

Limerick 2030

An Economic and Spatial Plan for Limerick

JANUARY 2015



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'Cities have the capability of providing something for everybody, only because, and only when, they are created by everybody'

Jane Jacobs

'Cities are the places where people meet to exchange ideas, trade or simply relax and enjoy themselves. A City's domain-streets, squares and parks – is the stage and the catalyst for these activities'

Richard Rogers

'The City is recruited from the Country'

Ralph Waldo Emerson

Executive Summary

1.0 Introduction

This is an executive summary of the first Economic and Spatial Plan for Limerick. It sets a framework for public sector action and private sector investment until 2030. Although it is a medium to long term strategy it sets the direction for early projects to be implemented which will kick start the renaissance process.

There are 3 elements to the Plan. The first is an Economic Strategy which identifies how Limerick needs to be positioned in order to best take advantage of economic opportunities in order to build a stronger local economy through the creation of employment and the attraction of investment. The second element is a Spatial Plan focussed on revitalising and redeveloping Limerick City Centre and the final element is a Marketing Plan which aims to use Limerick's unique and positive attributes to change perceptions of how Limerick is viewed.

The Plan has addressed economic, social and physical features of the City and County as a whole. It has taken account of the Regeneration programmes, and uses much of the work that has already been completed or is underway as a starting point – though challenging and adjusting where it is appropriate to do so. It has involved extensive engagement with public, business and voluntary sector stakeholders, and allowed a clear vision for Limerick to be defined, drawing on Limerick's strengths and addressing challenges faced into the future.

Limerick faces many challenges – but none of these are unique in a post-industrial era. Many cities have made, or are making a similar transition. All have done so on the back of a shared 'Plan for the Future' that has first realised the City's problems and then pointed the way forward economically and spatially. Limerick needs the same. It is the dawn of a new era.

2.0 Vision

The Plan seeks to deliver a new Vision for Limerick:

“Limerick will become a major economic force in the Irish and European economy, a leading centre for commercial investment – both foreign direct investment and endogenous business growth, capitalising on the strength of its higher education institutions (HEIs), the skills of its workforce and its environmental and heritage attributes. The City Centre will be at the heart of this economic force – an attractive magnet for retail, leisure, residential, commercial, educational and cultural growth. Growth will benefit all citizens across the City, County and Mid-West Region.”

Central to Limerick's success in the future will be the strength and sustainability of its economy which will need to build on its assets and be robust and diverse enough to perform alongside Irish,

European and worldwide competitors, creating a strong post-industrial economy City Region driven by a multi-sectoral approach.

3.0 A Revived Economy

Economically, the aim is to ensure that the City and County focus on all market sectors where a competitive edge exists, maximising the amount of foreign direct investment secured, supporting innovation, enterprise and start-ups, and developing and diversifying the skills and knowledge of the population. This will mean bespoke investment in infrastructure and ensuring that Limerick fully utilises its existing assets, including its three higher education institutions.

The central aspiration is to create and attract highly productive knowledge-based employment and to diversify the economy as part of an overall effort to bridge the productivity gap.

To fulfil this aspiration Limerick needs to capture elements of economic sectors which are clustering elsewhere. Limerick will be able to offer a competitive proposition by virtue of its skills and research and development assets and its regenerated City Centre.

The Economic Strategy for Limerick seeks to tackle a number of challenges:

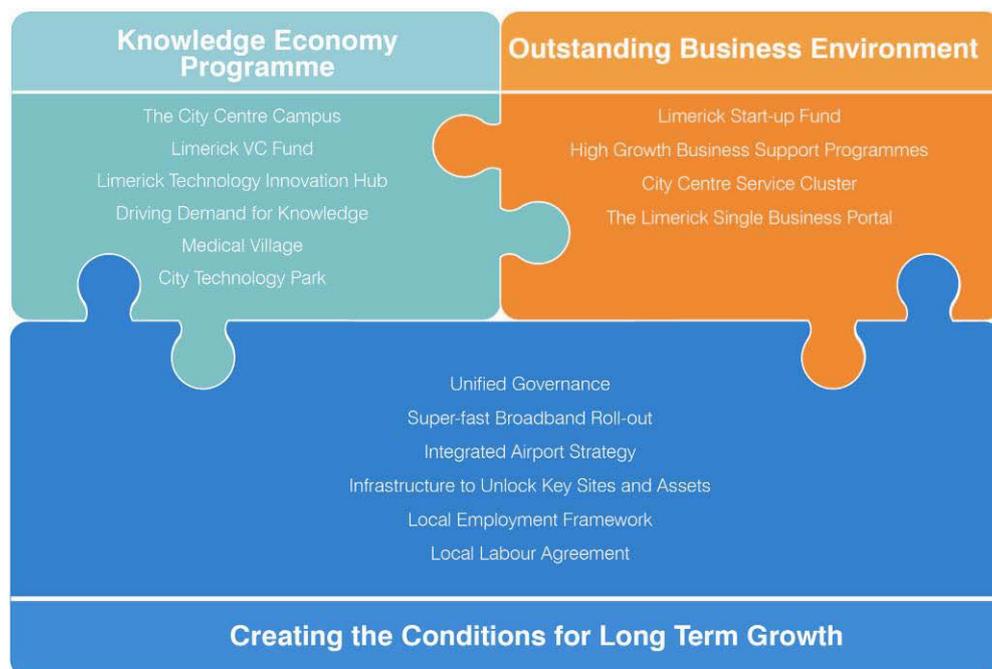
- Grow and diversify the Limerick economy;
- Increase demand for the City Centre and bring more people and economic activity back into the Centre;
- Create a range of complementary employment opportunities across the City and County, taking account of locational and market advantages, particularly having regard to the areas of the City within the Limerick Regeneration Framework Implementation Plan;
- Reverse recent trends and capture a bigger share of high value knowledge-based employment in Limerick;
- Maximise the impact from Limerick's ICT/Digital assets, knowledge and reputation;
- The City and County must become known for the knowledge economy across a range of sectors and as a place of endogenous business growth, not just FDI;
- The City and County must dramatically improve the infrastructure for economic growth and capture more benefit from its economic assets; and
- Establish an economic governance and delivery structure that reflects the interests of Limerick as a whole and which channels national priorities effectively at local level.

The Economic Strategy will be delivered and implemented **through the pursuit of five interrelated objectives**, which address these challenges:

1. Position Limerick as a competitive knowledge economy, known for its skills base excellence in high tech sectors;
2. Develop an outstanding environment for starting and growing new businesses;
3. Create the conditions for long-term economic growth;
4. Create a vibrant City Centre economy with a new mix of economic uses and a strong education presence; and
5. Maximise the local employment impact from development/regeneration.

