finance

- Law & Accounting

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[18] http://www.connectingireland.com/ireland-in-anz/industry-sector-profiles/internationally-traded-services.aspx

- Technology Management

- Law Plus

- New Media & English

- Politics & Public Administration

Future Trends

Looking forward there are four identified major industry trends that are likely to impact on the Business and Professional Service Sector in Ireland. They include:

Financial Stability: Professional services firms are likely to have an increasingly important role in promoting sound corporate governance when advising client companies, in both the Financial Services Sector and across the economy as a whole.

Innovation: The constant demand for excellence, fierce global competition, and increasingly demanding customer base is likely to boost the development of innovative products and services.

Headquartering of International Firms: Cities and regions that can provide suitable business environments for regional headquarters are likely to attract other businesses seeking to benefit from the positive economic environment and agglomeration effects.

Connectivity: The pursuit of links and synergies between traditional clusters and emerging markets is becoming increasingly significant to the professional-services sector, offering opportunities for growth and innovation.

Conclusion

Growth in the Business and Professional Service Sector has been depressed in recent years as a result of the global economic crisis. However, the sector is large and diverse and provides a range of key services that are instrumental to the success of other sectors in the economy. Limerick has a number of businesses, both local and global, that are operating out of the City Centre and at Shannon Airport. There is an opportunity to capture further growth in this sector and part of this will be through establishing a new City Centre business location where key elements of the Business and Professional Services Sector can thrive.

Sport

National

The Sports Sector ranges from direct expenditure on participation and supporting sport to the industries of high performance sports engineering and health sciences such as nutrition and physiotherapy.

Sport and sport-related activities contribute significantly to the Irish economy, in the form of household/consumer spending on sport and sport-related goods and services, value-added/GDP and employment supported directly and indirectly across the economy. Sporting activities also contribute to the wider social capital, health and well being of communities.

In Ireland in 2008 the value added of the sports industry totalled €1.8bn. This was split between €353million from commercial sports, €456million from voluntary sports and €824million from commercial non-sports sectors. In terms of employment, there were 38,225 full-time equivalent jobs supported directly and indirectly through sport and sport-related spending in Ireland in 2008.

Nationally, it is estimated that in 2008 the Irish Government invested €618 million in sports through grants, capital investment and other sport related investments. The Government Sector as a whole received a total of €922.4 million in revenues from taxes on sport-supported expenditures and incomes, in addition to revenues from sports facilities, which equates to €1.49 return on every €1.00 invested. [19]

The Limerick Opportunity

In 2011, Limerick was the European City of Sport and is home to Thomond Park and Munster Rugby Club, Limerick GAA at Pairc na nGael, Limerick Racecourse, Limerick Greyhound Stadium, the University Arena, Ireland's only altitude gym and the first Boxing High Performance Unit outside Dublin.

UL runs a number of courses in the health sciences, including sports related courses in:

- Health Informatics

- Psychology & Sociology

- Sport & Exercise Sciences

- Physiotherapy

- Food Science & Health.

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[19] The Irish Sports Council: Assessment of Economic Impact of Sport in Ireland

There are opportunities to take advantage of Limerick's growing reputation as a Sports Location. This will include converting more visitors from sports fans into overnight stays, visits to the City Centre and retail spend. There are clearly many overlaps between efforts to develop Limerick as a Sports Location and improvements to the tourism offer, brand and the City Centre experience including the food and drink offer and evening economy.

4.   Property Market Analysis

General Market Conditions

The Irish Property Market has undergone one of the largest adjustments in its history, indeed an adjustment that is notable on an international scale in its severity and duration. [20] A perfect storm of readily available credit that drove both demand and supply, coupled with a rapidly expanding domestic economy, meant that property prices in all sectors accelerated from the early 1990s until around the second quarter of 2007. The market subsequently crashed as it became clear that supply was significantly exceeding demand and the decrease in the availability of credit hit both developers and occupiers, affecting prices negatively.

There are issues, however, with examining the current state of the Irish Property Market, owing to the lack of a central database of property transactions. Research is disparate and varies in its accuracy, with asking prices often differing from transaction value. Supply is often difficult to quantify as the National Asset Management Agency (NAMA) has had an impact on how and when property is brought to the market, with vendors in some sectors withholding properties until NAMA has released its "stock" in that sector, (e.g. hotel properties).

With GDP and consumer spending still falling, the market is still cautious about investing in property in Ireland, particularly outside of Dublin (indeed, it has been said that the Irish market is extremely disparate and discussions of a Single Market are somewhat futile [21]). However there are signs that there are some small shoots of recovery. Increased lending and the emergence of cash buyers has seen some activity, particularly in the prime areas in Dublin. Lending rates are still low compared to other markets (new lending in the UK, for instance is at 3.9% of housing stock compared to just 0.8% in Ireland [22]). Cash investors are emerging as key players in the market, although anecdotal evidence suggests that smaller investors are being discouraged from investing in the residential market due to the introduction of a comprehensive property tax from July 2013.

What follows is a brief overview of market conditions by sector in Ireland as a whole, in order to provide some context for the Limerick market. The Limerick market can then be examined in detail using what data sets are available. A series of telephone interviews were conducted with local property agents in order to gauge market sentiment and to obtain more accurate figures on prices. Prices may vary due to the non-transparent nature of most transactions.

[20.]Daft.ie 2nd July 2012 reported that the average OECD crash lasts 4.5 years and results in a price drop of 23%; in Ireland the crash has lasted in excess of 5 years and has resulted in a price drop of up to 53%
[21] Mary Finnegan "The Irish Property Market – Where do we go from here?" 02/05/2012
[22] *Ibid*

Residential

The Irish Housing Market is characterised by a strong owner-occupied sector with a predisposition towards family homes (semi-detached and detached). This led to a strong and exponentially increasing demand for such properties throughout the "boom years". Prices in all areas rose rapidly and as apartment type developments came on stream, these were purchased by individuals hoping to get on the property ladder. Since 2007 prices for all types of housing have fallen, with apartment developments being hit hardest. In general, residential prices have fallen some 54% and continue to fall, with the National Property Index down 15.27% year on year in May 2012. The average quarterly fall in prices is in the region of 4.3%.

Figure 4: House Price Index

Sources: Permanent TSB/ESRI House Price Index, ESRI & Permanent TSB; CSO.
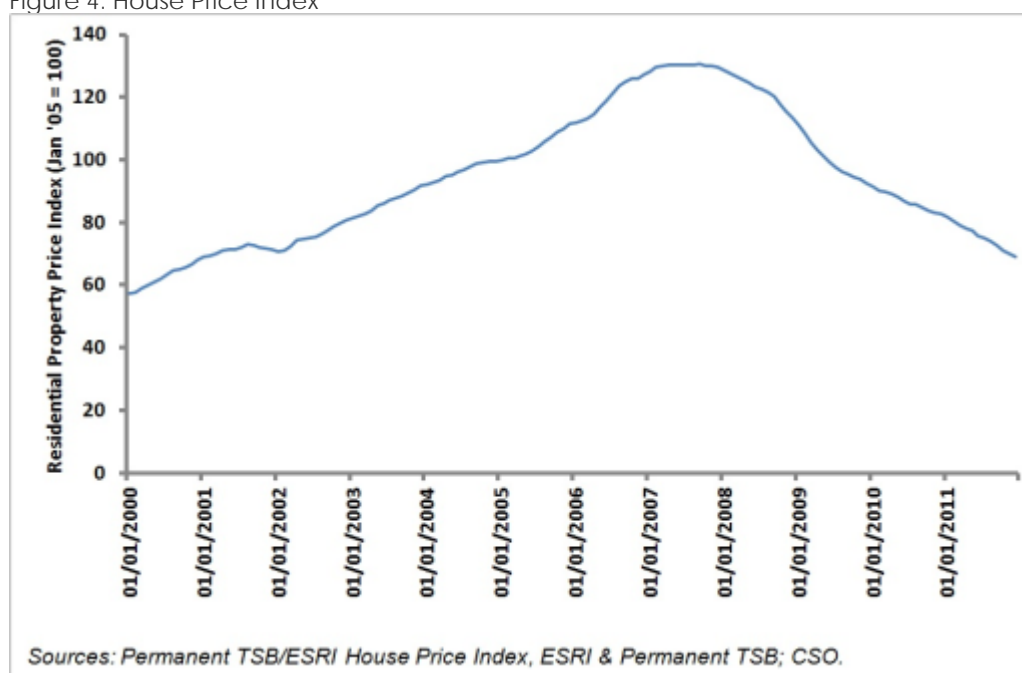
Source: ESRI, 2012

According to the latest report by daft.ie, price disparities between small and large properties have increased, as there is a latent demand for larger family type homes. This is supported by research from the Economic & Social Research Institute (ESRI), which states in its latest Quarterly Economic Commentary that in key urban areas, the stock of vacant houses is not very large. This is particularly the case for houses in the greater Dublin area. A significant increase in demand to buy houses in these urban locations could exhaust the vacant stock and, given a very low level of house-building, this would begin to put upward pressure on prices. [23]

The Census of 2011 showed a continued increase in population, which may point to a latent demand for housing, particularly larger family homes in good locations. Affordability is no longer a problem in absolute terms, but lending is still seen as a barrier to entry into the owner-occupied

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[23] ESRI Quarterly Economic Commentary, Summer 2012

market. The average price for housing outside Dublin is in the region of €149,000 to €162,000, and does not show significant signs of strengthening at present.

Prices are not expected to recover to 2007 levels in the short to medium term. While the Dublin market has started to recover, the same cannot be said for the rest of the country. Excess supply, unsuitable stock in the wrong locations and restrictions on lending mean that sales remain low. A decrease in the levels of immigration coupled with the introduction of a new property tax will keep sales low in the short term.

The ESRI data also show an unusually high proportion of households who are renting today, probably as it is more profitable to rent than to buy in a market that was seen as over-valued and is still in a falling market. [24] There has not been a drop in rents over the period since 2007 that corresponds to the decrease in sale prices, with rents dropping by only 29.4% nationally. Yields have, however, increased from a low of 3.5% in 2007, to 5.5% in 2012 (in all markets). [25] The rental market continues to perform well in light of the current conditions for purchasers.

Retail

There are two aspects to the Retail Market, occupiers and purchasers/investors. Decreasing sales volumes and rising unemployment has impacted on demand for retail space. Prime yields are still at a 10-year high, at 6.45% in the prime Dublin market (compared to 7.85% in Limerick), from the 10-year low of 2.85% (4.0% in Limerick). [26] Prime rents are down across the board, €5,400 on Grafton St. in Dublin, down 3.6%. Limerick has performed most poorly of all the major cities in this regard.

There has been increased interest from international retailers in the Irish market, who have been attracted by favourable rents and improved lease agreements (including substantial rent free periods and short break clause horizons). While rental levels are down, they are still strong when backed by an international retailer.

Investors are wary, however, of many of the factors that are enticing the international retailers. The expected abolition of the upward only rent reviews and the favourable terms that can be negotiated by tenants has meant that only the prime retail locations are being seriously considered. Uptake outside of these areas, therefore, is still poor. Developers are slow to react to latent demand due to problems with obtaining credit. Lending institutions are only lending where there is a significant deposit (anecdotally in excess of 40%) and a secured long-lease tenant.

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[24] ESRI Quarterly Economic Commentary, Summer 2012
[25] Taking Stock of Ireland's Property Market, Five Years into the Crash", Ronan Lyons, Commentary on Daft.ie Report July 2012
[26] Chushmann & Wakefield, "Marketbeat: Ireland Retail Snapshot" Q1 2011

Office

The Office Market in Ireland showed a strong increase in demand in 2011, with a number of large transactions taking place. Again, however, this is largely focussed on Dublin and a number of key occupiers entering the market (e.g. Google). Yields are still at a 10 year high, at around 7.5% in the prime Dublin locations, with Cork at c. 7.85%. Rents in Dublin vary wildly, depending on location, from c.€140-€320 per sq.m. in some locations. Rents in Cork appeared to show positive signs of growth, with rates of €170-€200 per sq.m. expected in good locations. The quality of the stock, the size of the floorplate and the relative prestige of the location are all key determinants on whether a building is occupied. Low spec. fit-outs in off-prime locations are still very weak. Demand is expected to increase in the prime locations owing to an increased take-up of the best stock. Outside of the Dublin market, however, problems still remain.

Industrial

The Irish Industrial Market has shown increased signs of recovery. Although rents have dropped from 2006 levels and yields have continued to increase, the rate of take-ups, while still down year on year, showed signs that the decreases had abated during 2011. [27] Prime rents in the Dublin market in 2011 were at €70/sq.m., down 9.9% on the 5 year high, and yields were at 8.65%, a 10 year high. Domestic demand is strongly increasing, with the export sector leading the way in this regard. FDI take-up is not as strong, with a focus now on office space for this sector of the market. It is, however, a key player in the Industrial Property Market. Leasing preferences in the market tended towards smaller spaces, 400-800 sq.m. as larger unit supply is becoming limited. [28] The supply of larger industrial spaces has been negatively affected by the lack of available credit, as there remains a pipeline of industrial space in extant planning permissions in various locations. Without secured tenants, however, speculative development in this market has halted.

Limerick Market Review

The Limerick Property Market has not performed well over the past few years, much like the rest of the country. A depressed economic outlook meant that there have been relatively few large transactions in the past few years. Problems in compiling data mean that there is a large reliance on anecdotal evidence in certain sectors of the market. City Centre vacancy rates are running at around 17.7% for ground floor commercial premises, with the Office Sector reporting a vacancy rate of around 22% in 2012. A large number of prominent vacant sites stand out in the City Centre, such as the Opera Site and the site of the former Dunnes Stores on Arthur's Quay. There are also a

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[27] Chushmann & Wakefield, "Marketbeat: Ireland Industrial Snapshot" Q1 2011
[28] *Ibid*

number of prominent vacant retail units in the prime retail area of O'Connell Street, Cruises Street and Sarsfield Street.

There are a large number of properties in Limerick in the hands of NAMA, both in the City Centre and on the outskirts, with the body reporting €454 million of assets in Limerick. NAMA has begun to attempt to move on its portfolio, however, and a recent sale of a 2.6 acre site in Castletroy, with planning permission for 8 no. 3-storey units, indicates that there is some interest in development properties provided that they are in the right areas. This is borne out through discussions with local agents who report movement in the residential market for large, family homes in the "right areas", reflecting national trends.

A significant threat to the City Centre commercial property market is the presence of out-of-centre space, in all commercial sectors. This, coupled with a disparate rates system between the City and County Councils (which is seen as "unfair"), means that the out-of-centre locations are more attractive for both investors and occupiers alike. The commercial market in Limerick peaked in 2007/2008 with record take-ups, but this has tailed off rapidly and has yet to fully recover. [29] At present, given the relative construction costs and realistic rents, it does not make any economic sense to develop property in Limerick, particularly in the City Centre.

Limerick- Residential

The residential market in Limerick City is characterised by a large proportion of housing in the City Council area being allocated to social housing. The remaining housing market has stagnated somewhat and the City Council area has been declining in population in the past ten years.

There has been an overall drop in house prices, from the highs of 2007, where prices had risen 240% for new and 350% for second hand homes. Table 18 below highlights the changes in the asking price for houses in Limerick since 2007.

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[29] DTZ, 2012

Table 18: House Prices

Asking Price for a House in Limerick City and County					
Limerick City					
	1 BED	**2 BED**	**3 BED**	**4 BED**	**5 BED**
2007	€188,000	€206,000	€255,000	€325,000	€393,000
2008	N/A	€211,000	€251,000	€303,000	€359,000
2009	€178,000	€193,000	€219,000	€288,000	€389,000
2010	€89,000	€146,000	€197,000	€264,000	€327,000
2011	€92,000	€132,000	€176,000	€236,000	€247,000
2012	€83,000	€119,000	€166,000	€246,000	€264,000
Limerick County					
	1 BED	**2 BED**	**3 BED**	**4 BED**	**5 BED**
2007	N/A	€175,000	€210,000	€318,000	€386,000
2008	€167,000	€191,000	€216,000	€319,000	€408,000
2009	N/A	€159,000	€192,000	€302,000	€344,000
2010	N/A	€148,000	€179,000	€278,000	€352,000
2011	€86,000	€123,000	€151,000	€254,000	€294,000
2012	€75,000	€105,000	€152,000	€242,000	€277,000

Source: Daft.ie

As can be seen, the drop in price has been significant, due to factors affecting the demand side. Anecdotal evidence suggests, however, that transactions are only taking place in sub-urban areas and are being made at prices some 25% below the asking price. There is still an overhang of supply in some areas, with unfinished estates and extant planning permissions, that could meet the short-term demand for housing in the wider City area.

The rental market in Limerick has also fallen, but at a much lower rate than that of the owner-occupied sector.

Table 19: Rental Prices in Limerick City

Rental Prices Limerick City					
	1 BED	**2 BED**	**3 BED**	**4 BED**	**5 BED**
2007	€592	€790	€888	€1,044	€1,132
2008	€592	€816	€939	€1,086	€1,109
2009	€492	€580	€649	€722	€832
2010	€472	€612	€739	€832	€865
2011	€450	€587	€731	€828	€918
2012	€453	€590	€712	€803	€892

Source: Daft.ie

Again, rents remain strong in areas close to the third level institutions and reports from agents suggest that take up is holding at the present time (most likely due to problems in persons entering the owner-occupied sectors). There are significant threats reported to the investor, however, with the smaller investors seeking to exit the market due to the introduction of property taxes.

Table 20: Share of Private rented

	1996	2002	2011
Limerick City	17.4%	14.3%	24.3%
Limerick County	9.0%	8.5%	14.9%

Source: ESRI 2012

The table above highlights the increasing importance of the private rented sector in the Limerick Housing Market. It is important that investors are not dissuaded from entering this market, given its relative strength, which is expected to continue into the short-term. Reports suggest, however, that sentiment is at an all time low in terms of local investors, with one agent reporting that an investor returned the keys to 17 no. properties in the same estate due to increasing costs (including taxes).

Vacancy rates have increased over the past ten years but have stabilised in the more recent past. This is likely to be attributable to the reported lack of development activity since 2009.

Table 21: Limerick Residential Vacancy Rates

	1996	2002	2006	2011
Vacancy Rate Limerick (City and County)	7.9%	8.2%	12.6%	12.3%

Source: ESRI, 2012 [30]

Vacancy by property type	**Apartment**		**House**	
	2006	**2011**	**2006**	**2011**
Limerick City	18.3%	30.8%	14.4%	7.6%
Limerick County	24.8%	27.1%	15.2%	11.9%

Source: ESRI, 2012

It is clear, however, that the majority of vacancies relate to apartment type developments, rather than traditional housing and that this disparity has increased. There is a reluctance in the property market to purchase apartments, either as an investment property or as a permanent residence. This is reflected in the drop in asking prices with one agent reporting that no apartments are selling "to locals" and that the last transaction was in the region of €85,000 for a 2-bed City Centre unit.