An analysis of Limerick’s current industrial structure has highlighted that there are some established and mature sectors which are still able to deliver further growth in niche areas, other sectors where Limerick needs to capture a bigger share of forecast growth and certain emerging sectors where investment can pay longer-term dividends. There is also potential for new growth as part of a City Centre cluster of related and mutually re-enforcing sectors for which a City Centre environment is attractive.

The Economic Strategy which seeks to meet these objectives takes the form of three inter-related components:- **‘Strengthening the knowledge economy’**, **‘Creating an outstanding business environment’** and the adoption of a set of interventions which **‘Create the conditions for long-term growth’**.



Spatially, different parts of the City and County will make complementary contributions. Each business park or neighborhood will play its part, bringing local as well as city and regional benefits.

The business role of the City Centre needs to be clear - meeting the needs of businesses in defined sectors and meeting the quality of life expectation of business leaders, employers and employees and their families. This business role of the City Centre should be complemented by economic development investment at key locations across the County, most notably at Newcastle West, Askeaton, Kilmallock and Foynes.

By addressing its economy in this way, Limerick should seek to become Ireland's most business friendly City, with investors overwhelmed by the quality of service and support that the city provides to facilitate inward investment and encourage business growth.

4.0 A New City Centre Spatial Plan

The Spatial Plan will ensure that the City Centre fulfills its full economic potential by becoming a desirable place in which to 'do business'. The ambition is to create a city and centre that can attract new inward business investment and encourage the formation of new local businesses by providing high quality, flexible space to meet accommodation requirements and ensuring the necessary business support structures are in place.

The City Centre should be at the heart of the wider economic strategy for Limerick, developing its role as a place of creativity, culture and consumption. It is the 'shop window' for Limerick. Its role will not just be about providing the accommodation and infrastructure, but also providing the 'quality of life' factors so important to investors, employers and skilled workers. Many of the ingredients and inherent attributes necessary to be successful are in place – the Spatial Plan seeks to take advantage of these.

There needs to be a focus on a range of specific projects and programmes, including new development and redevelopment projects. Further enhancements to the fabric of the City Centre are also required: the renovation of the Georgian Quarter and other heritage assets; further public realm and transport improvements, and improved City management and positioning.

Regardless of expectations there is no 'silver bullet', no single initiative that will transform the City Centre. Success will require clarity of vision, organisation and implementation and a series of integrated projects and initiatives that together make the difference. Success will also require commitment from a wide range of stakeholders including various government departments, the business community, higher educational institutes and local communities amongst others etc.

The Spatial Plan for the City Centre addresses **8 key objectives**:

1. To establish a **21st Century City Centre economy capable** of competing with other European cities and leading the wider City, Metropolitan Area and City-Region economy;
2. To **reposition the City Centre as the premier regional shopping destination**;
3. To establish a **unique tourism** offer that takes full advantage of the City Centre's special heritage and environmental characteristics;
4. To make the City Centre once **again a desirable place to live** by improving the quality of the housing offer in the City Centre;
5. To create a **high quality and safe urban environment** attractive to investors, employers, residents and tourists which generates a sense of pride in the City;
6. To build upon the City Centre's rich historic character by fully **capturing this rich heritage, protecting and enhancing** it where appropriate and complementing it with world class design for any new development;
7. To create **quality strategic gateways to the City Centre**, thereby making it a welcoming experience for visitors; and
8. To **attract and retain young people by providing learning opportunities** through the co-operation of the University of Limerick, Limerick Institute of Technology and Mary Immaculate College, in providing teaching and residential accommodation in the heart of the City Centre.

Over the next 15-17 years the City Centre Spatial Plan will deliver against these objectives. The renaissance of the City Centre requires the delivery of a series of inter-related interventions. The success of each intervention will depend upon the delivery of others. For example, the desire to strengthen the City's shopping offer will depend upon increasing economic development activity, attracting private sector investment, an enhanced culture and leisure programme, improvements to the physical environment, an enhanced tourism offer, etc. Equally an improved shopping offer is a pre-requisite to the successful attraction of new businesses, tourists, etc.

Whilst much can be achieved by improved organisation, partnership between public and private sector and improved leadership, the renaissance of the City Centre will require a substantial investment in the built environment, the City's infrastructure and its public realm.

As a start Limerick needs to get the fundamentals in place around business, shopping and living opportunities. It needs better infrastructure and public realm to make it a 'comfortable' and 'appealing' City Centre. However, to achieve its full potential it needs to embrace a series of **transformational projects complemented by a programme of employment enhancing interventions addressing the shopping, business and residential markets, plus a programme of improvements to the public realm and City Centre infrastructure.**

The Spatial Plan is structured as follows:

- **Seven City Centre transformational projects;**
- **Enhancing the City Centre retail offer;**
- **A new business offer;**
- **Expanding the residential opportunity; and**
- **Infrastructure/public realm investment.**

It is illustrated in Figure 1.

The cost of delivering the Spatial Plan in the City Centre is estimated at €250 million over the lifetime of the Plan and it is expected to be primarily funded by private sector investment.

4.1 City Centre Transformational Projects

These transformational projects have been defined as:

1. **A 'World Class' Waterfront – a renaissance of Limerick's entire Waterfront;**
2. **The 'Limerick Cultural Centre' – an iconic destination building on the Waterfront;**
3. **'Great streets' – a transformation of the City's three main streets – O'Connell Street, Catherine Street and Henry Street;**
4. **A new City Square/Plaza – to define the focal point or 'heart' of the City Centre;**
5. **A City Centre higher education campus - the creation of a multi-versity combining facilities from Limerick Institute of Technology, University of Limerick and Mary Immaculate College in the heart of the City Centre;**
6. **Renewal of the Georgian Quarter – a concentrated programme to restore the Georgian part of the City to its former glory; and**
7. **Colbert Station renewal – a new public transport interchange and enhanced station environment.**