Limerick - Retail

The Retail Market in Limerick is underperforming as a whole, with the City Centre in particular suffering. This is due to a number of factors but is generally attributable in the main to the prevalence of out-of-town shopping centres in the area. [31] There are a large number of prime retail units vacant in the City Centre and some of these units have remained vacant for a number of years. The Smyths Toys unit on Henry Street, vacant as a result of the relocation of Smyths to the Childers Road Retail Park, is one such example of a City Centre retailer moving to a suburban location. Vacancy rates in the City Centre are significant with areas such as Sarsfield Street and Cruises Street having notable large vacant units. O'Connell Street also has a number of prime vacant units.

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[30] ESRI Quarterly Economic Commentary – Special Report, Summer 2012
[31] Retail Strategy for the Mid West Region, 2009

Rents in Limerick have fallen dramatically since 2007/2008, where average rents were between €160 and €200 per sq.m., up to highs in excess of €300 per sq.m. (zonal variations apply). While current asking prices in some areas are close to these levels, at between €115 and €160 per sq.m., it is reported that deals are being negotiated at between 50% and 75% of the advertised level. Rents vary substantially depending on the location also, with suburban shopping centres holding their values better than off-prime City Centre locations. The prime City Centre locations are the areas around the junction of Bedford Row, O'Connell Street and Thomas Street (up as far as Catherine Street). The new developments at Bedford Row have provided a much needed lift in this area. Rents in Limerick are performing well below those in the other cities, including smaller cities such as Waterford and Galway. [32]

Commercial rates are repeatedly cited by agents as being a significant barrier to City Centre retail investment. With reports suggesting that in some locations, rates and service charges are equating to the rental value of a property. The chargeable rates for vacant City Centre properties (at half the usual rate) is a contentious issue, and one that may be dissuading investors (no charges currently apply on vacant properties in the County Council area).

The presence of the suburban shopping centres has undermined the City Centre property market and other uses are in the process of suburbanisation also (office uses in particular). Cheaper rents and easier access to the regional road network are attributable factors to this movement of service locations, although the City Centre is still the principal location for such activities.

As identifed by Colliers CRE Limerick's shopping offer is sub-standard compared to other provincial cities – in particular, Galway and Cork. Although the City Centre has two department stores, Brown Thomas and Debenhams, both are too small, and whilst general stores such as Dunnes and Penneys are present, Limerick is missing a number of other key footfall drivers such as TK Maxx and Marks and Spencer. However, despite its relatively strong anchor presence, the overall comparison offer is not particularly broad. One reason for this is the shortage of suitable properties to meet the requirements of these retailers.

Although Galway and Limerick have similar sized markets, Limerick's primary market (or core market) is larger. Limerick should therefore be achieving sales densities at least as high as Galway's, but in practice they are estimated to be 25-30% lower. Compared to Cork City Centre, Limerick's sales densities may be as much as 33-37% lower.

Colliers indicate in 2008 that the football figures for Limerick's prime shopping street, O'Connell Street was on average 3,000 per hour compared to Galway's Shop Street of 5,000 per hour and Cork's St

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[32] 5 year rental performace: Dublin -3.6%, Cork -8.3%, Waterford -15.7%, Galway -9.0%, Limerick -21%; Cushman and Wakefield, 2011

Patrick Street of almost 6,000 per hour. As suggested by Colliers the footfall in Limerick City Centre should be on par with the City Centres of Cork and Galway.

We agree with Colliers conclusion that if redundancy of the City Centre retail stock continues, mainly due to lack of suitability, investment and over provision of retail in the suburbs, it will weaken the overall retail mix, diversity and depth of the retail offer. This will accelerate the deterioration until it reaches the 'tipping point'. The result could be the City Centre shopping imploding on itself as a retail centre of excellence and it could take many years to recover, perhaps never regaining its permier position in the regional hierarchy.

There is an urgent need to attract leading retailers to Limerick City Centre and this requires shop units of a size that leading retailers will demand and require.

Ongoing communications have been held with Marks and Spencers and Penneys as part of this exercise and the feedback will be reported privately.

Limerick - Office

The Office Sector in Limerick has seen some increased activity the past year, with the caveat that the transactions being made are for smaller office types (less than 900 sq.m.), are shorter term lettings and are for fully fitted, modern accommodation. City Centre demand is reportedly relatively strong, accounting for 58% of lettings in 2012, with the Castletroy / National Technology Park accounting for 42%. [33] The issue in the office market is the prevalence of older, unsuitable stock in traditional areas, such as Mallow Street. Given the volume of available space, at 74,000 sq.m., the older stock is competing in a very difficult market. Office rents are said to have come down significantly, although again, it is difficult to gauge the current levels given the closed nature of the transactions. It is estimated that asking prices vary from €100 to €150 per sq.m. (depending on location and quality), down from a peak of €170 per sq.m. Suburban locations are said to be achieving rents of between €80 and €120 per sq.m. Vacancy rates are running at around 22.3% of the total office stock of 305,300 sq.m., with takeup averaging 10,000 sq.m. per annum. [34] Again, there has been no recent development activity in this market and there are some significant office developments vacant or partially vacant.

Limerick - Industrial

The Industrial Market in Limerick has shown signs of activity through 2011 into 2012. DTZ report that of a total stock of 923,100 sq.m., 262,250 sq.m. was currently available (Q2 2012) and the vacancy rate of 28.4% was one that varied year on year (having regard to the nature of the transactions of large

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[33] DTZ, 2012
[34] *ibid*

floorplate areas). [35] The market shows signs of stability in certain locations, with a "healthy" level of space reserved, and continued vacancies in others (such as in the South West of the City). Relatively strong demand remains for modern space on short term lettings. There were almost no outright purchases and no development activity in this sector since 2009. The lack of modern space has resulted in very few of these types of units being unoccupied. Rental levels are said to be around €25-€30 per sq.m.

Conclusion

In respect of the property market in Limerick, a number of key conclusions can be drawn; firstly is the lack of development activity in the market. This is due to a number of factors including decreased demand, lack of development finance, perceived inequalities in local authority rate levels and high risk levels. A number of key development sites around the City Centre remain vacant, with some similar sites located on the edge of the City (e.g. at Parkway). It remains an uneconomic prospect to develop in Limerick City at present.

Limerick is underperforming in terms of achievable rents, even when compared to the other regional cities, which is reflective of occupier confidence in the local market, particularly in the City Centre.

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[35] *ibid*

5.   City Centre Spatial Analysis

The success of any City Centre is determined by a complex interplay of physical, economic and social factors. Our analysis draws upon the wider economic analysis set out in the previous section. The physical appraisal addresses the built environment – buildings, public realm and transport infrastructure. It considers the city fabric from the point of view of what makes an attractive and vibrant City Centre – highlighting the strengths and weaknesses and focussing on the opportunities. Much of the analysis in the City Centre Public Realm Strategy and in the City Centre Strategy (2008) is sound and may be replicated in this document.

Complementing a thematic analysis we examine individual character areas of the City Centre to enable a more detailed, local understanding of how different parts of it are functioning.

Spatial Analysis

Historical Development

Limerick exists due to the River Shannon. The City of Limerick is located at the head of the Shannon Estuary at the point where the counties of Limerick and Clare meet. The City was established originally as a Viking Settlement in the 9th Century, at a strategic crossing point on the River and developed into an important and much fought over military and trading centre.

In 1194 the City fell under the control of the Normans and a large castle was built by King John adjacent to the River Shannon on Kings Island. The City almost doubled in size in the 13th Century and by 1500 the City had developed into two sectors; English Town and Irish Town. English Town was positioned on Kings Island framed by the River Shannon and its tributary, Abbey River, whilst Irish Town was positioned on the South Bank of the Abbey River directly opposite. The sectors were connected by a single bridge giving a distinctive shape which lasted until the middle of the 18th Century.

During the 200 years from 1500 to 1700, Limerick experienced the implications of the dissolution of the monasteries in the 1540's, the remodelling of King John's Castle 1611, the destruction and rebuilding of much of fortifications during the civil wars of the 1640's and later during the Cromwellian Siege of 1651.

During this period the City grew in prominence and new public buildings appeared in English Town during the 17th Century. The buildings included the new exchange on Nicholas Street, built in 1674 and a new custom house on Merchants Quay built in 1683. This period also saw the expansion of the markets in both towns crowned by the building of a new market house in Irish Town in 1673.

The 18th Century in Ireland was a period of considerable stability and economic growth which was replicated in Limerick. The City benefited from strong and stable markets in Europe and North America as it became the marketing centre for the rich agricultural counties of Limerick and Tipperary and as a consequence of its successful port which allowed access to international markets.

It was at this point that Edmund Sexton Pery had such a significant impact upon the City. Pery was responsible for significant expansion of the City through the creation of Newtown Pery to the west and south of Irish Town. Owning land immediately beyond the City walls Pery obtained the right to pursue large scale building outside the City walls which began to be demolished from 1760 onwards. In keeping with Georgian style urban planning Pery put in place a grid style plan for Newtown Pery which was partially implemented between 1769 and the 1850's. By 1874 the plan had been set aside when the idea of a major Georgian Square at Pery Square was finally abandoned.

From 1854 the Irish famine ended the most significant period in the City's growth.

The 20th Century has seen a gradual erosion of this character through large scale shopping and office development, changes of use and the general decline of the Georgian legacy as residents have left the City Centre and the impact of suburban shopping and residential development has been felt.

There are few recent 21st Century developments of significant architectural merit in the City Centre and indeed many have significantly detracted from other characters of the City Centre. This presents an added challenge to the City in the longer term.

Urban Structure

Limerick has the potential to be a great European City. Its most outstanding asset is the quality of its stunning waterfront location and its remaining Medieval and Georgian street and block structure built heritage.

As a consequence of its 18th and 19th Century expansion the City is blessed with many outstanding samples of Georgian domestic and civic architecture and town planning. Combined with the City's special waterfront setting this makes for a City of special character.

Indeed the urban morphology of an urban grid adjoining a more organic and chaotic Medieval street structure with a strong waterfront setting is practically unique. This uniqueness is not fully appreciated, nor taken full advantage of.

The urban structure is strongly influenced by a series of distinct areas:

- The Medieval Quarter – most evident at Kings Island and incorporating King John's Castle and the Nicholas Street and Bishop Street neighbourhood. Nicholas Street provides a central spine for a fine grain neighbourhood grid. The quarter is also defined by Island Road to the east and the Riverfront on all sides to the west.

- Irish Town – with an organic street grid south of the Canal reflecting a series of smaller scale and independent development blocks between the Medieval Quarter and the Georgian Grid. This has been home to a range of commercial activities, including the Granary and the Milk Market. One of the most interesting features is John's Square - a development by Pery in the mid 18th Century prior to embarking upon the development of Newtown Pery.

- The Georgian Grid – to the south of the Abbey River, the City Centre is characterised by a Georgian grid of streets and blocks. Limerick's main central city streets, O'Connell, Henry, Lower Mallow, Roches are key parts of this grid. The grid provides an ordering rigour to the whole area with regular and understandable built forms and a well defined street structure. For many this district is the gateway view of Limerick City Centre, from Shannon Bridge or the Dock Road.

Figure 5: Built From Pattern
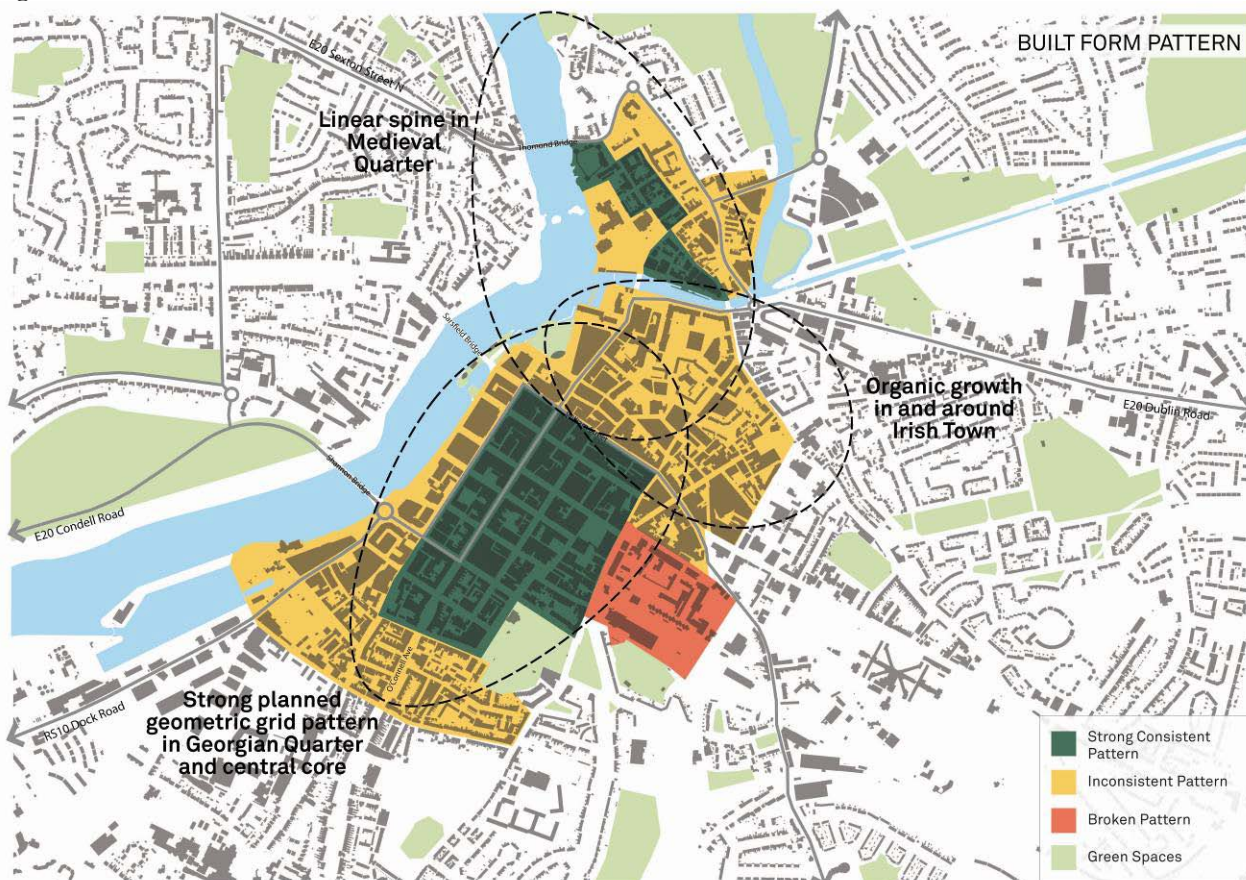
Challenges

The City Centre also faces challenges as a result of its structure.

- The City Centre does not fully engage with the river, while there is a legacy of the industrial and trading character of the riverfront and more recent development, as well as the introduction of the orbital road system;

- The quality of 20th and 21st architecture has been limited in many cases, often out of scale and has often not respected the high quality urban form – especially along the river;

- The area north of Sarsfield Street, encompassing Arthur's Quay, the Potato Market, the Courts and Limerick City Council's offices is fragmented where the traditional structure has been removed;

- The fabric breaks down at the eastern edge and the historic fabric in Irish Town is difficult to navigate through;

- Major vacant sites – including the Opera Site and the former Dunnes Stores Site create large gaps in activity;

Figure 6: Key views & landmarks
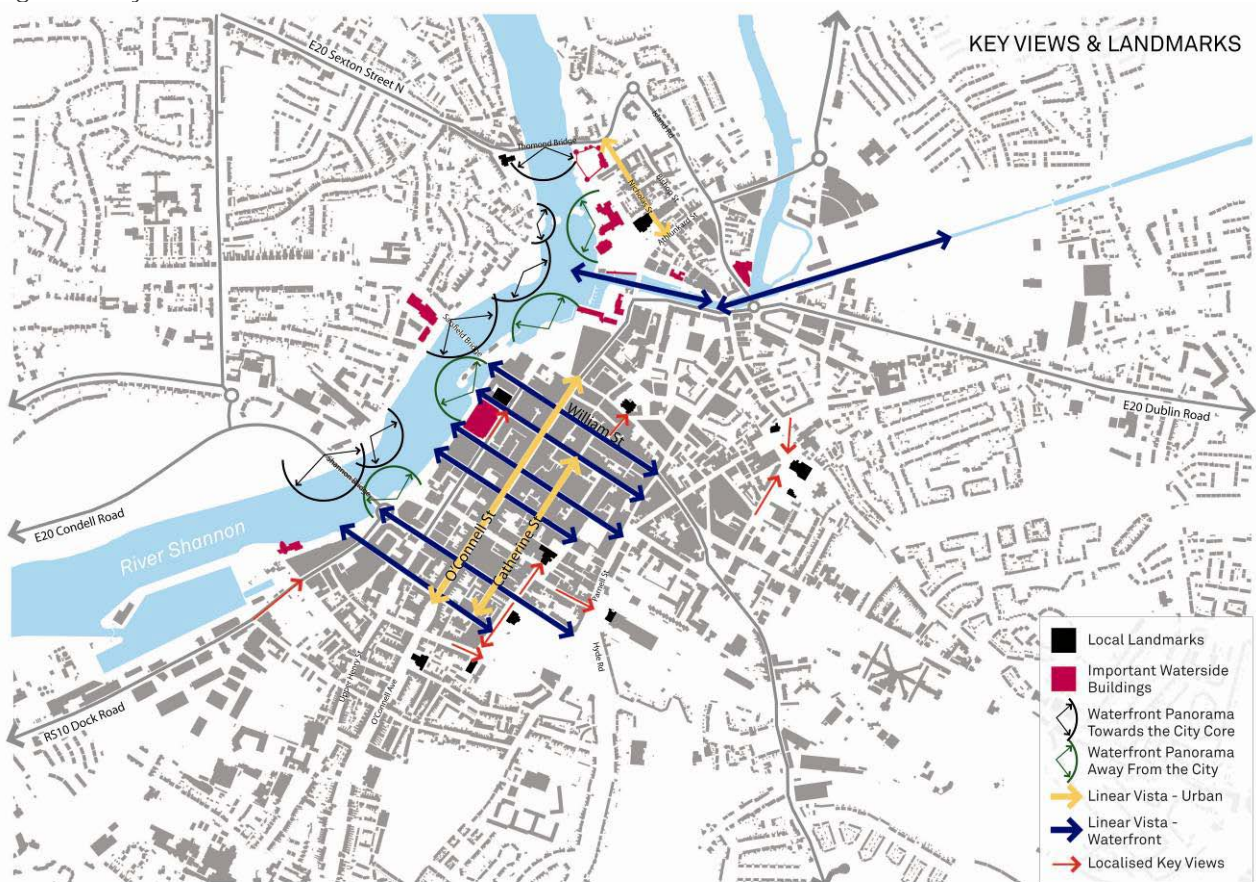
- The whole City Centre needs to be more strongly integrated, offering a more seamless transition for the pedestrian between places of interest and intensity; and

- Historic development has left a limited legacy of public squares and plazas.

Historic Assets

Within Limerick's urban structure there is a series of historic buildings, spaces and districts that provide valuable landmarks and points of orientation for the City Centre.

These include:

- King John's Castle

- Villiers Alms Houses

- Alms Houses off Nicholas Street

- St Mary's Cathedral

- Magistrate's Courts

- The Potato Market

- The Medieval Quarter

- St John's Cathedral

- The Hunt Museum

- The Granary

- The Franciscan Church on Henry Street

- Sarsfield Bridge 1916 Rising Monument

- The Georgian Quarter

- The Crescent and O'Connell Monument – Georgian Quarter

- St. Michael's Church – Pery Square

- Baker Place

- John's Square

Strengths

- Limerick City Centre has a range of historic assets that sit within a historic street and development fabric;

- Landmark buildings are matched by smaller scale late 19th Century and early 20th Century buildings that are in everyday use.

Challenges

- Some large historic buildings are not in full use – notably the Franciscan Church;

- The vacant Opera Site represents a significant void in the historic fabric;

- The extent of the Georgian influence is not fully recognised, particularly its extension along Catherine Street;

- The quality and level of maintenance at the Georgian Quarter and other areas is uneven, undermining the setting;

- The riverfront public realm setting for key assets is weak;

- The historic urban framework and building assets are not presented in a singular way to visitors;

- Many features are not positively linked.

Figure 7: Heritage Assets
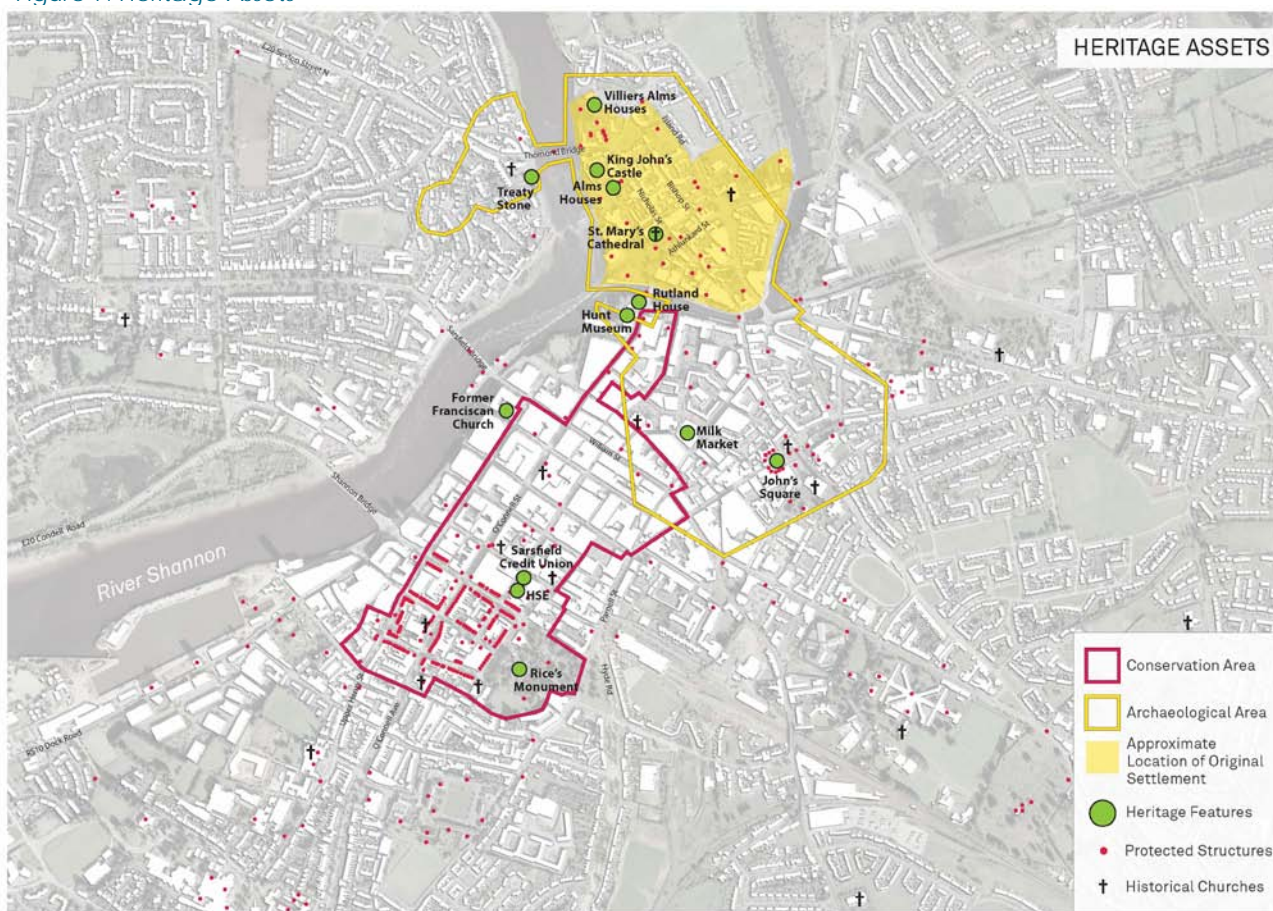
Accessibility/Connectivity/Legibility

In general terms Limerick City Centre is accessible – it is relatively close (20 minutes by car) to Shannon Airport and it has good, high quality motorway connections to Dublin and other cities and a railway station. The "Welcome" is however not as strong. The poor quality of arrival from key gateways is widespread from the lack of recognition at Shannon Airport that Limerick would be a primary point of destination, to the poor quality arrival by road (for example along Dock Road), to the arrival at Colbert Railway Station which makes no attempt to accommodate the visitor nor direct them to key places in the City Centre. This problem is exacerbated by the fact that the station is some distance (relatively) from the heart of the City Centre and there is no clear connecting route.

It is essential for the success for the City Centre to address these first points of contact, creating a welcoming and appealing environment. There is also a need to rationalise traffic routes and to 'put people before vehicles'.

Despite the Georgian legacy of a grid system of wide longitudinal streets, narrower cross streets intertwined by smaller alleys, Limerick City Centre is not as easily navigable as it should be. This is largely a reflection of the attempts to accommodate the car, especially through the implementation of a one way system, a lack of orientating spaces, a number of inappropriate planning decisions and very poor pedestrian signage.

Despite the partial implementation of a public realm strategy which rightly seeks to make the City more pedestrian friendly there is need for a holistic redressing of the balance in the City Centre in favour of the pedestrian, over the car. The approach to achieving this may need to be reconsidered. This may include alternatives to substantial pedestrianisation of the City Centre. It does however mean a balanced consideration of the needs of through traffic, local traffic, public transport provision, essential servicing and first and foremost the needs of the pedestrian – resident, shopper, business person and tourist. Whilst the pedestrainised part of the City Centre has

been extended the bigger issue is to make **all the** key City Centre streets more accommodating to a pedestrian, which means controlling the car and controlling car parking. A series of interim, phaseable approaches may also be required.

Figure 8: Transport & Movement
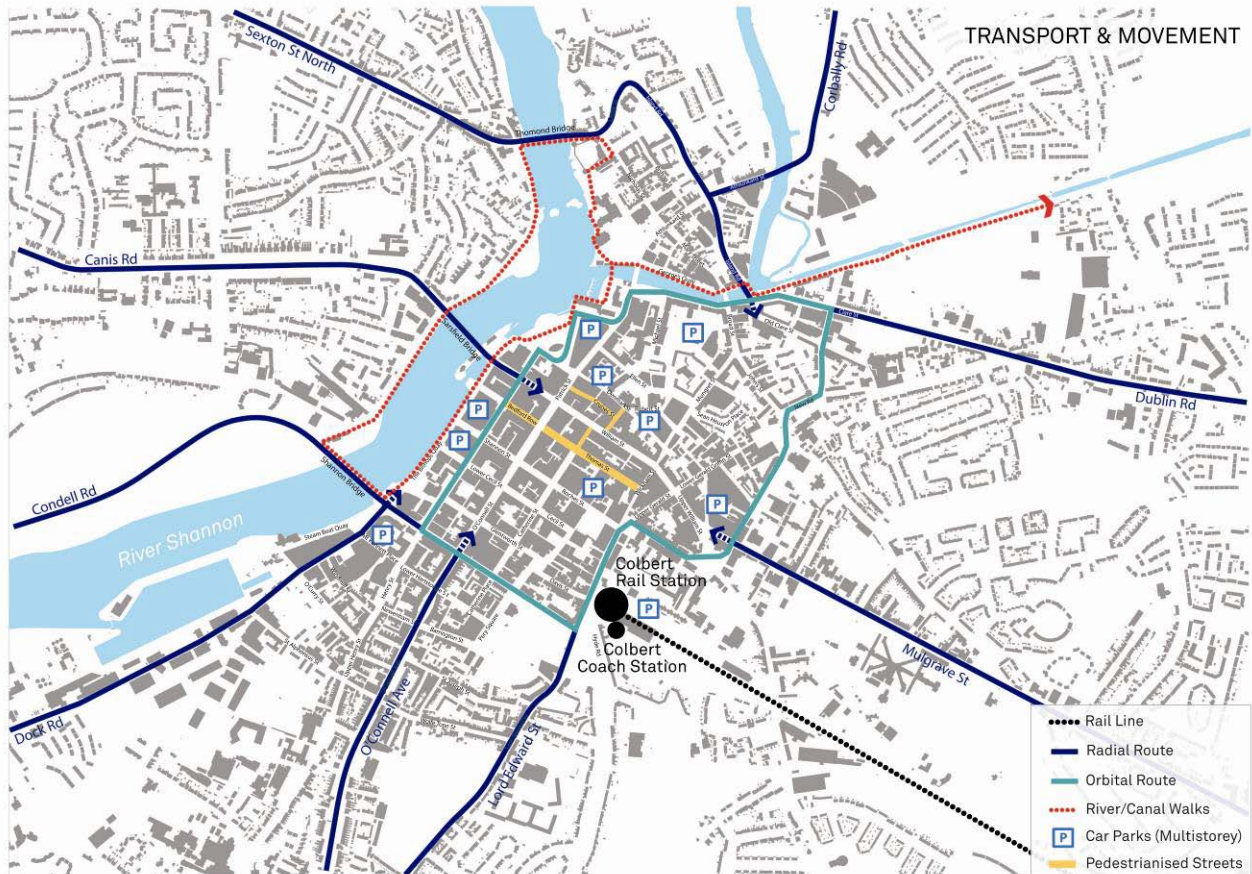
The Orbital Route around the City Centre creates a mainly one-way clockwise traffic system that will be divided into three sections: Northern, Central and Southern.

- The Northern Section travels along: Arthur's Quay, Charlotte's Quay, Clare Street, Saint Lelia Street, New Road and Cathedral Place.

- The Central Section travels along: Sarsfield Street, William Street, Upper William Street, Sexton Street, Roches Street, Shannon Street and Henry Street.

- The Southern Section travels along Parnell Street, Mallow Street and Henry Street.

Unusually for an 'orbital system' this takes traffic through the City Centre, along Henry Street, as opposed to around it, funneling traffic to clear points of congestion in the Arthur's Quay Area. It is generally well accepted that the primary purpose of a one way traffic system is to maximise the through flow of cars and thus as a direct consequence this type of system reduces the quality of the environment for pedestrians. It is decidedly less safe for the pedestrian as traffic tends to move more quickly. In addition the City Centre lacks spaces which offer the pedestrian respite and

opportunities for rest and reflection, and which enable orientation. The overall problem is exacerbated by limited pedestrian and tourist signage in the City Centre.

One consequence of the existing movement strategy is that the riverfront is isolated from the rest of the City Centre by Henry Street, and due to the free flow of cars, the City Centre does not present a particularly appealing environment for either pedestrians or for the creation of waterfront bar and restaurant activity.

Strengths

- Goods access to the City Centre is offered from all directions;

- Bridges provide vistas to the City Centre and waterfront;

- The diversion of freight traffic has improved the traffic and pedestrian conditions;

- The grid system provides a flexible structure for traffic to find a path of least resistance;

- Parking is well provided in a number of locations and capacities are clearly sign-posted;

- The grid system also provides clear vistas and way finding for pedestrians;

- New streetscape schemes have been installed which improve the quality of their immediate environment.

Challenges

- Access and gateway routes can present a weak image of the City for visitors;

- Traffic needs have taken precedence over pedestrian needs on orbital, one-way and through streets;

- There is peak hour traffic congestion at Henry Street / Honan's Quay / Patrick Street / Upper O'Connell Street;

- Big city approaches to streets with multiple one way traffic lanes and bus stops and parking, such as Henry Street, undermine the pedestrian realm;

- Pedestrian way finding between districts and between major destinations is challenged by shifts in the grid, limited pedestrian signage and the most heavily trafficked streets;

- Intersections of one way streets are difficult to cross for pedestrians;

- Pedestrian access to the waterfronts at the River and the Canal are challenged by through traffic routes;

- The quality of the waterfront is challenged by heavy nearby traffic.

Public Realm and Open Space

Recent years have seen a growing awareness across Europe of the importance of high quality public space in generating foot-fall and creating value. For Limerick to succeed in attracting trade back from the out of centre competing schemes it needs to offer a much better and more diverse streetscape encouraging use over a longer part of the day. Improvements have been made in Limerick in recent years through the partial implementation of the public realm strategy, but it is now time for a rethink of the strategy in tandem with wider proposals for business, retail, leisure and tourism renewal.

Limerick City Council has in place a plan to remodel and pedestrianise much of Limerick's Centre including the development of a new Orbital Route - largely in place and aims to still give traffic access to the heart of the City. The aim of this is stated as giving pedestrians priority in the heart of Limerick City and to improve the streetscapes and traffic management. We do not believe that the current regime achieves this, nor represents the optimal system.

Strengths

- The River Shannon, provides an accessible river walk and expansive views of the City and the river corridor;

- The Abbey River and Canal offer more intimate walking experiences;

- The west and east sides of the River are accessible and provide a public realm ring via Thomond, Sarsfield and Shannon Bridges;

- People's Park is a high quality urban park, strong linked to the Limerick City Gallery of Art and providing a place for respite from the City;

- The City Centre is home to a wide variety of walkable streets, with integrated public realm and building characters in the Georgian and Medieval quarters;

- New streetscape schemes have been installed which have improved the public realm;

- The canal corridor provides a direct link to communities on the edge of Limerick and the University of Limerick;

- Baker Place and John's Square are small, but high quality urban squares.

Challenges

- There is an absence of squares and plazas typically found in City Centres;

- The City Centre is still a car dominated centre;

- There is a danger of 'over-designing' the public realm – too much street clutter;

- More thought is required on the choice of materials etc - for example seating that is comfortable for users;

- The pedestrian quality of streets is impacted by road traffic – especially the one-way system and on-street parking;

- The riverfront public realm varies in quality and the pedestrian connections have barriers;

- There is an absence of a connected framework of public spaces and streets that brings the central city districts together;

- Pedestrian density and footfall declines significantly away from the core shopping areas;

- The public realm gateway at the west at Dock Road, the Shannon Bridge and Lower Mallow Street does not reflect the quality found elsewhere.

Figure 9: Public realm & open space

Economic Function

The heart of retail activity in Limerick is focused on the core area of Henry Street, O'Connell Street, Roches Street and William Street. This area is anchored by department stores Brown Thomas and Debenhams and by general stores – including Dunnes Stores and Pennys, as well as Tesco Supermarket at Arthur's Quay. Arthur's Quay shopping centre is the only purpose built shopping centre in the City Centre.

These and other smaller streets are also home to a range of smaller multiples and comparison shopping outlets. There is also a range of traditional local service independent shops arrayed around this core. The Cruises Street shopping development also hosts smaller multiples and comparison shopping outlets. However, it is not a street that meets the store format and size requirements of major multiples.

Cafés and restaurants are found across the City Centre, although most concentrate north of Cecil Street. The transition to Irish Town and the Milk Market area offers a concentration of restaurants, bars and night clubs which represents the core of the night time economy. There are local service and trade counter areas clustered to the north and east around Parnell Street and Wickham Street.

The largest Central City office occupier is the public sector, at the Limerick City Council offices north of the Courts and at Sarsfield House north of Arthur's Quay and the HSE at Catherine Street. There is also a range of smaller office based employers including a range of business services. These are located on Henry and O'Connell Street as well as small business spaces in the core Georgian Quarter. The Granary hosts a range of third sector occupiers. Larger new office buildings were also built in recent years along the waterfront.

A new generation of hotels were also added to Limerick's Central City stock in recent years. There is no identifiable hotel quarter, but the larger hotels are close to the shopping core or close to the riverfront.

Strengths

- Department Stores including Brown Thomas, Debenhams, Dunnes Stores and Penneys, plus a number of multiples;

- Strong independent sector – especially in fashion;

- Small businesses and independents have activated Irish Town, the Milk Market, the Fashion Quarter and the core of the Georgian Quarter – there is an active small business community in the City Centre;

- People come to the City Centre for restaurants and bars as well as shopping;

- The Public Sector provides an office and employment anchor in the central city;

- There is an extensive hotel stock in the City Centre.

Challenges

- The underlying national and sub-regional economy is weak;

- The retail sector is undergoing a major restructuring;

- Challenge of edge of town shopping centres and suburban business parks;

- There are significant and accumulating retail vacancies;

- Many shop units do not meet market requirements;

- There are larger vacant sites at the Opera Site and the former Dunnes Stores Site;

- There has been long running discussion of larger anchor retail development at these sites – failed attempts have tarnished the City image;

- There is a predominance of social housing in the City Centre – edge of City Centre which impacts upon image/perception;

- There are visible office vacancies in new stock, and a general lack of quality stock;

- There is a noticeable absence of higher education activity in the City Centre economic mix and therefore limited student activity;

- Evening safety is perceived to be an issue in some locations.

Arts, Culture, Tourism

Arts and Culture are a significant component of the success of city centres. They contribute directly to the appeal of a city centre for shoppers, employees, employers. They are a major component of the success of a tourism offer. Critically, Limerick has been designated as Ireland's first City of Culture for 2014. While there is a range of strategic issues for Limerick's arts and cultural institutions themselves, the focus here is on the contribution to the City of the Economic Strategy and City Centre Spatial Plan.

Key City Centre arts and cultural institutions include:

- Limerick City Museum

- The Hunt Museum

- The Beltable Arts Centre

- Limerick Printmakers and Gallery

- The Frank McCourt Museum

- Limerick City Gallery of Art

- Limerick School of Art & Design (LSAD) – City Centre

Limerick's higher education institutions make a major contribution to Limerick's wider arts and culture offer at their respective locations beyond the City Centre. Key assets include:

- University of Limerick
    - University Concert Hall

- Irish Academy of World Music and Dance

- Bourn Vincent Gallery

- National Self Portrait Collection of Ireland

- Limerick Institute of Technology

  - Millennium Theatre

- Mary Immaculate College

  - Lime Tree Theatre

Limerick's stadiums also host large scale concerts during summer periods.