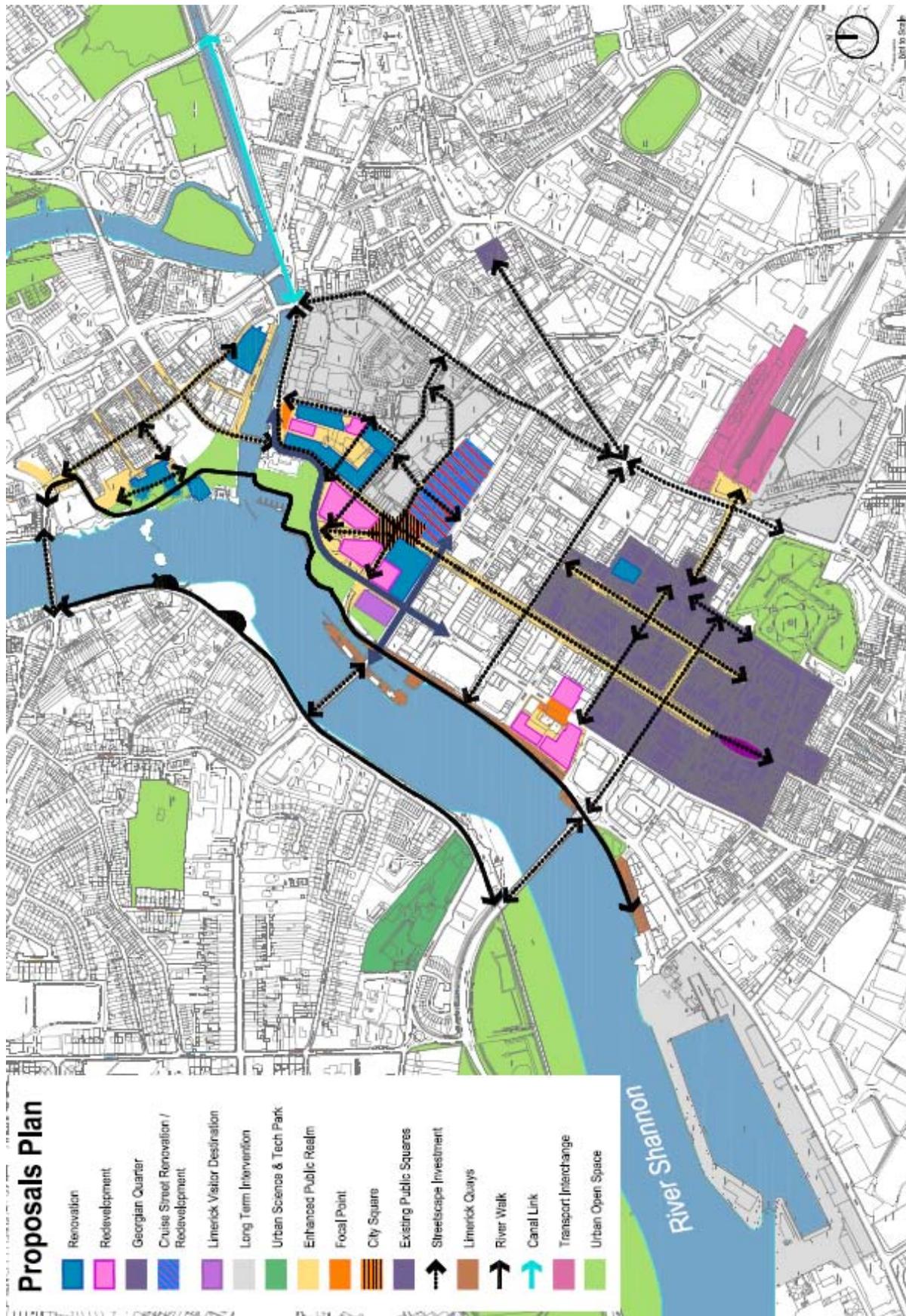


Figure 1: Overall City Centre Spatial Plan



Figure 2: City Centre Proposals – Aerial View

4.2 Enhancing the City Centre Retail Offer

A central component of the Spatial Plan is to re-establish the City Centre at the top of the shopping hierarchy by improving the range and quality of shopping on offer, in the context of a much improved experience of visiting the City Centre as a whole. This picks up the ambition of the City Centre Strategy, 2008.

This ambition can only be achieved by radically improving the shopping experience in the prime shopping area – in the vicinity of Brown Thomas, Debenhams / Penneys, Arthur’s Quay Shopping Centre and Cruises Street. This is the location that the major multiple retailers will wish to locate – the focal point of the shopping quarter. A comprehensive redevelopment project is advocated for the Arthur’s Quay area, including the park and creating a new City Square. Longer-term the capital plan envisages the redevelopment or comprehensive refurbishment of the Cruises Street shopping street. The Plan also supports the refurbishment and expansion of the Debenhams and Penneys stores.

It is not appropriate to seek to position multiples any significant distance from this zone. In this respect most of the Opera Site is not in the prime shopping location, although supplementary shopping and leisure can be included at the southern end of the Site as a component of a business-led mixed use solution for this Site.

Figure 3: Photomontage of Potential City Centre Square and new retail development



4.3 A New Business Offer

This Plan reflects the important business role of the City Centre by encouraging business uses in several locations across the City Centre. The Opera Site is a major opportunity site for new business activity – tying into the heart of the City’s shopping offer. The Plan envisages that a key component of this mix would be an ‘Innovation Hub’ closely aligned to new higher education facilities, providing graduation space for fledgling businesses as highlighted in the economic strategy. The Plan advocates detailed consideration of the removal and redevelopment of Sarsfield House, currently occupied by the Revenue Commissioners. This could generate a pre-let to help kick-start the redevelopment of the Opera Site.

Secondly, the revitalisation of the Georgian Quarter is intended to reinforce the cluster of important professional service businesses already located there, benefiting from good access to the railway station and ready access by car.

There is also potential to reinforce Henry Street and the Waterfront as a business location. This can be achieved by the redevelopment of the site at Bishop’s Quay for mixed use, complementing the ‘Hanging Garden’ Site directly opposite on Henry Street.

The Economic Strategy identifies the need for an ‘urban’ Science and Technology Park as part of the wider offer. The suggested alternative location for this could be the former ‘Cleeves’ Site at the entrance to the Shannon Bridge on the north side of the River; or to the south of Colbert Station, or at the Docks south of Steamboat Quay. Further detailed analysis is required to test the feasibility of delivery at these locations.

The Plan also advocates the delivery of the Medical-Park concept in the George’s Quay area, backing onto Mary Street and linked to the existing Barringtons Hospital. This could include treatment, research and teaching, with a special emphasis on urban public health issues and bring a number of institutions and private sectors activities together.

Figure 4: Photomontage of potential new commercial offices on the Opera Site



4.4 Expanding the Residential Offer

The most significant area of opportunity for encouraging more City Centre living and a diversification to include primarily owner occupation in the City Centre is in the Georgian Quarter, though the refurbishment of the Georgian housing stock. A pilot scheme is required to demonstrate the potential and prove the market. The *Living Cities Initiative* published by the Department of Finance in February 2013 is an important first step in incentivising the revitalisation of Georgian Limerick.