Limerick also has an active festival and special events programme, including, but not limited too:

- The Kate O'Brien Weekend

- Fresh Film Festival

- St. Patrick's Day Festival

- Limerick Youth Fest

- Féile Luimní

- L.I.T Film Festival

- Eva International the exhibition of visual+ art

- Riverfest

- May Music in the Park

- Culture Night – with late openings of museums, galleries, theatres, castles and other venues

- Cuisle - Limerick City International Poetry Festival

- Children's Book Festival

- Unfringed - Limerick's Performance Festival

- LGBTG Pride

Strengths

- Limerick has a range of arts and cultural institutions;

- Limerick's cultural leaders include national experts, international experience and a deep commitment to the City;

- Active programming addresses historic, modern and contemporary arts, as well as performance, the visual arts and literature;

- Central City Institutions are actively promoted to visitors;

- Institutions actively reach out to hard to reach City Communities;

Challenges

- There is no visible resident arts community in the City Centre;

- There is no performance space of scale in the City Centre;

- Limerick's outstanding university based arts and cultural activity is not visibly present in the Central City;

- The scale of the City Centre offer has not reached critical mass.

Figure 10: Arts, Culture & Tourism
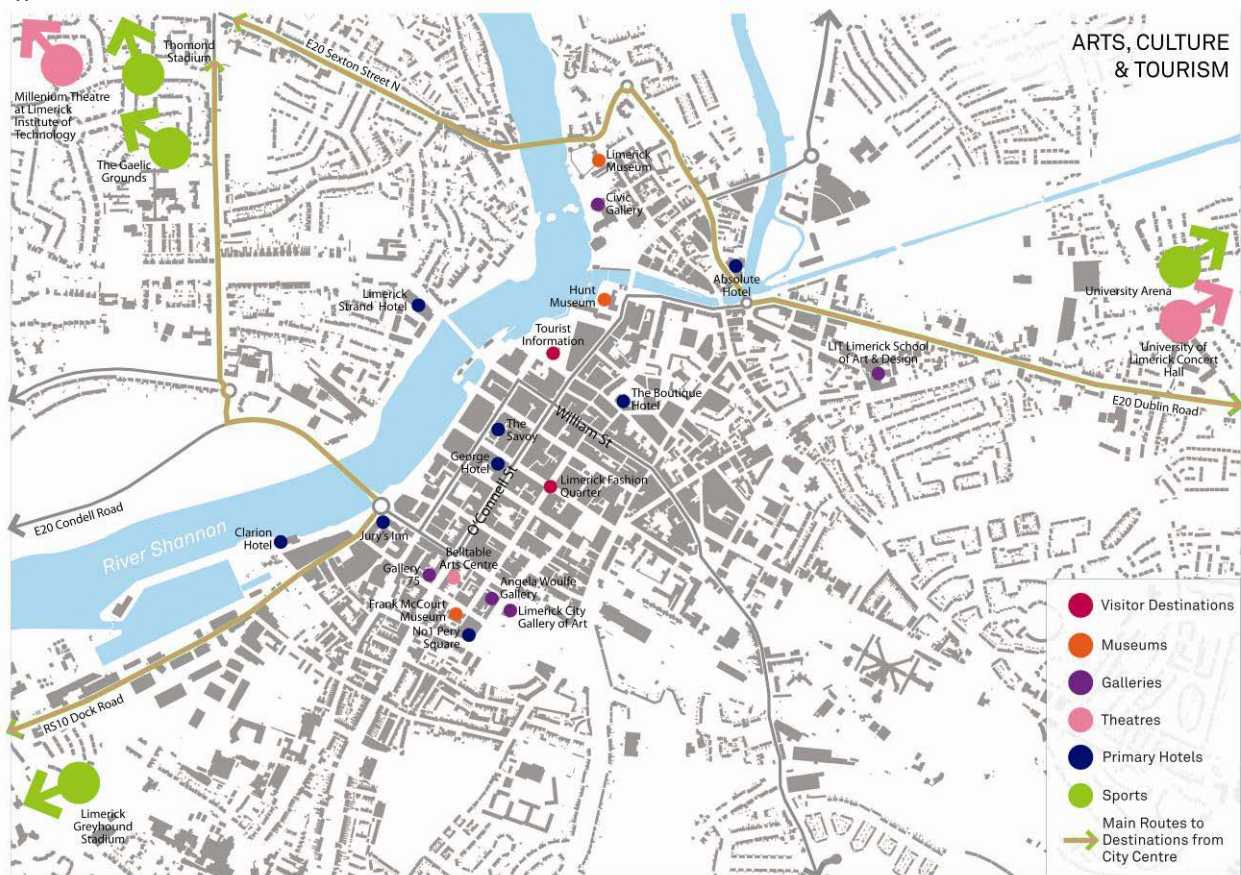
City Centre Zones

A number of distinct character areas have been identified to facilitate more detailed analysis. These are areas characterised by a common use, building type or historical quality. These areas are not definitive in their distinctiveness, but there is enough distinction to aid evaluation and to assist the formulation of interventions and actions. A similar technique was adopted in the City Centre Strategy, (2008) and we build upon this analysis and update it. This is work in progress and detailed analytical plans for these areas will be produced. Further analysis may re-define some of these areas.

The areas we have defined are:

1. The Waterfront

2. Kings Island

3. City Centre Core

4. Main Georgian Area

5. Docklands

6. Eastern Fringes

7. Clare Bank

1. The Waterfront

Limerick's riverfront is one of its most important features. It was the historic city docks dating back to Medieval times, but commercial activity has gradually declined and moved southwards. The Waterfront now lacks function and is no longer psychologically connected to be core of City Centre. It can become the 'front garden' of the City – but this needs a collective approach by addressing buildings and uses, the street, the boardwalk and the pedestrian and vehicle activity together. The solution must put the pedestrian user first and establish the riverfront as a part of City that people are drawn to.

There are few buildings of distinction along the Waterfront – the contemporary buildings are lacking in quality which has detracted from the overall potential, but there is enough quality in the setting to compensate. King John's Castle to the North provides a strong northern anchor, whilst the Clarion Hotel at Steamboat Quay anchors the Waterfront to the South.

At key points there are under developed sites which present redevelopment potential – in particular the Garda Station at Bishops Quay. An appropriate building is required to lift the architectural quality. The transport system that diverts traffic onto Henry Street (one way) creates a significant barrier to the Riverside – this must be addressed. In addition Bishops Quay, Howley's Quay and Harvey's Quay carry traffic that could be accommodated on other streets. The overall ambience for the pedestrian does not do the Waterfront full justice – the area needs to be softened and made more appealing to people on foot.

Finally, there is a need to introduce more active ground floor uses, encouraging pavement activity. These can serve as an attraction in their own right. Indeed this is one area of the City Centre that really could be given over totally to the pedestrian with a more active street environment – including pedestrian activity to enliven the Waterfront.

Table 22: Waterfront

Strengths	Weaknesses
• High quality setting • Attractive views/vistas up and downstream • Potential circuit across both banks around King John Castle	• Poor quality, contemporary development • Traffic dominance • Vacant sites • Limited active ground floor uses and pavement activity • North facing • Relatively harsh environment
Opportunities	
• Redevelopment potential • Green and soften the Waterfront • Activate – ground floor uses / pavement activity • Remove traffic • Improve connections to City Centre • Festivals • Enhance or remove Sarsfield House • Extend Waterfront promenade	

2. Kings Island

Kings Island is the historically most important part of the City Centre, bounded by the River Shannon and Park Canal.

It is Medieval in origin and comprises two of the cities most important historical assets – King John's Castle and St Mary's Cathedral. These two assets are joined by Nicholas Street.

The other notable historic features are the Alms Houses to the south of King John's Castle and the Alms Houses to the north, adjacent to Church Street. There are a number of other listed buildings in the vicinity, and one of the few remaining pieces of the town wall can be found at the junction of Island Road and Castle Street.

Nicholas Street is a main spine road through the area and is flanked on both sides by the range of commercial uses and residential uses. The area has seen public realm improvements in recent years, but is currently suffering from neglect.

A feature of Kings Island is that it is surrounded on all sides by water and there is a pedestrian route around the entire edge of the area.

The area between Matthew Bridge and Ball's Bridge is Georges Quay. This is a potentially attractive stretch of quay with trees fronting the edge of the river with a range of commercial buildings behind.

There is a public square outside the Court House and at the front of the civic buildings known as Merchants Quay. This is flanked to the south by the Potato Market site now used as a car park.

Immediately to the north of the Medieval area is the extensive social housing area, known as St Mary's Park. This is the subject of an intensive regeneration programme to address severe physical and socio economic problems.

The location of the estate tends to give rise to incidents of anti-social behaviour in the area, and exacerbated by the location of the Court House.

Table 23: Kings Island

Strengths	Weaknesses
• King John's Castle • Medieval Character/Heritage • Several other buildings of distinction – Alms Houses • Waterfront – views/vistas	• Presence of the courts • Poor quality environment • Socio-economic problems in adjoining areas • Image / perception • Connection to the core City Centre
Opportunities	
• Relocate the courts • Relocate Limerick City Council offices / redevelopment • Available sites – Potato Market	• Integrated Waterfront promenade • Investment in King John Castle • Upgrade Nicholas Street

Core Area

This area to the immediate south of Abbey River and centred on the intersection of William Street and O'Connell Street is effectively the heart of the City Centre. It retains remnants of its Georgian origins in the form of a number of buildings along Patrick Street, and in particular the Hunt Museum building but much of the remainder of the area is Victorian/20th Century in character, with a number of more recent developments.

The area encompasses the principal shopping streets, namely O'Connell Street, William Street, Cruises Street and Catherine Street, as well as the only purpose built shopping centre in Limerick City Centre – the Arthur's Quay Shopping Centre. The area includes the principal department/general stores in Limerick, including Brown Thomas, Debenhams and Penneys.

However, the overall character of the area is more mixed with a number of office buildings, including Sarsfield House on the River, the Granary and various leisure/tourism uses, including the Savoy Hotel on Henry Street.

The principal open space in the area is Arthur's Quay Park facing on to the River, to the north of the Arthur's Quay West Shopping Centre, although there are open space areas to the rear of the Hunt Museum and the Bank Place/Charlotte's Quay frontage to the Abbey River. A number of streets in the area have seen improvements as part of the implementation of the City Public Realm Strategy. These improvements have included extensive pedestrianisation, for example along William Street.

As outlined earlier there is a growing level of vacancy in the heart of the City Centre, in particular the number of vacant units on Cruises Street is rapidly increasing. The area comprises the principal development site, the Opera Site which was purchased by the Limerick City Council from NAMA in 2012.

Another feature of the area is the location of the Milk Market to the east. This is the venue for a successful weekly market, following refurbishment and attracts substantial numbers of visitors at the weekend.

Table 24: Core Area

Strengths	Weaknesses
• The prominence of a number of leading retailers – Brown Thomas • Recent public realm improvements • Hunt Museum • Listed Buildings • Abbey River frontage • Milk Market • Fashion District • Catherine Street/Little Catherine Street Area • Independent shops	• Increasing vacancy levels • Shop unit sizes too small (e.g. Cruises Street) • Arthur's Quay Shopping Centre • Traffic – Especially one-way system and gyratory system traffic • 'No Go Areas' – Arthur's Quay Park after dusk • On-street parking • Street clutter • Poor signage • No City Square
Opportunities	
• Redevelopment of Opera Site • Redevelopment of Arthur's Quay Park • New City Square • Restructure / Renovate Arthur's Quay Shopping Centre • Renovate or remove Sarsfield House	• Redevelop / Renovate Cruises Street • Expansion of Penneys and improvements to Debenhams • Expansion of Brown Thomas • Enhancement of Patrick Street / O'Connell Street • Remove 'clutter' on the street

Main Georgian Area

This area to the south of the City Centre core comprises the best preserved Georgian urban fabric in the City. It extends between Pery Square to the east and Henry Street to the west. This Georgian stock ranges from large double fronted single houses to smaller 3 storey blocks. The highest quality Georgian houses are to be found in the vicinity of Pery Square, mainly 4 storey in size.

There are three important public spaces including the urban square at The Crescent on O'Connell Street, and Baker Place to the east adjacent to Pery Street. Both have had public realm improvements in recent years.

The other important public space is the People's Park to the south east of the area fronting on to Pery Square.

The Park is also home to the City Art Gallery at the junction of Pery Square and Upper Mallow Street. There are a number of other important buildings including The Belltable Theatre at 69 O'Connell Street, and the Angela Ashes Museum in the former school building on Barrington Street.

The vast majority of Georgian properties in this area are in use but their condition varies considerably. Most have been converted from their original residential use to include small business uses at ground floor level, with the upper floors largely unused or at best under-used. A more limited number are being used for residential purposes, but primarily to accommodate social housing. The overall condition of the Georgian properties is extremely poor.

Table 25: Main Georgian Area

Strengths	Weaknesses
• Georgian buildings and street form largely intact • People's Park • Established small business quarter • Museums/theatre • Pery Square (and No 1 Pery Square Hotel) • Crescent and Baker Place • Close to the Station	• Poor condition of buildings • Upper floors largely unused • Social housing • Economies of conversion • Falling demand • Unused backland areas • Distance / perception of distance from core area
Opportunities	
• Capture the heritage value – tourism potential • Build upon existing business base – established demand • Potential to re-establish a private residential neighbourhood	

Docklands

This area to the south west of Shannon Bridge around the Dock Road marks the southern edge of the City Centre adjacent to the River Shannon. It includes the remnant dock area to the south of James Casey Walk featuring a large wet dock, a graving dock area and a range of warehouse buildings. This dock area remains in low intensity operational use. The Riverfront immediately to the north has been redeveloped in recent years. This has resulted in the development of the Clarion Hotel on the Waterfront and new residential development to the east of Steamboat Quay, with retail and leisure units at ground floor level. There is a skate park at the junction of Shannon Bridge and Mount Kennett.

There have been a number of other new developments, utilising the tax incentive system to the east of the Dock Road and Mount Kennett. These are primarily in residential use.

Despite the recent nature of the development at Steamboat Quay and on the Dock Road the quality of this development is extremely poor. It would appear that most of the residential units have been let to people on social welfare support and a lack of management and maintenance has led to a rapid deterioration in quality and the overall environment.

Most of the retail units at the ground floor have been vacated.

Table 26: Docklands

Strengths	Weaknesses
• Waterfront • Views and Vistas • Listed Structures – Graving Dock etc • Clarion Hotel on Waterfront	• Poor quality of 'gateway' to City • Stigma /crime • Poor quality of contemporary development • Distance from the Core City Centre • Rented housing • Lack of demand
Opportunities	
• Public realm improvements upgrade • Renewal programme for Steamboat Quay	• Gateway feature • Enhance Dock Road • Longer term development potential of the docks

Eastern Fringes

This character area extends around the eastern edge of the City Centre where the traditional Georgian and Victorian Street structure breaks up. It comprises a range of typical City Centre fringe uses, including residential uses and lower order business/retail uses. Indeed there are elements of suburban style development styles - for example Sean Heuston Place.

Colbert Railway Station is a listed structure, but is in relatively poor condition and the front approach to the station is in need of substantial improvement.

Table 27: Eastern Fringes

Strengths	Weaknesses
• Key heritage features – John's Square • St John's Cathedral • Railway/bus station • Gateway location/City Centre entry points • Active uses	• Varied quality of building • Irregular street structure – legibility • Low value uses • Poor quality housing • Traffic / street parking • Poor pedestrian environment • Poor station environment • Poor gateway to City Centre
Opportunities	
• Enhance Colbert Station and station approach • Integrated public transport interchange • Improve connections from station to City Centre core	• Improved connections of John's Square to City Centre core • Manage traffic / address on street parking • Improved signage – mark edge of City Centre

Clare Bank

The western bank of the City Centre or the County Clare Bank as is referenced is often overlooked. Yet it is from this side of the river that you get best view the City Centre. It is also potentially part of a significant promenade route from Shannon Bridge to Thomond Bridge and around the eastern bank on the City Centre side. Most of the uses on this bank of the river are residential particularly to the north of Sarsfield Bridge. There has been a new development at the junction of O'Callaghan's Strand and Ennis Road. This comprises the new Strand Hotel and 5 residential blocks.

The quay side has been extensively improved with a new boardwalk running the entire length of the river from Shannon Bridge to Thomond Bridge. There are a number of viewing points along this promenade where it is possible to stop, sit and look back across the river to the City Centre. One notable feature of the Clare Bank is the location of the Treaty Stone – a listed monument of historical & local significance. Finally there is a significant vacant development site the 'Golden Vale' site, currently on the market at the southern end of O'Callaghan's Strand to the north of O'Connell Road. This is a former factory site which includes two listed buildings/structures.

Table 28: Clare Bank

| Strengths	Weaknesses
• Views of the city • Attractive promenade • Investment in public realm • 'Treaty Stone' location • New development	• Redundant buildings / vacant site
Opportunities	
• Incorporate into tourism trail • Make part of health circuit • Redevelop vacant site at North Circular Rd and Callaghan's Road	

6.   City Centre Traffic Management Assessment

Initial Analysis & Review

The following diagram illustrates schematically how the network in the City Centre currently works.

Figure 11: Current Movement Network
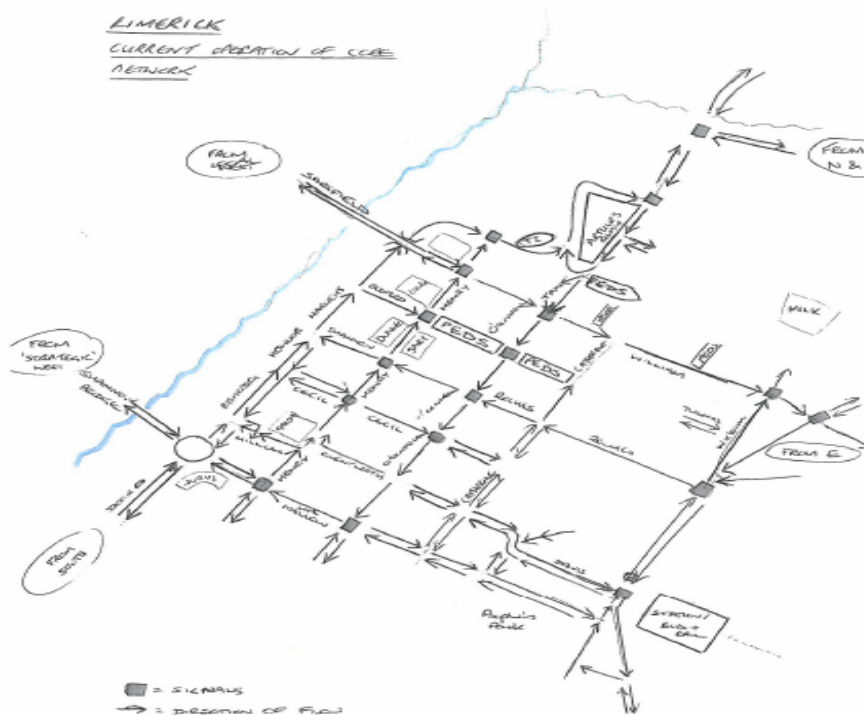
Pressure Point at Sarsfield/O'Connell Street Junction

Sarsfield Street/William Street Corridor is the most congested area and has a dual role of 'cross city' and 'access to city'.