The development of residential accommodation in the City Centre by the third level institutions for students, post graduates and academic staff can make a significant contribution to increased City Centre living.

4.5 Infrastructure/Public Realm Investment

A series of co-ordinated improvements are proposed for the City Centre transport infrastructure and public realm.

Now is the appropriate time to re-assess the existing and the proposed traffic system for the City Centre. The concept of the Orbital Route and the related plans were instigated ahead of the completion of the Shannon Tunnel and thus before the beneficial impact of allowing traffic to bypass the City Centre.

The City Centre transport strategy should seek to:

- Put pedestrians first throughout the City Centre – wider pavements, wider crossing points, etc;
- Remove as much extraneous car traffic from the City Centre as possible;
- Improved management of on-street parking;
- Remove one-way traffic where possible, but especially on Henry Street and Lower Mallow Street;
- Reduce the impact of car traffic along the Quays;
- Enable the creation of a new City Square or Plaza in the vicinity of Arthur's Quay and Cruises Street;
- Manage the traffic flows on O'Connell Street and accommodating the new City Square;
- Adopt the 'smarter travel' principles that have been formulated for the City Centre;
- Accommodate a new/improved connection between the City Centre and the University of Limerick campus for pedestrians, cyclists and public transport users;
- Reduce the dominance of over-sized road signs across the City;

- Adopt a coherent pedestrian signing and way-finding system for the City Centre; and
- Create the conditions where Limerick City gains a reputation as a safe and easy place for pedestrians to use and as a green transport City.

This will be complemented by a new public realm strategy which should comprise the principal components:

- A network of public squares or plazas across the City Centre – connected and promoted as a collective. These could include:
 - A new City Square on O’Connell Street;
 - A new Plaza at Potato Market and in front of the City Hall on King’s Island;
 - An enhancement of Bank Place as a public space;
 - An internal Square in the redeveloped Opera Site; and
 - A new Plaza in front of Colbert Station.
- Better connections to John’s Square, the Crescent and Baker Place;
- A new river walk along the quayside as part of a the riverside improvement strategy;
- Enhancements to Davis Street, Glenworth Street and Catherine Street connecting the station to the central shopping area;
- Enhanced connections to John’s Square and in the vicinity of the Milk Market;
- Enhanced public realm in the vicinity of King John’s Castle and along Nicholas Street; and
- Renovation of the Park Canal to allow it to fulfil its potential as a valuable waterside amenity and an important link between the City Centre and the University of Limerick.
- Green Infrastructure measures shall be incorporated into any public realm strategy.

Figure 5: Photomontage of potential new public realm and park at Arthur’s Quay





Figure 6: City Centre Proposals – Aerial View

5.0 Marketing of Limerick

It is essential that a coordinated effort is made to market and rebrand Limerick. The new 'place proposition' for Limerick is based on the model of a central idea and associated themes - informing, directing and aligning activity, and thus ensuring a consistency of message about the City. It can also be used to inform the wider aspects of the Limerick experience; the physical environment (public realm, etc), the products/services (businesses, attractions, etc) and behaviour (City welcome, etc).

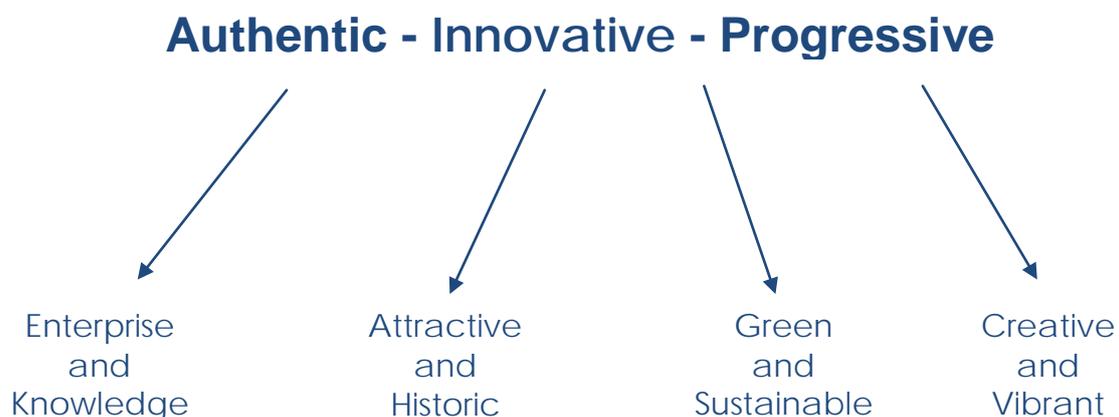
Drawing upon the insight, knowledge and opinion gathered through workshops, interviews, and wider research, the new proposition:

- states confidently and assertively the strengths and attributes of Limerick;
- challenges false beliefs about Limerick people and place;
- surprises with a new statement about Limerick, its ambitions and its purpose;
- supports the City's new economic ambitions; and
- complements and joins up sector-specific propositions and messages.

And in its delivery, the proposition for Limerick reflects the following themes:

- 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; and
- newly unified, coherent and as one.

This comes together in the strategic, motivational and inspirational statement of intent.



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

This is in essence, a promise of what Limerick is, how it works and what it wants to be famous for. It embodies the cultural essence of Limerick as:

- An authentic place of substance with an impressive industrial and historic heritage;
- A place of authentic and innovative people – genuine, natural, real, welcoming, friendly, leaders and achievers;
- A place that has an innovative, progressive outlook to knowledge and innovation – look at our education and business assets; and
- A place that continues to exploit its natural resources with innovative and progressive ambition – low carbon economy, enhancing its green credentials.

6.0 Outputs

There is the potential to generate over 12,000 FTE jobs, new jobs in the Limerick area based on the sectors identified. The emphasis on high value jobs would go a considerable way to closing the €403m gap in economic performance by rebalancing the local economy to a knowledge economy to better reflect the wider Irish economy.

The potential for approximately 5,000 new jobs has been identified for the City Centre. This would include higher value jobs linked to key sectors identified by the Economic Strategy at locations such as the Medical Park at King's Island, the Opera Site, the Colbert Station area, etc. The Limerick Quays have the potential to accommodate additional office employment, as well as hotel and leisure employment. New jobs would also be generated by net additional retail development at Arthur's Quay in particular. A new visitor destination would also generate new employment.

Wider reinvigoration of the City Centre can be expected as the cumulative effect of major renovations, new development, increased activity and footfall and new residents is realised. Wider and secondary economic impacts can be expected from this activity.

In housing terms, the potential for a minimum of 800-1,000 new homes has been identified. The wider invigoration of the City Centre can be expected to lead to organic and private sector-led development activity which could substantially increase housing outputs. Renovation and conversion activity will extend across the Georgian Quarter. Irish Town also offers the opportunity for renovation and infill development in the longer term.

7.0 Implementation

An ambitious plan is of little use unless there is a strong commitment to deliver it. It is therefore imperative that work on implementing this Plan commences immediately. The delivery of **Limerick 2030** will require a combined effort by the public, private and voluntary sectors. However, this process will need to be spearheaded and co-ordinated by Limerick City and County Councils. It is the local authorities who will build consensus, commitment and momentum behind the programme.

The delivery of the redevelopment of Limerick City Centre, estimated at €250 million, is part of a wider and more ambitious €750 million Limerick project to deliver improved economic infrastructure including new third level educational facilities, new port facilities along the Shannon Estuary and new infrastructure at Shannon International Airport over the next two decades. This major investment programme will require funding from a range of sources including the private sector, philanthropic bodies, government agencies and Departments, the European Commission and potentially the European Investment Bank.

The Plan is a very focused approach to deliver over a 15-17 year plus time scale. It recognises that not every aspect of the plan can be delivered at once but that priorities have to be established. Some of these priorities are thematic and relate to the wider economic strategy, whilst others are physical and relate to the delivery of the Spatial Plan for the City, especially the City Centre.

Aside from the need to advance amendments to the transport and public realm, priority needs to be attached to the delivery of several important development projects, namely the Opera Site, Waterfront and the Arthur's Quay area. These are priorities for a number of reasons, including location at the heart of the City Centre, the fact that the Opera Site is largely in public ownership and thirdly because there is need to both attract new business activity to the City Centre, and to address the structural failings in the retail sector.

There is need to consider different funding mechanisms including the JESSICA (European Investment Bank) funding programme, and Tax Increment Finance. In addition the plan identifies the advantages of establishing three Tax incentive regimes – one to encourage commercial development, one to facilitate private sector investment in the renewal of the Georgian Quarter and the third to encourage economic development investment in defined locations in the Regeneration Areas in the City.

The local authorities will be responsible for setting and implementing policy, coordinating available responses to opportunities for public sector funding and, making the case for additional funding. The local authorities will need to oversee the implementation of tax incentive regimes, as well as making full use of available land and property assets and, undertaking the necessary technical assessment to ensure feasibility and deliverability. A key requirement however will be to co-ordinate engagement with the private sector - developers, investors and employers - and bring the necessary level of private investment to bear.

A number of steps need to be implemented immediately in order to give momentum and focus to the delivery of this plan, namely:-

- The establishment of a high-level economic group to drive strategic elements of the Plan;
- The preparation of a detailed master-plan for the development of the Opera Site;
- The preparation of a detailed master-plan for the Arthur's Quay Area;
- The preparation of City Centre Transport and Public Realm strategies;
- The preparation of strategic development and marketing plans to encourage enterprise development on Shannon Development owned lands in County Limerick;
- The creation of an Innovation Hub to help to recapture Limerick's reputation for innovation and creativity; and
- The establishment of a dedicated Marketing Company to position and market Limerick.

The vision set out in this Plan is ambitious in its intent and in its scale. However, with the proper support and commitment from a coalition of stakeholders, it is realistic and it is deliverable.

Limerick is a special place - with a unique history, heritage and culture. Its people are resourceful and proud. The challenges faced today will be overcome. The implementation of this Plan will help to deliver a brighter future for all.

1. Introduction

- 1.1 Limerick is entering an important phase of its history as the third City in Ireland. It has a new unitary governance structure as Limerick City and County Councils merged to form Limerick City and County Council and this year is the national 'City of Culture'. With a population approaching 100,000 people and being the principal urban centre of the Mid-West, Limerick City has a major role in defining the economic fortunes of the Region, as well as Ireland as a whole. It is widely recognised that it has under performed in this role for a number of decades.
- 1.2 Indeed Limerick has been in decline as a commercial centre over the last 10-20 years. This decline is most evident in the City Centre which has been undermined by competition from out-of-centre development – both shopping and business development and by an imbalance in business rates between City and County. The problem has been exacerbated as jobs in these suburban locations have been relocated to cheaper locations in Eastern Europe and elsewhere.



Limerick's Waterfront



O'Connell Street retail core



Recent developments



Recent public realm improvements

-
- 1.3 To an extent this decline has been mirrored by a fracturing across different facets of the City – a break down in relations between the private and public sector, the failure of the private sector to speak as one voice and the lack of co-ordination across the public sector as solutions are sought.
- 1.4 **Nonetheless, these matters can be addressed and the future potential of Limerick is significant given its heritage, its environmental attributes, its culture and its key asset - its people.**
- 1.5 **A key step in helping to realise this potential is the formulation of a single Economic and Spatial Plan for Limerick as a whole, and for its City Centre in particular. This will guide change and investment, and inform a new perspective on Limerick internationally as well as nationally, regionally and locally. The plan presented in this report is referred to as Limerick 2030.**
- 1.6 This Economic and Spatial Plan defines and addresses the City's strengths and challenges. A consistent, integrated and long-term approach can achieve real gains in the economy, quality of place and quality of life across the City, benefiting the wider County and City region. An integrated approach addressing economic, spatial and marketing issues is required to maximise gains for all parts of the City, County and Mid-West Region, and for all sections of the community. The priorities that have been established seek to differentiate the City economically from its competitors. The aspiration has been to provide certainty to the public sector, investors and local people alike.
- 1.7 The plan defines the boundary for the Limerick Metropolitan Area to include the existing City, plus the Southern Environs Local Area Plan and the Castletroy Local Area Plan areas. This is illustrated in Section 3. The exercise though recognises the importance of the wider Mid West Regional Planning Guidelines and the City Centre is as defined by the Limerick City Development Plan (2010-2016).

2. Vision and Guiding Principles

2.1 The analysis underpinning this Economic and Spatial Plan (Appendix 1) has addressed economic, social and physical features of the City and County as a whole. It has taken account of the Regeneration Programmes and uses much of the excellent work that has already been completed or is underway as a starting point – challenging and adjusting where appropriate to do so. It has involved extensive engagement with public, business and voluntary sector stakeholders, and allowed a clear vision for Limerick to be defined, drawing on the following strengths and addressing challenges faced into the future.