All traffic entering the City Centre from Sarsfield Bridge has to use O'Connell St to access the car park 'cluster' around Shannon/Henry Street areas. This creates right turn pressure at the most critical shopping location.

Lower Mallow Street westbound only between O'Connell St and Henry Street exacerbates pressure on Sarsfield/William Street 'corridor' and Henry Street area. Making this section of one way route two way could encourage greater movement across Shannon Bridge rather than Sarsfield Bridge. This is better for core footfall areas and spread traffic away from the Henry St/Cecil St and Sarsfield St junctions. This change could be accommodated.

Quayside duplicating Henry Street

North of Cecil Street there is no 'strategic reason' for northbound movement on the Quayside. It duplicates Henry Street. This can be a key Riverside recreation area.

North of Bedford Row, Harvey's Quay onto Honan's Quay is lightly trafficked and creates the need for signals at Henry Street/Honan's Quay. This route section is not needed except for access. It blights the river frontage with excessive infrastructure. Signals could be removed at the north end (near Arthur's Quay if traffic is discontinued under Sarsfield Bridge).

Bedford Row being eastbound 'sucks traffic' from Shannon Bridge up the Quayside rather than encouraging it to use Henry Street. The only reason to be Northbound on the Quayside north of Cecil Street is to access the Howley's Quay car park.

O'Connell Street – The only southbound route

O'Connell Street is the only real southbound route in the City Centre core. The demand for traffic access <u>through not too</u> the area conflicts directly with the role of it between Arthur's Quay and Bedford Row as core footfall zones for the City Centre.

An alternative is needed but must allow access to the car park zone (primarily around Shannon Street/Henry Street area) – this means Southbound on Henry Street is the only real option. That in turn incurs right turn penalties.

There is too much 'on-street' parking between Cecil and Sarsfield Streets.

Henry Street – Poor use of space

Oversupply of lanes means higher speeds and poor use of space overall. Need to rationalise.

Maximum 'through lanes' available limited to three by Franciscan Church between Sarsfield Street and Bedford Row (right photo below).

Area outside Savoy with Echelon parking (and on Shannon Street) is poor organisation and use of frontage.

North of Sarsfield Street this corridor (k/a Liddy Street) is more lightly trafficked.

Henry St is likely to be able to cope with minimum of 2 lanes northbound and 1 lane southbound, with right turn boxes added at junctions.
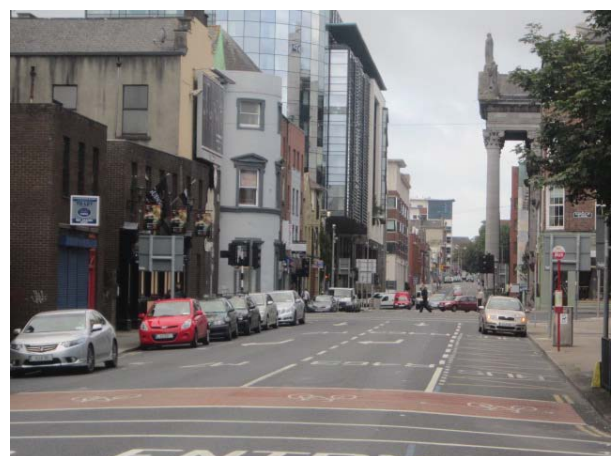
Henry Street and O'Connell Street Together

Although it may be beneficial to create full pedestrian area on O'Connell Street it is unlikely that Henry Street could cope with all relocated traffic (and turning movements). Northern entry width to Catherine Street restricts significant use of that corridor south of William Street.

O'Connell Street could have increased pedestrianisation while retaining traffic south of Sarsfield Street junction in particular, working with Henry Street to 'spread the load' but create a better pedestrian/vehicle balance (see figure 12 below).)

North of Sarsfield Street junction some or all of (except local access) the southbound movement along O'Connell Street could be diverted onto Henry Street at Arthur's Quay . This would allow linkage across from The Milk Market and pedestrianised area towards the Shannon Riverside and Arthur's Quay pedestrian entrance. This could remove the need for signals at Arthur's Quay/O'Connell Street

There is to much parking on O'Connell Street between Sarsfield Street and Cecil Street. At least one side of this could be removed to create a stronger pedestrian movement.

Arthur's Quay is in a sea of traffic. The main pedestrian entrance fronts onto a traffic gyratory that is over-designed against apparent use.

Figure 12 below demonstrates the concepts to be considered.

Figure 12:   A. Making Henry Street southbound
                    B. Helping O'Connell Street southbound
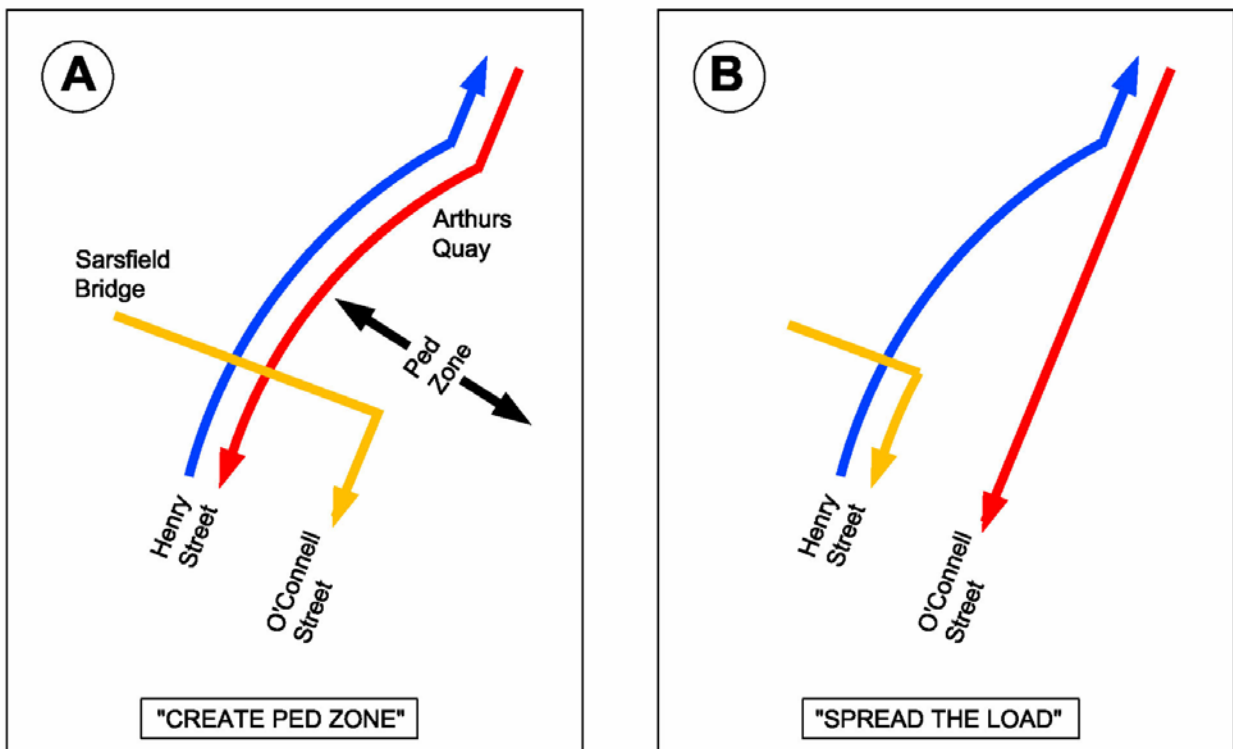
Other Key Issues to Consider

Do not underestimate the importance of the bus station (and to a lesser extent the railway station) on the City Centre. The current route is poorly signed and legible but footfall appears strong on site. Davis Street/Glentworth Street via the square at Pery Street/Dominic St. A stronger gateway car park in this area to the City would help re-balance distribution and provide amenity for the south eastern side of the City Centre.

Redesign roundabout at eastern end of Shannon Bridge to reflect movement volumes and reduce pedestrian severances – there is a prime movement from Shannon Bridge to Dock Road and return, whereas Bishops Quay could be significantly discouraged. Pedestrian movement at the junction is difficult particularly on the east-west axis – exacerbated on the northern arm (Bishops Quay) by the sheer width of this relatively lightly trafficked road.

Catherine Street corridor is un-signalised and there is evidence of traffic conflicts at priority junctions occurring as north-south traffic meets east-west traffic. This creates difficulties for pedestrians in particular and lack of clarity for all.

Similar occurs at Glenworth Street with O'Connell Street junction.

Key Areas for further analysis / conclusions

- 'Split the traffic' southbound between O' Connell Street and Henry Street – in conjunction with alterations around Arthur's Quay to 'straighten' the northbound route.

- Use the advantage of this to reduce the parking and vehicular impact on O'Connell Street, particularly between Sarsfield Street and Cecil Street.

- Consider removal of all traffic on O'Connell Street between Sarsfield Street and Denmark Street and remove the cut through from O'Connell Street to Arthur's Quay (the 'return loop'). To create a central pedestrian zone where it is most needed.

- Close Honan's Quay and investigate one way southbound on the Quayside between Bedford Row and Cecil Street.

- Re-open Lower Mallow Street eastbound between Henry Street and O'Connell Street.

- Create a stronger pedestrian route between Rail/Bus Station and O Connell Street improving Davis Street and Glentworth Street.

- Consider some implementation of signals or more restricted junctions along the Catherine Street corridor from Roches Street to Mallow Street.

7.   Exemplar Studies

In developing an Economic and Spatial Plan for Limerick, inspiration has been taken from good practice across the world – drawing lessons from individual projects that relate to the circumstances found in Limerick. Many of the projects selected relate to larger cities. In these instances the key message is not the scale but the idea, the principle or the approach that is important.

A thematic approach has been adopted addressing the following elements:

- **Shopping –** as there is a need to totally revitalise the shopping offer refit models are therefore most appropriate where modern shopping methods are being implemented. In addition the independent sector will be essential for Limerick as will an enhanced outdoor market environment.

- **Knowledge –** the idea of using higher education in the City Centre to drive economic change. Also the idea of knowledge/technology led economic change.

- **City Centre Living –** Limerick City Centre offers the opportunity for different living environments – Waterfront, Georgian, Medieval and 20th Century. A key area is the renovation and re-use of a Georgian neighbourhood. A comparable example is the Duke Street/Bold Street area of Liverpool.

- **Destination/Iconic Buildings –** there is much to be learned from the use of culture/tourism iconic architecture in terms of place making and branding, for example Oslo, as well as the use of culture to drive regeneration.

- **Events/Festivals –** global events are hugely influential in changing image and driving tourism and wider investment. A good example is the Manchester International Festival.

- **Waterfront –** there are now many excellent waterfront developments across the world – though no two are alike. Liverpool has lessons, as has Melbourne and Ebro in Portugal. Scandinavian countries also offer lessons – Copenhagen and Oslo are good examples.

- **Green Cities/Sustainability** – this is a growing feature of city design and renaissance. Scandinavian cities offer excellent lessons – Stockholm, Copenhagen. Also Freiburg in Germany and certain north American cities - Chicago.

- **Branding/Market Positioning** – place branding is now recognised as being critically important for many great cities. Some do it better than others. Manchester is one of the best examples, but Liverpool and Amsterdam can provide lessons.

There are many other themes that can be explored, but we believe these are centrally important to Limerick.

Shopping

Marylebone High Street, London

Marylebone High Street has undergone significant regeneration over the past 10-15 years, transforming it from a poorly performing shopping street with high vacancy rates and low rents to a niche shopping destination.

A variety of independent retailers, boutiques and smaller chains were attracted by lower rents in a deliberate strategy to create an alternative shopping destination in what has been marketed as Marylebone Village.

Lessons

Marylebone High Street has been very successful in positioning itself alongside the retail core and delivering an alternative retail offer. Combined with attractive architecture and urban realm, the owners have created a retail destination which has revitalised the surround area.

There is a need to define an area to complement other retail areas, rather than to compete. Important consideration for Catherine Street, Thomas Street area to become a defined independent retail area.

St Giles, London

GVA have recently advised on the shopping renaissance of the East End of Oxford Street which has traditionally fared poorly compared to the primary retail area around the west of the street, Regent Street and Bond Street. Development has been constrained by multiple ownerships and competing interests.

The proposed development of Crossrail at Tottenham Court Road provided a catalyst for the regeneration of this area. The New West End Company Business Improvement District, set up in 2005 has unified. Pro-active in promoting the area with initiatives such as a 'digital guide', a marketing campaign, various events and a social media campaign.

Lessons

The value of the Business Improvement District in focussing and aligning resources has been evident in overcoming ownership constraints and facilitating development through collaborative working in accordance with a clearly defined strategic objective. In addition, the importance of an anchor tenant in attracting further retail investment is also evident, coupled with a powerful marketing campaign.

Liverpool One

Now seen as the leading regional shopping scheme in the UK outside London. This is an example of a cohesive masterplan led approach. Product defined by the requirements of the market.

Lessons

The key lesson for Limerick is to take a comprehensive masterplan led approach to reinventing the shopping offer with the use of the compulsory purchase order (CPO) powers to assemble land. Also note the street based centre approach combining pedestrian friendly environment, discrete parking, excellent signage and integrated restaurants, bars and leisure. Also note the connection to the Riverfront – integrating the City Centre and the River by better street connections and street crossing.

Borough Market, Southwark, London

One of the largest and oldest food markets selling a variety of foods from all over the world. The market is administered by 16 trustees. A fashionable place to buy food, it has been promoted by British Television chefs and has been used as a film set. The market has its own website and Facebook page to attract visitors and to alert them to any events or promotions.

Lessons

The opportunity to build upon the success of the Milk Market and introduce a regular covered/outdoor – streed based market with a focus on interesting food – themed markets. Links to city strengths in Food Technology.

Knowledge Economy

Tech City, Shoreditch

TechCity in east central London is home to technology, digital and creative companies ranging in size from start-ups to multinationals.

The Shoreditch location offered a ready stock of existing relatively inexpensive office space and, while tie-ins exist at the university and college level, the real success appears to be in the establishment of a self – reinforcing cluster of IT businesses.

The Tech City Investment Organisation is working in collaboration with key partners to make Tech City a success, promoting the area's reputation globally. Partners include UK Trade & Investment, London Mayor's Office and Hackney Council.

A number of festivals have also been launched, including Digital Shoreditch and Tech City Entrepreneurs Festival.

Lessons

A close link between education and business start ups in IT/Digital Sector. An edgy urban environment with good supporting facilities. Cheap flexible accommodation. Build on regulation/brand. Extensive support packages including R&D tax credits of up to 200 per cent (increased to 225 per cent in 2012) available for small companies.

Cutting edge ICT and Broadband connectivity facilities available.

New York City Science University, New York

The development of a new university campus on Roosevelt Island, New York aims to provide a leading engineering science research university for the city.

To be established by an international partnership between Cornell University and Technion-Israel Institute of Technology. The campus will extend to 20 million square metres, to accommodate 2,500 graduates and 280 faculty members.

Lessons

Potential for educational led regeneration. The creation of an Urban Campus – also a combined university approach.

Medical and Related Sciences District Centre, Toronto

The Medical and Related Sciences (MaRS) Discovery District in Toronto –MaRS is a not-for-profit organisation. Its initial focus was the medical sciences, but its work now extends into ICT, Engineering and Social Innovation. Facilities include: conference centre, media centre, incubator space, wet-labs, cutting edge scientific equipment and Canada's premier research hospitals. 2 million sq ft of research and development space. Anchored by a private developer specialising in the creation of bio-medical commercial space – Alexandria.

Lessons

Demonstrates economic and commercial value of medical science and key role of universities in the formation of knowledge hubs.

Destination

Titanic, Belfast

	Titanic is a new high quality destination building on Belfast's waterfront. At a cost of £100m it opened in April 2013. It comprises an interactive museum, banqueting hall for 720 people and a venue for events, and aims to achieve almost 500,000 visitors in its first 6 months of opening.

Lessons

The need for a clear theme to a destination – a high quality facility and a concerted branding and marketing campaign.

Oslo Opera House, Norway

	Oslo Opera House opened in April 2008, creating an iconic new building within Norway's capital city. The building is located within Bjorvika, a run-down area of Oslo which acts as the gateway to the city when arriving by boat, bus or train.
	The primary rationale for developing the Opera House at this location was to stimulate the regeneration of the Bjorvika area. Design competition held to develop two museums and a public library to form a new cultural centre. The Barcode Project is currently under construction and will comprise commercial floorspace and 500 apartments.
	Statistics indicate that the Opera House is now the most popular tourist attraction in Oslo, with

	over 1.7 million visitors in 2010.
Lessons The development illustrates the potential for an iconic building to stimulate development in the wider area and to become a marketing symbol and a visitor attraction in its own right. Key to the success in the Oslo experience is the use of the building as a place marketing opportunity. The prevalent use of iconic buildings in advertising campaigns is one such example of how buildings can be used to promote a city and to reinforce the positive identity of a city.	

City Centre Living Residential

Eixample, Barcelona

	The Eixample (Catalan for extension) is a residential district of Barcelona between the old city and what were once surrounding small towns, constructed in the 19th and early 20th centuries. Eixample was planned to contain all the residents needed for their daily lives, including markets, schools, hospitals, and leisure facilities.
Lessons The potential to plan a new city neighbourhood – for example in Irish Town. A comprehensive approach with clear vision and ambition. Create a place that people will wish to invest in.	

The Meatpacking District, New York

The Meatpacking District is a neighbourhood in the New York City borough of Manhattan which has developed a distinctive identity and is home to a thriving residential community. In 1900 the area was home to 250 slaughterhouses and packing plants but by the 1980's, it had become known as a centre for drug dealing and prostitution. Beginning in the late 1990's, the Meatpacking District went through a major transformation.

The area now hosts a number of events and activities including: Farmers markets, culinary tasting events, outdoor concerts, marketing and promotional events, cultural and educational programming, public art and performances, fashion events, photo, television and film shoots. The Meatpacking District is now known as one of New York's most fashionable neighbourhoods.

Lessons

Noteworthy example of distinctive neighbourhoods where residential communities thrive. Through the imaginative use of public spaces, the use of events and the addition of inspiring retail and restaurant provision, neighbourhoods can transform in areas such as the Georgian Quarter and Irish Town. Historical and cultural roots can often provide the basis for the distinction.