Table 1: Strengths and Challenges

Strengths	Challenges
<ul style="list-style-type: none"> • Good access – at a regional, national and international level, including an International Airport nearby; • An established economic base across ICT, High Tech Manufacturing and Life Sciences; • World class higher education institutions (HEIs); • A dramatic Waterfront setting, a strong heritage and high quality urban fabric, in parts of the City Centre; • Within one of Europe’s most visited tourist regions, with global reach; • International name recognition; • Strong association with professional, amateur and student sports; • Energetic and committed cultural leadership and institutions; • Established Regeneration Programmes • Presence of a working port within the City. 	<ul style="list-style-type: none"> • Economic and property market uncertainty – fuelling a lack of demand, especially in the City Centre; • Long term unemployment and concentrations of socio-economic deprivation; • A City Centre in decline (high and increasing vacancy levels); • A legacy of historic buildings that are costly to refurbish; • A lack of facilities in the City Centre – performance venue, cinema etc; • High visibility of stalled sites across the metropolitan area, including in the heart of the City Centre; • Negative perception within Ireland and harsh internal perceptions; • Absence of shared vision and economic direction; • Lack of coordination and leadership spanning economic direction, tourism strategy, marketing; • Fragmented image and branding management.

2.2 It is recognized that vision statements have been presented before, but this is the first time a City vision has been set to guide a holistic Economic and Spatial Plan for Limerick. The Spatial Plan takes advantage of strengths, tackles challenges and enables delivery of a City vision:

“Limerick will become a major economic force in the Irish and European economy, a leading centre for commercial investment – both foreign direct investment and endogenous business growth, capitalising on the strength of its higher education

institutions, the skills of its workforce and its environment and heritage attributes. The City Centre will be at the heart of this economic force – an attractive magnet for retail, leisure, residential, commercial and cultural growth. Growth will benefit all citizens across the City, County and Mid-West Region.”



Access to an International Airport

Georgian legacy



A sporting pedigree

Independent shopping

2.3 The plan has been defined by five drivers of success for Limerick.

Figure 7: Plan defined by five drivers



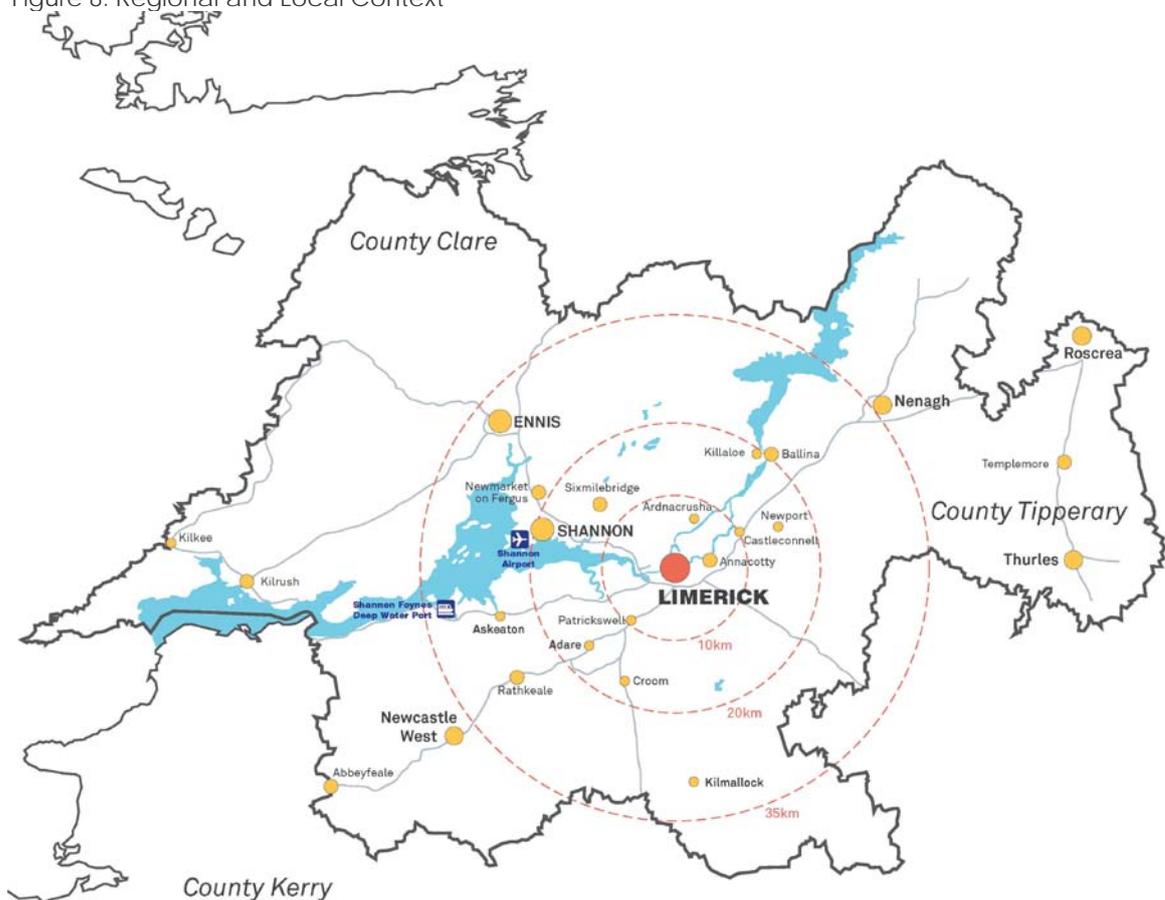
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- 2.4 These drivers sit at the heart of every aspect this plan. They are reminders of what is required to achieve the renaissance of Limerick. This plan seeks to enhance each of these aspects. However, central is strong leadership – a pre-requisite for success in every Major city.
- 2.5 Also central to Limerick’s success in the future will be the strength and sustainability of its economy, which will need to be robust and diverse enough to perform alongside Irish, European and worldwide competitors, creating a strong post-industrial economy driven by a multi-sectoral approach. This seeks to capture the inherent business and competitive advantages of Limerick as a whole and of specific places individually.
- 2.6 The Economic Strategy within the Plan builds upon the good work already underway to support innovation, enterprise and start-ups, developing and diversifying the skills and knowledge of the population, investment in infrastructure and utilising existing assets, including the three higher education institutions.
- 2.7 The Spatial Plan seeks to ensure that the City Centre in particular fulfills its full economic potential by becoming a desirable place in which ‘do business’. The ambition is to create a City Centre that can attract new inward business investment and encourage the formation of new local businesses by providing high quality, flexible spaces to meet the demands of business and ensuring that the necessary business support structures are in place. It must also develop its role as a place of creativity, culture and consumption. It is the ‘shop window’ for Limerick. Its role will not just be about providing the accommodation and infrastructure but also providing the ‘quality of life’ factors so important to investors, employers and skilled workers. The City Centre has many of the ingredients and inherent attributes necessary to be successful – the strategy seeks to take advantage of these.
- 2.8 Limerick should seek to become Ireland’s most business friendly City, with investors overwhelmed by the service that the City provides to facilitate inward investment and encourage business growth. In the context of the recommended economic strategy the business role of the City Centre needs to be clear - meeting the needs of businesses in defined sectors and meeting the quality of life expectation of business leaders, employers, employees and their families.
- 2.9 There needs to be a focus on a number of specific projects, and programmes including new development and redevelopment projects. In addition, further enhancements are required to the fabric of the City Centre addressing: the renovation of the Georgian Quarter and other heritage assets; further public realm and transport improvements, and improved City management and positioning.
-

3. Reviving Limerick's Economy: Analysis

'The key to economic growth lies not just in the ability to attract the creative class, but to translate that underlying advantage into creative economic outcomes in the form of new ideas, new high-tech businesses and regional growth.' **Richard Florida**

- 3.1 The Economic Strategy sets the direction for the economy of Limerick and determines the ambition and the key objectives around scale, structure and value of the economy. The strategy also provides the economic rationale for the interventions proposed in the Spatial Plan and is the structure to ensure that all elements (whether hard physical infrastructure or softer business development programmes) pull in the same direction and reinforce each other to achieve the strategic objectives.
- 3.2 The Strategy recognises the critical importance a successful Limerick has for the wider Mid-West Region – placing Limerick and its City Centre at the economic heart of the Mid-West Region, but also recognising the key role that other locations across the City and County can play.

Figure 8: Regional and Local Context



Analysis

A Timely Opportunity and a New Economic Geography

- 3.3 In 2011, the Minister for the Environment, Community and Local Government (DoECLG) established the Limerick Reorganisation Implementation Group (LRIG) to oversee the creation of a new single local authority by June 2014. The Terms of Reference, including the following, gave a clear statement regarding where the emphasis of the Economic Strategy should be:

"...maximise the capacity of local government to contribute to the economic development of Limerick and the Mid-West Region and in particular to enhance the role of Limerick City as a generator of growth and a strong and dynamic focus for development of the wider region..."

- 3.4 In support of this objective the proposal stated that the City boundary should be extended to include urbanised parts of the County adjacent to the City to give an overall population of around 100,000. The establishment of a new single local authority with an increased population seeks to create a new critical mass and a new economic geography. It is 'a once in a generation opportunity' to make a step-change in the economic fortunes of Limerick and drive new levels of employment and economic growth. This is further reinforced by other organisational changes that have been announced in 2012, in particular, the decision by the Government to separate Shannon Airport from the Dublin Airport Authority (DAA) and to transfer the existing economic development role of Shannon Development to IDA/Enterprise Ireland (EI).

The Limerick Metropolitan Area (LMA)

- 3.5 For the purposes of this plan the LMA comprises the original Limerick City boundary in addition to the urban and partially urban areas within the Southern Environs Local Plan Area and the Castletroy Local Plan Area. This is represented in Figure 9.
- 3.6 All data presented in this report for the Limerick Metropolitan Area (LMA) as defined is representative of the area shown in the map and has been collected from Census 2011 data for Small Areas. It has been developed for this report and is not an officially defined boundary.

Figure 9: Limerick Metropolitan Area



3.7 This section focuses on the most significant findings which have informed the economic strategy of the plan. A more detailed socio-economic analysis is provided in Appendix 1.

Characteristics of the new geography...a better performing economy and labour market

3.8 The latest core employment data from the 2011 Census is shown below and highlights the difference that the new geography makes in employment terms.

Table 2: Core employment data

Source 2011 Census	Limerick City	Limerick County	New Met Area	Ireland
Population	57,106	134,703	95,242	4,588,252
Working Age (15-64)	39,336	90,078	66,954	3,073,269
Working Age (15+)	46,875	105,870	77,171	3,608,662
Employed (jobs)	18,419	52,622	33,606	1,861,300
Unemployed	7,394	11,143	9,356	317,400
Labour Force	25,813	63,765	42,962	2,178,700
Participation rate (in labour force)	55.1%	60.2%	55.6%	60.3
Unemployment Rate	28.6	17.5	21.7	14.6
Employment Rate	47%	58%*	50%	60.5%

Source: Census 2011 and AECOM Analysis

*The all Ireland average is also 58%

Official Census definitions are shown below:

- **Employed:** Persons who worked in the week before Census Day for one hour or more for payment or profit, including work on the family farm or business and all persons who had a job but were not at work because of illness, holiday etc. in the week.
- **Unemployment:** Persons who, in the week before Census Day, were without work and available for work within the next two weeks, and had taken specific steps, in the preceding four weeks, to find work.
- **Labour Force:** Comprises persons aged 15 years and over at work, unemployed (having lost or given up previous job) and looking for first regular job.
- **Unemployment Rate:** The proportion of the Labour Force that are not in employment but are actively seeking employment.
- **Participation (in Labour Force) Rate:** The number of persons in the labour force expressed as a percentage of the population aged 15 years and over.
- **The employment rate** has been added by AECOM for illustrative and comparison purposes and is the number of people in employment expressed as a proportion of the working age population.