Events/Festivals

Manchester International Festival

The Manchester International Festival is an international cultural festival of original new work. A total of £2.4 million was raised in sponsorship in 2011, and created £23.3 million advertising equivalent value of media coverage and had an economic impact of £37.6 million.

Lessons

This has become symbolic of a creative Manchester and is now influential in scope. Show potential to use events, to promote a city – not just nationally but internationally. This can be driven by the private sector – not public sector led, though public sector supported and facilitated.

Waterfront

Gabriel's Wharf, South Bank

Gabriel's Wharf is a highly popular riverside destination which was originally old garages with shop-fronts added to convert the units into retail design studios. Restaurants and Cafés overlooking the river give local employees a chance to enjoy the environment. The opening of Gabriel's Wharf in 1988 brought commercial and public life to an area that had long been derelict.

Lessons

The opportunity to activate the Waterfront by introduction of creative uses, bars, restaurants – using buildings of character and destination – in mixed use environment.

Liverpool

A 15 year renewal programme for the Waterfront has comprised the renovation of Albert Dock, the development of a new convention centre, hotels, residential, city museum, a cruise terminal and linking the canal.

Now promoted as an entity – Liverpool Waterfronts long term plan is for larger scale development on the western docks – Liverpool Waters – which is now a designated enterprise zone.

Lessons

The need to develop a long term plan for the Waterfront, step by step implementation, active uses as part of a mix, and improved connections with the core City Centre. Defined marketing and branding.

Melbourne Docklands, Australia

Melbourne's Docklands is the product of an ongoing urban renewal project to extend the area of the Central Business District by over a third when completed around 2015, providing retail, commercial and community uses within tram, boat and walking distance of the central city.

It is now home to several of Melbourne's modern landmarks including Southern Cross Station and The Southern Star (Melbourne's observation wheel).

A handful of significant buildings were retained, generally due to their association with the area's industrial and maritime history. Most of these heritage buildings have been the focus of

	adaptive reuse and integrated with new facilities.
Lessons Both Melbourne Docklands and Liverpool provide illustrative examples of what can be achieved in a Waterfront location. The adaptive re-use of buildings provides the historic reference and sense of identity which makes these examples so successful. Improving accessibility and connectivity to the waterfront integrates the area with the surrounding districts to create a coherent urban environment in which value is maximised. This is a larger term proposition for Limerick at the Lower Dock Area.	

Green Cities / Sustainability

Hammerby, Sjostad

This is a new district of Stockholm with tough environmental requirements of buildings, technical installations and the traffic environment.

Features a common eco-cycle model binding together the whole environmental programme. Aim to reduce emission by 50% compared to adjoining neighbourhoods. Comprises 11,000 residential units with 6000 built to date.

Lessons

A long term perspective to a new neighbourhood setting the highest possible environmental ambition. Direct interventions of city to ensure goals are achieved. High design from the outset.

Freiburg, Germany

A city in Germany of 230,000 people – widely recognised as one of the 'greenest' cities in the world. A key feature has been the use of passive homes – 10% more expensive to build with 90% less utility costs to run.

Lessons

An integrated approach to environmental sustainability – setting high standards/expectations for new build projects.

Branding/Positioning

Manchester
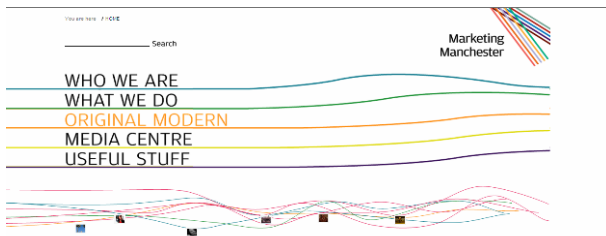
Marketing Manchester (est. 1996).

Board of 10 led by private sector including council, police, media and business.

In total approx £3.5m in 2011: £1.3m core income, £1m service level income, £1.3m commercial income, £175,000 other income.

Promotion of the city nationally and internationally. Visit Manchester is the tourist board for the sub region and is a division of Marketing Manchester.

Lessons

Brand development is a core focus of the local authority.

Events – establishing world-class events in the City.

Gateway to country – establishing Limerick as an alternative gateway via Shannon airport.

Promotion of Limerick as a business destination.

Tourism infrastructure development.

Liverpool

Liverpool is a city with an established global identity and resonance. Its 'brand' requires no explanation or superfluous adjectives. Liverpool stands for itself. We want you to use *it's liverpool* in your communication and language as an expression of Liverpool's essence and personality.

It's your capacity to invent and imagine that will define how, where and when the expression is used.

You can use it as:
- a simple, authoritative statement
- a signature to follow interesting and surprising information or alongside a visual that surprises.

If it expresses Liverpool's spirit of dynamic creativity then *it's liverpool*. This is not a conventional marketing campaign. We're embarking on a new voyage, but we have a fixed point to guide our navigation.

Liverpool Vision (est. 1999).

Newly elected Mayor has assumed responsibility through the Mayoral Development Corporation and a new Board of 10 Key partners of Liverpool Vision are Liverpool City Council, the Liverpool LEP and the Homes and Communities Agency. In 2012, the City Council established a fund of £350,000 for the marketing of the city by a discrete team within Liverpool Vision, to be match funded by the private sector. Strengthen the Liverpool brand world-wide and attract inward investment, entrepreneurs and highly skilled knowledge workers; and become a city of talented, highly skilled and innovative people. Key promotional and investment campaigns include:

'Its Liverpool' place marketing campaign launched in 2011 aims to:

- Promote the City with a single voice in a creative and consistent way;
- Develop a brand that appeals to residents, visitors, investors and students;
- Create a brand platform for partner collaboration and co-creation.

Lessons

A dedicated place marketing function – each has been established to focus on place marketing in recognition of the need for more positive place reputation to support economic development, tourism and investment.

Established arms length from the local authority as a public/private partnership – recognition of the need for broader ownership and place leadership than just the Council.

Leadership and governance – a leading figure from the private sector, leads a Board, with a wide group of other partners from the private and public sectors on the Board reporting into an appropriate partnership eg Local Enterprise Partnership.

Core budget provided by the public sector - supported over time by additional donations from

the private sector.

Brand based marketing – each uses a brand proposition or motto to underpin all marketing and promotion with campaigns anchored in the brand.

Key functions to promote externally and attract new audiences - hosting major events, proactive media relationships and PR, place web portal and social media and promotion of destination for business and visitors.

Left to right, from top / Luis Suarez, magician / Kirsty Doyle, fashion designer / Natasha Jonas, Champion / Dr Giancarlo Biagini, Liverpool School of Tropical Medicine / Francesca Halsall, British Record Holder / Ilsa Parry, product designer

i'm liverpool
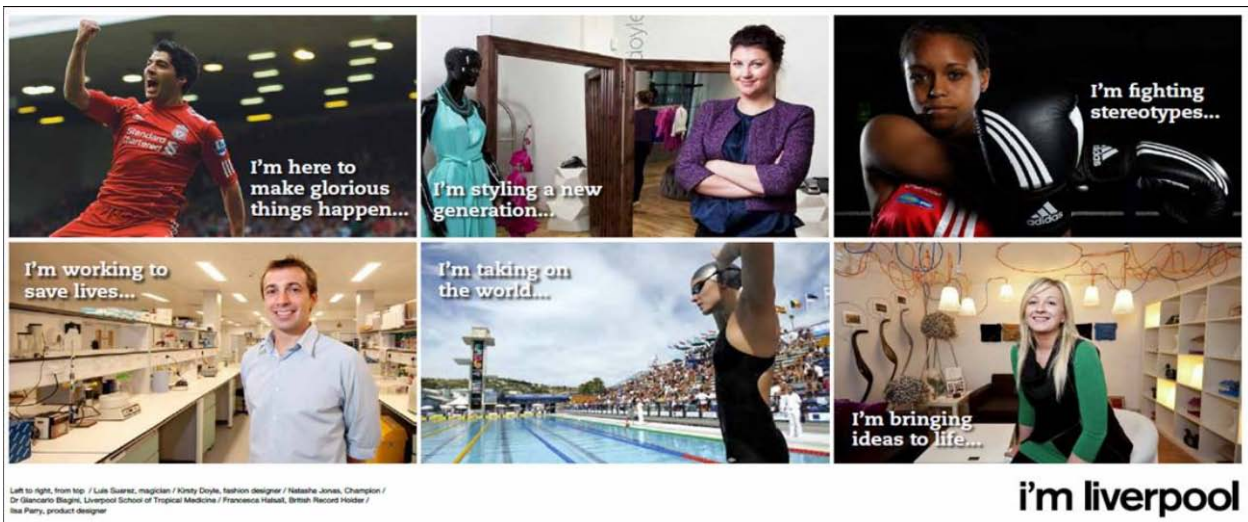
Amsterdam

Amsterdam Partners (est. 2004).

A public-private partnership with a Supervisory Board led by the City Mayor and a Management Board and Advisory Board providing links with all government agencies locally and regionally. Covenant Partners provide input from various related partnerships.

Team of approx 8 staff

€1.5m budget in 2011 (€1.3m of grants and contributions from public sector plus €146,000 from other including retail and donations).

Amsterdam Partner's goal is to promote and improve the image of the Amsterdam Metropolitan Area on an international level. A single concept guides the raising of Amsterdam's profile: the City is renowned for its combination of creativity, innovation and commercial spirit.

'I am Amsterdam' is the brand which is used by the Amsterdam Partners to showcase the City – via their own events and others.

They produce a city marketing plan and annual report each year to demonstrate their added value and measure impact on media coverage, brand awareness, partner collaboration, etc.

Lessons

Dedicated marketing team.
Use of a single concept.
Easy to grasp and understand.
Plays on City's image for creativity.

Appendix 2

Limerick Marketing Plan

CONTENTS

Place Proposition and Marketing Strategy for 'New Limerick'

1.   Rationale and Aims

'Place branding goes beyond mere slogans or old-fashioned ad campaigns; it involves more than gloss or spin or the placing of a territory on the map as an attractive tourist destination.'
Peter Van Ham, The Netherlands Institute of International Relations

While Limerick is Ireland's third largest city it lacks a consistency of message and positioning with local, national and international audiences. This situation is not helped by a proliferation of agencies at city, county, region and national levels, sometimes with conflicting messages, as well as a number of local and independent message carriers. However, there is an appreciation across stakeholders of the need to work more collectively and that a more coherent message can harness the collective influence of the many businesses, institutions and organisation who act as ambassadors for Limerick.

Limerick has many positive assets, some of which have successfully served as the basis for a number of promotional campaigns and initiatives such as European City of Sport, City by the River and in 2014, the Irish City of Culture. However, while there is value to one-off campaigns, they need to be set in the context of a strong, consistent, long term strategy and proposition for the City. Specific campaigns and events programmes can then build off and reflect this proposition with the opportunity being to create a rolling strategy, where campaigns and events are anchored in the proposition and over time, have a genuine impact on changing perceptions of the City both internally and externally.

There is huge pride in Limerick and representatives of local business associations, higher educational institutions, cultural institutions, individual business owners and youth representatives have displayed a fierce commitment to Limerick. Nevertheless, the local, regional and national press all too easily revert to negative stories about the City – even when there are good news stories to be told. This takes its toll on local people's belief and attitudes and the ways in which they communicate with each other. Thus, negative stereotypes and perceptions are reinforced even when the reality is more positive.

Therefore, two of the main marketing challenges for Limerick are of lack of awareness and/or a negative reputation with many of its most important stakeholders. It is proposed therefore that the existing gap in Limerick's marketing be filled with a new Limerick Marketing Plan - *place proposition* and *place marketing strategy for New Limerick*. Over time, the adoption of both, aligned with the physical and economic development proposed in the *Economic and Spatial*

Plan will ensure that the tourism, event, investment and business marketing that already happens and is delivered through a range of different partners, will start to achieve increased impact.

It is essential that Limerick has an authentic place branding proposition that genuinely reflects its positive attributes and a place marketing strategy which effectively promotes the City and surrounding area. This proposition must tell a new story of Limerick; one that challenges perceptions of the City and surrounding area, surprises people and causes them to reconsider their view or opinion. The proposition must be aligned to the target economic sectors identified, but also the quality of life and quality of place that potential investors and visitors will seek. The consistent use across all place promotional activities, by a range of partners of this proposition will, over time, create the positive awareness required to change perceptions and attitudes towards Limerick as a place to invest, work, live or visit.

Confidence, consistency and clarity of the Limerick Marketing Plan - Place Proposition and Place Marketing Strategy, supported and proactively championed by all partners and stakeholders will be the key factors of success for Limerick.

Proposed aims of a new Limerick Marketing Plan - place proposition and place marketing strategy are:

- To build a more positive reputation of Limerick with regional and national Irish audiences;

- To unify Limerick organisations with a shared sense of place and purpose;

- To develop more local resident and business confidence;

- To achieve greater value and consistency from existing marketing and promotion;

- To attract more people to experience the City Centre;

- To support job creation and the ambitions of the new economic strategy.

2.   Limerick Place Proposition

The new place proposition for Limerick is based on the following model which delivers a central idea and associated themes which together form the new place proposition. This proposition is used to inform, direct and align activity to provide consistency of place message and communications. It can additionally be used to help inform the wider aspects of place experience including the physical environment (public realm etc), the products/services (businesses, attractions etc) and behaviour (city welcome etc).

Figure 13: Place Proposition
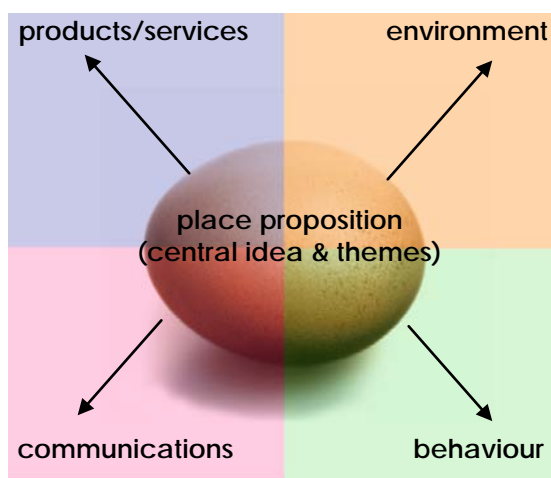
Using insight, knowledge and opinion gathered through workshops, face to face and telephone interviews, desk research and immersion in Limerick and with consideration of relevant policy and strategy documents, there is evidence that the new proposition must:

- state confidently and assertively that this is Limerick

- challenge false beliefs about Limerick people and place

- surprise with a new statement about Limerick, its ambitions and its purpose

- support the economic strategy ambitions

- complement and join up sector-specific propositions & messages

- And in its delivery, the new proposition needs to develop the sense of a place that is:

- resilient, attractive and forward looking

- alive with industrious endeavour and academic energy

- ambitious and purposeful

- animated with vibrant leisure, culture and sport

- genuine and authentic, with rich industrial, political and cultural heritage

- newly unified, coherent and as one

2.1   Themes

The themes identify the most important assets and strengths, as well as future ambitions and aspirations. In relation to Limerick, this leads to our recommendation of the following themes:

Enterprise and Knowledge

Limerick Institute of Technology	Life Sciences	Sport
University of Limerick	Low Carbon Sector	Art and Culture
Mary Immaculate College	Logistics and distribution	Fashion and design
Business growth	Creative and digital media	High skill labour supply
Research facilities	ICT	Start ups
Technology transfer	Advanced manufacturing	
Venture capital sources	Business/professional services	

Attractive and Historic

Viking City	Treaty	Georgian City
Medieval City	River Shannon	O'Connell Street
Fortress City	Surrounding countryside	St Mary's Cathedral
Cathedral City	King John's Castle	
Trading City	Georgian Quarter	

Creative and Vibrant

Munster Rugby	Fresh Film Festival
Thomond Park	L.I.T Film Festival
Hurling	Eva International
Gaelic Football	Unfringed - Performance Festival
Limerick Racecourse	Culture Night – venue late opening
Limerick FC	Kate O'Brien Weekend
Adare Manor	Cuisle – International Poetry Festival
Higher Educational facilities	Children's Book Festival
Triathlon	St. Patrick's Day Festival
The Great Limerick Run (Marathon)	May Music in the Park
Ballyhoura Bike Trail	Pig 'n' Porter
Limerick Kayak Club	Limerick Youth Fest
Rowing Clubs	Riverfest
Limerick School of Art & Design	Féile Luimní
University of Limerick Outreach	LGBTG Pride
University Concert Hall	The Hunt Museum
Millennium Theatre	The Beltable Arts Centre
Bourn Vincent Gallery	Limerick Printmakers and Gallery
National Self Portrait Collection of Ireland	The Frank McCourt Museum
Limerick City Gallery of Art	Limerick City Museum

Green and Sustainable

Surrounding countryside
City Centre green space
River Shannon
Growing low carbon economy
Ambitions for a more sustainable future

2.2 Central Idea

The central idea links the themes together and defines what Limerick is, what it means to be part of Limerick and the promise of Limerick to its various audiences.

This is not a strap-line or a marketing slogan, but a strategic, motivational and inspirational statement of intent. Limerick's central idea is proposed as:

Authentic~Innovative~Progressive

Authentic~Innovative~Progressive is a statement of intent, an essence, and a promise of what Limerick is, how it works and what it wants to be famous for. In evidencing or explaining it, there is a need to consider the behaviours and credentials of Limerick such as:

- An authentic place of substance with an impressive industrial and historic heritage;

- A place of authentic people – genuine, natural, real, welcoming, friendly, leaders and achievers;

- A place that has a progressive outlook to knowledge and innovation – look at our education and business assets;

- A place that continues to exploit its natural resources with progressive ambition – low carbon economy, enhancing its City green credentials.

So collectively, the new proposition provides a strategic positioning, with four associated themes to focus messaging and communications around Limerick as:

Figure 14: Statement of Intent

Authentic ~ Innovative ~ Progressive

Enterprise and knowledge   **Attractive and historic**   **Green and sustainable**   **Creative and vibrant**
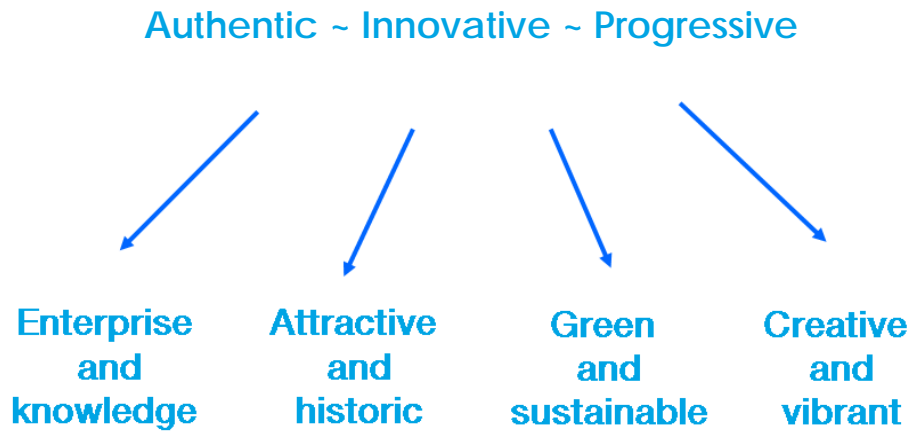
3.   New Limerick Story and Key Messages

Having developed a new, distinct proposition for Limerick, it will be critical that this is cascaded and shared widely amongst key stakeholders in Limerick, across the region and possibly wider through the diaspora and wider alumni.

In particular, delivery of the proposed Marketing Plan requires engagement with stakeholders in order to identify opportunities for alignment of messaging and activity behind the new proposition. This can only be achieved if organisations have a thorough understanding of why the new proposition has been developed, what it means to them and how they can use and apply it in their own corporate activity.

In order to facilitate the sharing of the proposition, a narrative has been developed which has been formed into the 'Limerick Story'. Producing, publishing and circulating this as the first piece of collateral to support the new place marketing strategy will be key to ensuring that wider buy in to the strategy is secured and that greater value and impact is achieved from existing and future promotional activity.

This approach has many benefits, not least that it ensures that everyone has the same context and view of why Limerick needs to manage its reputation and of the most important messages to use to contribute to this. Appropriately presented as the new story of Limerick, it will also provide a clear signal of how the new authority and its wider partners see partnership working behind the place as the way forward.

The proposed copy for the new Limerick Story is provided in the Reference Materials Section

4.   Place Marketing Strategy

Successful place marketing of Limerick will require:

- Leadership – evidence of both civic and wider place leadership with key senior figures and ambassadors publicly working to build place reputation and image.

- Partnership – evidence of organisations working together for the greater good of the place, collaborating and cooperating with the promotional challenge seen as the shared responsibility of all organisations.

- Clarity – a clear, confident proposition told by everyone, which focuses on a small number of key strengths.

- Consistency – alignment of place messages, regardless of which organisation is speaking with messages anchored around the proposition to reinforce key messages. Organisations have access to and use tools to support the place promotion challenge including photography, copy, materials etc.

- Commitment – commitment to resources to support the place marketing that is enduring and long term and seen as an investment in the economic prosperity.

4.1   Limerick Place Marketing Principles

This Limerick Marketing Plan – place proposition and marketing strategy for 'New Limerick' is based on the following principles:

Bringing the Limerick proposition to life

Gain buy-in and ownership to the new proposition from all major partners and organisations and enable them to use the proposition and align activity and materials as part of their own communications, marketing and promotion through the provision of appropriate tools, encouragement and support.

Champion Limerick

Develop proactive ambassadors for Limerick within key organisations, the Limerick diaspora and wider place alumni, providing them with relevant information, news and tools to enable them to speak up for Limerick through their own networks and relationships.

Living up to the expectation

Prioritise the animation of the City Centre through improved all-year round coordination of events; definition and agreement of the 'Limerick Experience' of agreed quality and standards for events; and definition of the 'Limerick Welcome' of hosting key visits to the City for economic, media, educational and cultural influencers and target audiences.

A Unified Approach

Use the proposition and stakeholder engagement of this project to create a shared regard for a place-wide approach to place marketing, with accountability within one single organisation, responsible for planning, coordination, leading and alignment of all place related promotional activity.

4.2   Target audiences

Limerick engages with a wide range of audiences on a daily basis but this place marketing strategy and plan prioritise the specific audiences that Limerick needs to influence so that activity can be appropriately targeted.

Therefore the proposed principal target audiences are:

- Residents and businesses - Limerick City and County

- Residents and businesses of wider Mid-West and Ireland

- Tourist visitors to the west coast – domestic, European and International

- Potential economic investors and corporate transfers, as part of inward investment strategies

- Opinion formers in the local and Irish media

4.3   Objectives

The specific objectives of the place marketing strategy are:

- To create buy in and support from key organisations to the aims and objectives of the place marketing strategy;

- To directly influence the future communications of organisations to deliver a consistent and coherent message about Limerick;

- To develop and maintain a Limerick 'toolbox' of materials, messages and collateral for distribution to and use by stakeholders;

- To agree an events programme which encourages more local and regional residents and businesses and national visitors to experience the City Centre;

- To create and empower a network of active individual and organisational place ambassadors;

- To positively influence the perceptions, views and opinions of Limerick by target audiences through direct marketing activity, media management and active social media management;

- To ensure partner collateral and messaging relating to inward investment and tourism is aligned behind the place proposition;

- With partners, enhance the physical welcome into Limerick through improved gateway entry point experiences on roads, at the station and at Shannon Airport;

- With partners, identify and agree activity to animate the City Centre experience including lighting, signage, empty shops, street art, etc;

- With partners ensure future bespoke campaigns (including City of Culture 2014) are aligned behind the place proposition.

Bringing Authentic~Innovative~Progressive to life will require new thinking and to some extent new behaviour. In will therefore be important that early activity provides exemplars of how this should be done, providing a benchmark for others.

For example, ensuring that imagery always uses real Limerick places and people and not stock photography as a way of illustrating authentic, genuine reality and delivering a modern, contemporary, progressive image, even when the focus may be on traditional history and heritage.

Such early win opportunities will be presented in the development of the Place Marketing Toolkit and through alignment of partner activity and communications, as identified through discussions with partners.

5. Place Marketing Plan

Timescales are not dated but propose phases of activity based on calendar quarters from the commencement of the plan.

Project	Description	Uses/Capacity/ Area	Public Cost	Private Investment	Time-scale	Lead Responsibility	First Steps
Accountability for Place Marketing Strategy delivery	Identify lead organisation	Decision on route/ vehicle to manage and deliver place marketing strategy & plan	0	n/a	Q2 2013	City & County Manager	Scope requirements including role, skills, responsibilities and resources
	Agree and source resources	Commitment to resources to support delivery of place marketing strategy	Use existing Limerick Communications Office budget plus other funding sources	Possible support from larger stakeholders (UL, LIT, FI etc)?	Q2 2013	City & County Manager	Identify lead organisation
	Governance	Agree and put in place cross-sector governance of place marketing vehicle	0	n/a	Q2 2013	City & County Manager	Identify lead organisation
Place Marketing Toolkit	Develop Limerick Identity and Toolkit	Design and production of a graphical visual expression /language and electronic toolkit of the new Limerick proposition	€12,500	Possible in-kind support from local design agency?	Q1 2013	New Limerick Marketing Company	Produce brief based on proposition
	Publish *The New Limerick Story*	Design and production of the written story of the new proposition to share with stakeholders to engage and	€2,500-€5,000	As above	Q1 2013	New Limerick Marketing Company	Sign off the proposed story provided as part

Project	Description	Uses/Capacity/Area	Public Cost	Private Investment	Time-scale	Lead Responsibility	First Steps
		align activity – PDF or printed					of this work
	Imagery Library	Review of existing photography and possible commissioning of new to support proposition	€2,500	Or €2,500 (identify local sponsor)	Q3 2013	New Limerick Marketing Company	Review imagery of different organisations and stakeholders
	'Who Knew?' – Must know facts about Limerick you never knew	Develop dynamic suite of must know facts and key messages about different aspects of Limerick life – PDF/electronic for free distribution	0	0	Q1 2013		Agree target sectors
	Media templates	Develop and distribute standard copy to support media and press releases from Limerick organisations	0	0	Q1 2013		Identify target organisations
	E-mail sign off	Develop and distribute standard e-mail sign off to be used by anyone representing Limerick, linking to Limerick.ie	0	0	Q3 2013		Update Limerick.ie
	Limerick.ie	Position this as THE Place Website for Limerick and update the copy and imagery to align with the proposition themes	€1,200	Possible in-kind support	Q2 2013		Review existing website copy and imagery
	Video showreel	Develop a promotional video of the city and surrounding area and distribute to partners, businesses, hotels, restaurants	€4,000		Q2 2013		Review existing video footage
	PowerPoint presentation	Develop Powerpoint presentation of the new Limerick story with relevant imagery and distribute to stakeholders and partners	0	0	Q2 2013		

Project	Description	Uses/Capacity/ Area	Public Cost	Private Investment	Time-scale	Lead Responsibility	First Steps
Cascading and embedding the place marketing strategy	Stakeholder re-engagement	Host event for stakeholders involved in project to date to share proposition and advise on new approach to place marketing – distribute new Limerick story	€600	Identify private sector partner to host event	Q1 2013	City & County Manager /new Ambassadors	Agree strategy and new delivery mechanism
	Limerick Ambassadors	Identify and enlist support of most senior stakeholders as Limerick Ambassadors to facilitate alignment and deliver place ambassadorial support through media and own networks	0	0	Q1 2013	City & County Manager supported by Limerick Marketing Company	Develop terms of reference for Limerick Ambassadors
		Develop a Limerick Ambassador Programme with regular briefings to update members, e-bulletins to keep members informed of success, priority invitations to events, opportunities to comment about the city in the press etc	0	Ask local hotels to sponsor breakfast meetings	Q1 2013 onwards		Identify most senior members to start the network
	Achieve message alignment/ better value	Individually work with the communications teams of large organisations and important groups to identify routes to align messaging and place marketing opportunities through their own activity	0	0	From Q2 2013	New Limerick Marketing Company	Agree target organisations
	Engage support of local stakeholders	Event for wider group of local businesses and organisations to introduce the new proposition as part of informing and developing support for economic strategy – distribute new Limerick Story	€800	Possible in-kind support from hotel/ venue	Q2 2013	Limerick Local Authorities	Agree strategy

Project	Description	Uses/Capacity/ Area	Public Cost	Private Investment	Time-scale	Lead Responsibility	First Steps
Media Management	Local Media Ambassadors	Engage local media as place ambassadors using the new Limerick story and Ambassadors	0	0	Q1 2013		Review current relationships and prioritise targets and activity
	National Media	Encourage a different view of Limerick by national broadsheet, tabloid, trade and specialist media correspondents with enhanced engagement with city leadership, visits and meeting Ambassadors	€2,000	0	Q1 2013		Review current relationships and prioritise targets and activity
	Social Media	In addition to approach of promotion of local events, use social media to provide views/ commentary on topics and issues relevant to the economic strategy and key sectors	0	0	Q1 2013		Agree strategy
Local /Regional Place Marketing	Local pride	Agree route to deliver broader messaging about Limerick via I Love Limerick platform, specifically to community	0	0	Q1 2013		Agree new relationship with ILL
		Approach local media to support local pride campaigns/ linked to Ambassadors and new economic and spatial plan	0	0	Q1 2013		Enlist Editors of local press as Ambassadors
	Limerick Local Heroes	As part of strategic agreement, agree route to deliver broader messaging about Limerick via network and specifically to tourism, retail and business	0	0	Q1 2013		
	Be a local tourist/Open Doors Limerick	Open attractions and facilities for local people to enjoy and experience free of charge – including non-tourist eg UL, LIT once a month/quarter/year	?	?	Q2 2013	New Limerick Marketing Company / Limerick Newspapers	Gain agreement from majority of venues

Project	Description	Uses/Capacity/ Area	Public Cost	Private Investment	Time-scale	Lead Responsibility	First Steps
	Gateway Signage	Install new gateway signs for each major road and rail junction and at Shannon Airport inline with the new proposition and story	€20,000	?	Q2 2013	Limerick Local Authorities in partnership with providers	Assess budget implications and external funding options
	Gateway Welcome	Investment in Shannon Airport, Limerick Bus & Coach stations and Limerick Train station with place photography	€15,000 contributi on	?	Q2 2013	New Limerick Marketing Company in partnership with providers	Meet with relevant partners to present proposition
Animate the City Centre	Street Ambassadors	Ensure street ambassadors are aware of the City's wider economic offer and able to tell the new story	0	0	Q2 2013		
	City Art	Provide public space for young people and students to showcase creative art including graffiii art	?	?	Q3 2013	Limerick Local Authorities	
	Pop up Shops	Open up more empty shop space to students and entrepreneurs for retail, art and food	?0	?	Q3 2013	Limerick Local Authorities	
	Lighting Strategy	Implement lighting on major monuments and buildings to illuminate City assets at night	?	?	Q3 2013	Limerick Local Authorities	
	Mid-Week Fridays	Online campaign to encourage more City Centre workers to eat in the City once a week after work – partnering with restaurants and bars	€500	0	Q2 2013		Liaise with City Centre/tourism/ leisure partnership groups
	Events Strategy	With partners, develop a place-wide events & festivals strategy; coordination, prioritisation and investment in type and messaging of events to promote the City Centre	Possible investme nt in events	Possible investment in events	Q2 2013	New Limerick Marketing Company	Audit of existing events against criteria for new quality standards and place

Project	Description	Uses/Capacity/ Area	Public Cost	Private Investment	Time-scale	Lead Responsibility	First Steps
		and wider area year-round including use as a business venue					proposition
National Place Marketing	Real Limerick Campaign	National media campaign utilising printed and on-line media using stories of real people from Limerick to tell a new story of the City with call to action to limerick.ie Supported on line via limerick.ie with 'Real Stories' of video clips	Research /Creative dev - €18,600 Media - €62,000	Possible in-kind support from local design agency	Q3 2013	New Limerick Marketing Company	Prepare brief and agree budget investment
	PR	Further investment in the current capacity to undertake more national PR including more familiarisation visits from trade professional and lifestyle media	€15,000	0	Q2 2013		Audit existing relationships and effectiveness
	City of Culture 2014	Ensure future promotion and messaging is aligned with new place proposition	0	0	2013-2014	New Limerick Marketing Company	Engage with lead organisation/ group
	The Gathering 2013	Work with lead partner(s) (TBC) in Limerick to ensure broader place marketing opportunities are exploited through individual activities/ events etc	?	?	2013	New Limerick Marketing Company	Engage with lead organisation/ group
	Place Partners – the key city organisations including: UL, LIT, Thomond Park	Agree joint interventions/activity to deliver more 'place-based' activity to enhance reputation and image of Limerick		0	By end Q3 2013	New Limerick Marketing Company	Draw up list of priority partners
	Postcards from Limerick	Partner with every accommodation provider to deliver ongoing communication with visitors – produce e-postcards and traditional	€10,000	0	Q2 2013	New Limerick Marketing Company / Limerick	Liaise with relevant business and tourism groups

Project	Description	Uses/Capacity/ Area	Public Cost	Private Investment	Time-scale	Lead Responsibility	First Steps
		postcards to regularly send with news from Limerick				Newspapers	
	Limerick Welcome	Provide each local accommodation provider with a copy of Limerick Storybook (suitably edited for external audience)	€2,500-€5,000	0	Q2 2013	New Limerick Marketing Company	
Investment/ Business Marketing	Alignment of messaging with lead agencies for inward investment	Engage with relevant agencies to ensure investment messaging is in line with economic plan and place proposition	0	0	By end Q2 2013	New Limerick Marketing Company	Present place proposition
	Limerick.ie	Develop further content on 'Business' pages to showcase existing business, facilities, success stories	€2,500	0	By end Q2 2013	New Limerick Marketing Company	Review content
	That's Limerick DVD	Develop shorter, business focused version of DVD (or extend existing DVD to include business)	€12,500	0	End Q3 2013	New Limerick Marketing Company	Review content
	Business & Investment Visitor Experience	With partners, agree and manage a 'business experience trail' for business and investment visitors to Limerick in order to showcase the best on offer and secure further interest in Limerick. Identify and agree key individuals to involve as hosts and investigate possible hosts of a permanent 'Investor Suite' to showcase Limerick at the start of visits	0	0	End Q4 2013	New Limerick Marketing Company	Meet with relevant partners and present place proposition
Tourism Marketing	Alignment of messaging with lead agencies for tourism marketing	Engage with relevant agencies to ensure tourism messaging is in line with economic plan and place proposition	0	0	End Q1 2013	New Limerick Marketing Company	Present place proposition

6.   Reference Materials

1.   Background evidence

Limerick's current image and brand is communicated through a range of mediums. This includes:

- Formal promotional material produced by inward investment and tourism agencies for the city and its region;

- Promotional material produced by universities, sports clubs, cultural institutions, hotels and retailers are part of ongoing marketing;

- Media messaging through city, county and national government;

- Civic, business and government leadership presentations in individual and group settings.

A wide range of promotional material has been produced with a variety of different key messages including:

- The Riverside City (Limerick City Council)

- Ireland's Vibrant Riverside City (discoverireland.com)

- A modern, riverside city (Shannon Development)

- Progressive City Centre (discoverireland.ie)

- Ireland's third city

- Capital of a dynamic region - the retail, business, financial, industrial, administrative and commercial heart of the Mid-West Region (limerick.ie)

- City of Sport (2011 designation)

- City of Culture (2014 designation)

- Warm, witty and welcoming (Shannon Development - tourism)

- A fun, forward-thinking and dynamic city where cultural, social and sporting events are at the cornerstone of everyday life (Limerick Institute of Technology)

- Limerick as a Place to Live and Study (University of Limerick)

- Experience Limerick – 25 Fun Things to Do – history, sport, shopping, eating and drinking (limerick.ie)

Beyond these headline strap-lines, the image and brand of Limerick is set by conditions and perceptions on the ground. The image of Limerick is undoubtedly varied. It reflects the range of strengths and challenges that have emerged across domains within this report. This range is reflected in the ways in which stakeholders talk about Limerick and in the ways it is viewed externally, particularly in media coverage. Key elements of this image include:

- Hi-tech employment clusters

- World class higher education

- European level sports

- Waterfront setting, history and fabric of the City Centre

- International name recognition

- Favourable inward investment climate

- Great people, committed locals

- Concentrations of deprivation

- High unemployment

- Vandalism, petty crime and organised crime

- Stalled sites that have not advanced in a decade

- Ongoing political competition

Current delivery channels and campaigns

The marketing of Limerick is primarily delivered as a secondary by-product of the marketing and communications activity undertaken by various organisations across the City through their own organisational marketing. The following organisations have some element of City marketing associated with their marketing and communication activities.

Limerick Communications Office

The Limerick Communications Office provides a concerted effort focused on the marketing of Limerick City in particular. Its activity is focussed primarily on public relations via media and social media and events such as Riverfest.

Limerick City Council & Limerick County Council fund partnership leads on the promotion of Limerick to external audiences. The office plans and executes various events in the City as a key route to attracting more people in to the City. Its functions include City Council PR and Mayoral speeches. It is a primary source of positive stories about Limerick and it is having a degree of success with the media in changing underlying opinions of the City. It does have a good reputation with the media and is trusted, a good foundation for the City to build on. Other key achievements include development of the successful site www.limerick.ie, the Street Ambassadors City Centre personnel (jointly funded with Shannon Development), various City-focused materials including the city map and Riverfest annually.

Shannon Development

Shannon Development also highlights Limerick through various marketing materials, particularly relating to tourism as part of the overall Shannon Region positioning. There is also a strong orientation to inward investment, business assistance and site specific promotion across Limerick City and the County as part of the promotion of the Shannon Region from an economic perspective.

Thomond Park

The home of Munster rugby, Thomond Park is promoted as a music and business venue as well as an international sporting venue. A key audience for the venue is international music and sporting promoters.

The Stadium Director has worked extensively with the City's hotels and the Communications Office to develop the quality of the City experience on Munster match days. Given the visibility of the stadium and the use of online information by visitors, this is an important potential resource for messaging about Limerick. However, current collateral for the Stadium does not include any sections about the City. The Stadium owners report a strong interest in a more active role in promotion of the City as a whole.

Limerick Institute of Technology

LIT has a high proportion of local and regional students, although it also draws from a national and an international catchment. LIT is likely to be a highly visited local website, and therefore a

key communication channel. The Institute's website addresses its home city prominently. "By coming to LIT, you will be among some 20,000 third level students in Limerick who are valued for their contribution to making the City the exciting, spirited and energetic place that it is. As a student you will discover that Limerick is a vibrant, young City that bustles as the commercial capital of the region. Limerick has something to offer everybody thanks to its many cultural, historical, architectural, sporting, shopping and business activities. With almost 50 per cent of Limerick's population under the age of 30, it is fast becoming a vibrant, living, cosmopolitan City. In the past decade Limerick has gone through a huge redevelopment drive that has transformed the City. Defined by the great River Shannon, the City has an attractive and modern urban centre with boutiques, cafés, and great off the beaten path shops, and a nightlife that will take you into the wee hours of the morning."

University of Limerick

With a significant international and national catchment, the University administration, press and marketing teams have an active interest in Limerick's reputation and image. The University's website is also likely to be one of the most visited websites, and a key channel for image and branding communications. As part of its 'Let Limerick Surprise You' messaging stream, the University of Limerick reports "Limerick is a Riverside City where the Shannon is an integral part of the City's character. Vibrant Limerick combines big City amenities with an innate friendliness – a mix that guarantees an attractive and welcoming environment for student living. The City boasts some fascinating historic sights, fashionable bars, charming old pubs, glossy shops, smart restaurants and boutique hotels". Marketing is strongly focused on the quality of education, the campus and career prospects in line with the University's core mission. This is, however, a further platform with global reach for promotion of Limerick in line with a core image and branding concept. The University has expressed a willingness to collaborate on marketing materials and events.

Hunt Museum

This is an important venue which show-cases local heritage and the famous Hunt family art collection. It is seen as a local and regional resource as well as a tourist destination. The Hunt Museum is highlighted in a wider range of tourist promotion material and in published tour guides such as the Rough Guide series. It is also highlighted on local tourist signage. The café is an active local facility, as well as a tourist amenity.

There is some wider marketing material available at the Hunt Museum. As one of the more visited local amenities, this is a key potential location for promotion of the City. There is an opportunity to view the Hunt Museum as an 'ambassador' institution, with a key role in the ongoing promotion of Limerick.

Limerick City Gallery of Art

Limerick City Gallery of Art is one of the leading contemporary art galleries in Ireland. It also offers an active programme of events and exhibitions but the website does not have links to wider Limerick promotional materials or information on the City. There is an opportunity to view the Limerick City Gallery of Art as an 'ambassador' institution, with a key role in the ongoing promotion of Limerick.

Limerick Local Heroes

This RTE-supported initiative is targeted at motivating citizens to get involved in affecting positive change in the City. One of several cities and towns across Ireland to join this RTE-led initiative, the Limerick Local Heroes programme will be showcased later this year on RTE in a series of programmes about the City and the group. Local participants we have met as part of this review have displayed a strong commitment to and belief in Limerick as a whole. The role of young people in particular will be critical to change perceptions of the City.

On-Line Coverage

The website ILoveLimerick.com is Limerick-centric with its current focus towards providing a voice for the community rather than overt marketing of the City. This website was created by local entrepreneur Richard Lynch to provide a platform for communities seeking support for projects. Over four years this entirely volunteer-delivered facility has built up a powerful profile locally, nationally and internationally, especially via social media with over 11,000 Facebook 'likes' and over 2,000 Twitter followers. The platform is overtly positive about the City, its people and its potential. The posted messages on the site will have an impact on anyone who finds the site via a web search.

The Rough Guide tourist website coverage of Limerick unfortunately begins with "Limerick is the least attractive county on Ireland's west coast", before highlighting the Hunt Museum and the natural beauty of surrounding of the rest of the West Coast. Other pages state that "County Limerick (Luimneach) divides itself largely between dairy farming on the fertile Munster plain and manufacturing along the River Shannon, though neither is likely to tempt you to stay here long". Although originally aimed at the independent traveller, such guides have a growing audience. A targeted campaign is required to seek publishers of such guides to increase the sophistication of coverage, as well as influencing the opinion of contributors.

2.   The New Limerick Story

Why does Limerick need a Story?

Limerick has an attractive and impressive waterside setting on the River Shannon, a rich and proud heritage as part of Ireland's history, an envied higher education offer, a vibrant cultural and sporting offer and sits in the heart of the lush countryside of County Limerick. However, over the years, the City and wider area has lost its distinctive identity and sense of place. Following the loss of several major employers, a concentration of well reported social and crime issues, a number of stalled developments and a lack of investment in the City Centre core, the City has seen both its image and physical appearance decline.

However, Limerick's future is now much brighter; a new, single authority is being formed from the existing local government structures, providing focus, clarity and new purpose; a new strategy to improve the economic prosperity and physical development of the City Centre is adopted; local stakeholders across all sectors are unified in their ambitions to help Limerick re-establish its reputation; and the significant business, sporting, cultural and academic assets of the City recognise the value of collaboration behind the Limerick offer.

Therefore Limerick now has the opportunity and potential to shape its future to deliver improved facilities and economic prosperity for all of its residents. However to achieve this Limerick must have a clear proposition and offer that defines why it is special, what it has to offer and why it should be considered and chosen as a place to live, work, visit, invest or study.

It is everyone's responsibility to be an ambassador for Limerick; no single organisation has the right or the resource to be accountable for developing Limerick's reputation – it is all of our responsibilities. So this new proposition must be understood and owned by the people who matter most to Limerick – its residents, businesses and organisations so that it can then be communicated to the new people and businesses Limerick hopes to attract.

The story of 'new Limerick' is a narrative focused on what makes the place distinctive and is a shared reference of how Limerick wants to be known and seen in the future.

This story will complement the planned physical changes and developments envisaged in the Economic and Spatial Plan and will provide the basis to deliver a consistent and positive positioning of Limerick which over time will improve and reflect Limerick's true image and reputation.

Making Limerick the hero

We all want Limerick to be successful; to attract people to live in the area, encourage those here already to stay, persuade investors and developers to see us as a place worth investing in, create and attract new jobs whilst keeping the ones we have, and increase the number of people

visiting. At the same time it is important to raise ambition and aspiration amongst local residents, young people and businesses. Our success will be determined by the choices people make about Limerick and we need to encourage them to view us in a positive light by explaining why we are special, how we are improving, what we offer and our plans for the future. We need to get on their 'short list' of places to consider.

Of course, many other places are doing the same, so we will have to work smarter, differently and in partnership to be successful and this story of 'new Limerick' will make it easier to deliver our message with clarity and consistency.

It is important to remember that a person considering us as a place usually has a number of options in mind. Before they add us to their list they need to have a good feeling of what the place is all about, what sort of reputation it has, what it is known for, what experience they might have there and what's different to do and see. Because it's people who are making these choices, and the decision is often as much about emotion as facts, it's important to ensure that they have a good 'feel' about Limerick as a place.

Our story will help make Limerick the hero, by characterising and championing what makes our place special and different and communicating this through our words and images.

So, over time the story will come to shape everyone's emotional and practical experience of Limerick. What's more, by seeking to influence how we do things in the City and surrounding area, it does not need to cost any more money to make a difference – this is about fresh thinking, not big budgets. It will give us a clear direction for how the City and surrounding area should change and grow, and why people should put it on their list of places to be.

Limerick is a special place

We have taken a long hard look at where Limerick is now and where it wants to be in the future so that we can articulate what's special about it and what we need to focus on in order to be chosen. We are now clear on why we are special and how we are different.

Our new story makes the place the hero, captures the essence of the City and Region together and is at the heart of how we are going to get ourselves 'on the map' for the right reasons.

It is unlikely the words that represent this new thinking about why we are special will be seen by our customers – they describe the essence of the 'new Limerick' as opposed to marketing slogans. They will determine how we develop our proposition through the way we communicate, what we build, the environment we create and the way we behave. Whilst some describe what we have and the way we are now, they also reflect what we want and need to be in the future – so our approach is both aspirational and realistic.

Sitting at the centre of this new thinking is the central idea of:

Limerick: Authentic~Innovative~Progressive

As the economic driving force of the region, Limerick needs to 'step up to the plate' and reassert its role as Ireland's third City with a distinctive and competitive story to tell. The City has exceptional assets and character which when aligned with the wider area creates a compelling proposition.

What is needed is a celebration of what is special, confidence in portraying Limerick both to residents and externally, self belief in making things happen, risk taking in 'doing things differently', a forward looking approach in what we aim for, joined up thinking and working, and energy in how we deliver. These are the new behaviours that will create a 'new Limerick'.

Whilst the area has some presence in growth sectors including ICT and advanced manufacturing, we must not be complacent if we are to create new jobs for our people and future generations. We must proactively look to the future for additional and new employment that is linked to these sectors and also to the city's outstanding higher education facilities, new low carbon enterprises and digital industries. Elsewhere, other jobs may be linked to tourism, leisure, sport and events as we look to exploit our countryside and attractions, facilities and pedigree in this growing area of the economy. Most critically we must look to new horizons and have the courage of our beliefs to pursue a new economic future for the City region.

For Limerick, quality must be our watchword in everything we do. We're competing nationally and globally in many things and the standards we set, the experience we provide, the facilities we develop and the services we deliver must be comparable with the best. If we are to thrive and provide all the people in the City region with a better life experience, we need to recognise that those looking to invest, visit, study or live have a choice and we have to 'up our game' to get on their shortlist.

This compelling idea of **Limerick: Authentic~Innovative~Progressive** *is supported by four themes that illustrate how we are different and articulate reasons why we should be chosen as a place. These will help to drive the transformation of our image, reputation and experience. Once again these are not marketing messages but fresh thinking that helps set priorities and provide focus.*

Knowledge and Enterprise; describes the powerhouse of assets offered by Limerick in its higher education institutions and the area's ambitions to build on its industrious past and put business first. With global profile, each higher education institution adds academic, research and creative wealth to Limerick and their collective value to the economy can not be over stated. New businesses and existing businesses recognise the value of such assets; for the talent they produce, the research skills and knowledge they provide, the facilities offered and the energy and vibrancy of young people. Aligned with this, are the new ambitions to make Limerick an outstanding environment for starting and growing new businesses and to position Limerick as a competitive

knowledge economy. Together these represent a powerful chapter of the 'new Limerick' story, especially for potential employers and investors in the knowledge economy.

Green and Sustainable; Low carbon development is an important part of our new economic plan and we intend to rapidly exploit the fact that we are 'well placed' to grow this aspect of the economy as a mainstay for enterprise and entrepreneurship. However, our green credentials and ambitions do not stop there. The City is surrounded by lush countryside and has many important green spaces within it. We are keen to bring the countryside into the City and will be ambitious in pursuing plans to achieve this. Whilst sustainability is now a critical strategy for all cities, Limerick will be working extra hard to ensure that it exploits its credentials in this for the benefit of the economy and the quality of life for residents.

Attractive and Historic; Limerick's history, rooted in the Vikings and the Walled City on Kings Island, its role in the defiance against the English and through its partial gentrification in Georgian times provide the City with a rich physical tapestry that is still very much part of the City's offer. King John's Castle, the River Shannon and Kings Island are still dominant features of the City's visitor offer and the Georgian neighbourhoods still very much part of the City Centre landscape. However, it is important that Limerick now builds on that history and maximises its attractive waterscape setting; the riverside needs to be brought back into every day use for residents and visitors alike by the City turning itself around to face the River again. And the historic core of the Georgian Quarter must be treasured and transformed to make it a viable and useful asset for a 21st Century City.

Creative and Vibrant; Limerick has an astonishing number of cultural, sporting, artistic and musical assets, events and venues. From the world famous Munster, playing at Thomond Park, to the international EVA Festival to more local celebrations of culture such as the Pig and Porter, the City and surrounding area seem to have something to celebrate almost every day of the year! But there is desire to build on the festivals and events across Limerick with better linked and promoted activity. A major beneficiary of such an approach will be our City Centre as we seek to develop it as a 'destination experience' not just a shopping centre. We see it as important to add life, fun, colour and animation, making it Ireland's 'urban playground'. This will encourage people to visit the City for special events and promote more use of our other cultural assets such as the Hunt Museum and the City Gallery of Art.

This is a Limerick that is more confident and looking to its future. It is a place that is proud of its illustrious past, yet with the chance to make use of that legacy to create an exciting tomorrow. It is a City Region that is going to celebrate its many special things yet is determined to look outwards as it makes its way. We're aspiring to be the best. All places have their time and this is ours.

Where do we go from here?

Having taken a long hard look at Limerick, its surrounding area and future opportunities the 'new story' articulates what's special and different about it. It helps to make the place the hero, captures the essence of our place and is at the heart of how Limerick can get itself 'on the map' for the right reasons.

It is easy to take these positive things for granted and not 'talk up' Limerick, but people need to be much more active and assertive in presenting the new Limerick story.

The central idea and themes describe the proposition of the story of 'new Limerick'. They are not marketing slogans but they should be a prime consideration when developing any messages and propositions about Limerick.

They are the agreed key areas of difference for Limerick compared with places and form the building blocks for bringing the 'new story' to life. By including it in websites and brochures when describing the area, subtle references in PR and tweets about Limerick, including Limerick as part of standard presentations, slowly and surely people's perceptions will begin to change.

The 'new story' will help everyone to be clear about what Limerick has to offer and what areas need to be focused on for the City and Region to become better known and chosen by more people.

Limerick is now looking forward with confidence and enthusiasm. It has an exciting opportunity to change and a real desire to encourage and welcome development and business. Limerick is a place that wants to reach its full potential, offer a great experience and show a united front.

Proud of where it has come from and excited about where it can get to. With belief, confidence, looking outwards and working together now is the time for Limerick to seize its opportunity and become the place it wants to be.

Appendix 3

Employment Target Rationale

The Economic and Spatial Plan for Limerick identifies an employment ambition of 12,000 full time equivalent jobs across the Limerick area, with 5,000 new jobs in the Central City. These are estimates for job growth in line with the timeframe for the masterplan across the new metropolitan area to 2030.

Setting the Scale of Employment Growth

While this represents 700 jobs per year, this also represents an annual employment growth rate of 2% per year starting from the 33,600 jobs identified by the 2011 Census.

While the Irish economy has slowed significantly since peak performance, there is an emerging consensus that growth from the current base can be expected in the future. The Irish Government's Budget 2013: Economic and Fiscal Outlook provides a comparison of macroeconomic forecasts GNP growth for Ireland for 2014-2015. This highlights three recent forecasts:

IMF	Aug 2012	2.7%
Reuters Consensus	Nov 2012	2.6%
Department of Finance	Dec 2012	2.7%

PWC Global Economy Watch Projections project real GDP growth in 2014 of 2% and an average annual rate of growth for 2015 to 2019 of 2.7%. Within this context, it is reasonable to set a target rate of job growth of 2% per year.

Identifying Employment Growth Sources

This plan identifies a number of key sectors that will underpin economic and employment growth in Limerick. These include the following sectors and recommended employment growth targets to 2030:

Established Sectors: 3,000 jobs

- ICT/Electronics

- High Tech/Manufacturing

- Logistics and Distribution

- High Value Food and Drink

Growth Sectors: 5,000 jobs

- Life sciences

- Business and Professional Services

- Tourism, Sport and Leisure

Emerging Sectors: 500 jobs

- Low Carbon Sector

New Sectors: 500 jobs

- Cultural, Creative and Digital Media

The unique circumstances of Limerick also point to employment growth in two further sectors:

- Higher Education: 500 jobs

- Retail: 500 jobs

This represents 10,000 of the 12,000 jobs target. It can be expected that there will also be growth in construction and public sector jobs as the economy and public finances recover, particularly after 2020.

Relating Employment Growth to Key Central City Development Schemes

The spatial plan has identified a number of specific Central City locations where employment growth is expected as part of major schemes.

A scale of development has been identified for new workspaces, teaching facilities and shops. Each has a potential employment output associated with them. The following summarises major components and the employment associated with them. This is based on typical employment densities.

Table 29: Major components and the employment associated with them

Project	Type	SQM	Job Density/SQM	Employment
Medi Park Site	Research	12,000	20	600
Opera Site	Innovation	10,000	30	330
Opera Site	Office	10,000	20	500
Arthur's Quay	Retail	22,500	30	750
Visitor Destination	Culture	13,200	40	330
Waterfront Leisure	Leisure/Hotel	26,000	30	850
Eastern Gateway	Mixed Use	10,500	40	250
Urban Science Park S	Research/Office	10,000	30	330
Urban Science Park N	Research/Office	10,000	20	250

These sites allow for approximately 4,190 jobs. It can also be expected that growth through renovation and targeted infill development associated with background economic development and property investment in the City Centre will increase this, potentially to 6,000 jobs.

Employment Growth in the Wider Limerick Metropolitan Area

It is expected that a number of the established higher valued added economic sectors will grow at or in similar facilities to their current locations. The established sectors and growth sectors can be expected to further their presence in locations such as Raheen and Dooradoyle, Castleroy and Plassey, Newscastle West and Shannon. While location specific predictions cannot be made at this point, it would not be unreasonable to expected 2,000 to 3,000 jobs to emerge at such locations by 2030.

It should also be noted that ongoing growth at third level / higher education institutions in the Limerick area will also generate its own growth in teaching, research, student service and administrative staff.

Construction Employment

The ambition encapsulated in the Economic and Spatial Plan for Limerick entails ongoing and long term transformation of much of its physical capital. In addition to the site specific projects identified above a number of other capital projects are likely between now and 2030. These include:

- A new public Waterfront

- A new Arthur's Quay Park and City Square

- Street realignment and reprogramming around Arthur's Quay

- On-going streetscape improvements

- Georgian Quarter renovation

- LIT campus masterplan delivery

It can be expected that site specific, infrastructure and background construction employment will generate more than 500 - 1,000 jobs per year for the period 2015 t0 2030.

Conclusion

This analysis does not allocate every job to every sector and every site for the period to 2030. However a rebuilding of confidence in the long-term prospects of the wider Irish economy, an optimistic view of the sectoral underpinning of the Limerick economy and an emerging view of near and medium term site specific and infrastructure projects is used here to justify and provide a rationale for growth of up to 12,000 jobs by 2030.