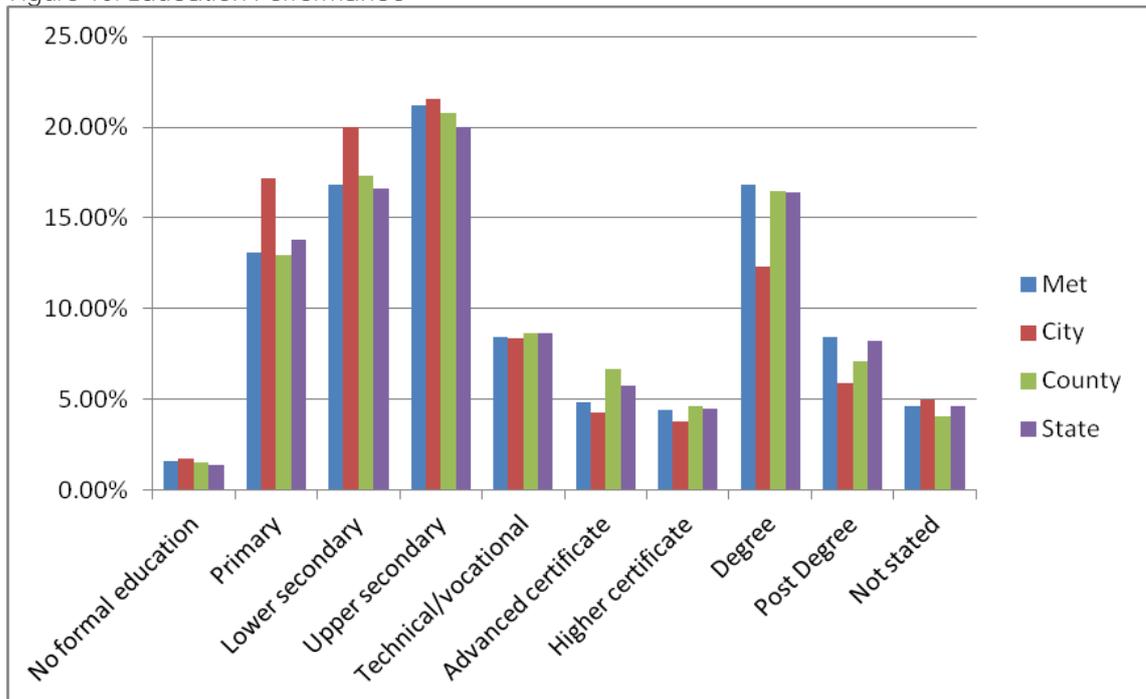
3.9 The new Limerick Metropolitan Area has a population of 95,242, which is just under the 100,000 ambition set out in the LRIG terms of reference. Nevertheless, this is a significant increase on the 57,106 figure which is the population of Limerick City defined by the previous boundary, and gives a genuine 'City scale' where greater economies of scale and agglomeration will be possible.

3.10 There are also important changes regarding the labour market characteristics of the new population. A labour force of just under 43,000 at LMA level (those in employment plus those available to work) represents a big increase from the City level figure of 25,813. The labour force has therefore increased but the unemployment rate has reduced by 7%. This is perhaps the most telling statistic and demonstrates that the new local authority population now includes greater numbers of those currently in employment and available/ready for employment.

Stronger Skills and Education Performance

3.11 Education levels across the Limerick Metropolitan Area are higher on average than for the previous City and County areas. At Metropolitan Area level 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.

Figure 10: Education Performance



Source: Census 2011 and AECOM Analysis

- 3.12 Looking at occupation levels and the skills of 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%.

Table 3: Occupational Level

Occupational Level	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

Implications for Strategy on Employment and Skills

- 3.13 It can be concluded that the new LMA has a better performing employment, education, skills and occupational profile than the Limerick City area as defined by earlier boundaries

(already stated). This highlights the opportunity to draw on a larger and more economically mobile labour force to drive a new economic strategy for Limerick.

Limerick is losing out to other areas in inward investment.....

- 3.14 Inward investment in Ireland is an important source of new business growth. 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.
- 3.15 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 become a location for global 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.
- 3.16 Conversely, Limerick had been the focus of FDI in IT Manufacturing. As a sector this has constantly shifted towards lower-cost locations, most recently in Eastern Europe and the Far East. This has been to the detriment of Limerick which had seen its labour and business costs rise prior to the recession.
- 3.17 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 the 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.
- 3.18 Across Ireland the Mid-West has been the worst performing region in terms of 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 4 below presents the real change in IDA supported jobs in Limerick between 2007 and 2011.

Table 4: IDA Ireland Jobs Created and Lost in Limerick from 2007 to 2011

	2007	2008	2009	2010	2011	2012
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>

3.19 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 11 below 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 FDI inflows, which seem to have favoured Dublin, Cork and Galway.

Figure 11: Relative FDI jobs performance by area



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

3.20 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.

Implications for Strategy on inward investment

3.21 There is widespread disappointment in Limerick at the relatively poor FDI performance over recent years. There is however a degree of consensus amongst stakeholders that the IDA, the local authority and the higher education institutions could work together more effectively to sell the area to potential investors. This of course requires new structures and agreements for engagement at a senior level and this is addressed in the Economic Strategy and as part of the structure for the new Economic Development and Planning Directorate of the local authority.

3.22 The IDA clustering policy is not deemed to be effective for Limerick, where an emphasis on a broad sector approach to promote innovation and interaction with distinctive strengths in ICT and Digital is needed. Limerick should capture elements of sectors which are clustering elsewhere based on a competitive proposition focussed on its skills, R&D assets and a regenerated City Centre.

Limerick is facing a €403 million productivity gap

- 3.23 The wider Limerick area (City and County combined) contains within it some of the less affluent parts of Ireland and in recent years this has been compounded by significant job losses. It is clear now that the Region had an over-reliance on construction related employment which contracted by 61% across the Region between 2007 and 2011 bringing a loss of 13,800 jobs. Consequently 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.
- 3.24 Gross Value Added (GVA) data for 2010 show that the Mid-West is underperforming the State as a whole by around €4,239 per head per year. If the Mid-West Region were able to drive national average level GVA per head rates then given the population of the Mid-West it would drive an additional €1.53 billion annually if GVA per head were at the national average, at the LMA level this productivity gap is around €403 million annually.
- 3.25 The sectoral structure of the Mid-West economy explains much of this productivity gap with a greater representation of low GVA primary industries (agriculture, forestry and fishing) rather than higher GVA services (market and non-market).

Table 5: 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

- 3.26 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 Limerick 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 6: 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)	99.4%	97%	100%
Disposable Income per Person (excluding Rent) (Euro)	19,972	19,471	19,877
Index of Disposable Income per Person (State=100)	100.5%	98%	100%

Source: Ireland Central Statistics Office – Incomes by Region

Implications of the productivity gap

- 3.27 A strategy to create and attract highly productive knowledge based employment and diversify the economy is required as part of an overall effort to bridge the productivity gap. This will be a central requirement of the Economic Strategy for Limerick.

Summary of economic analysis for Limerick Metropolitan Area

- 3.28 The analysis of the new economic geography in this section highlights some key findings which have implications for the Economic Strategy for Limerick, most notably:
- Local authority reorganisation means that the Limerick Metropolitan Area has a greater critical mass of population, a larger labour force and more economically mobile labour force and lower unemployment;
 - The Metropolitan Area skills base is stronger and the workforce has a better, more highly skilled occupation profile than the previous City boundary;
 - Limerick currently loses out to other areas in Ireland for inward investment, and the spatial clustering strategy adopted by IDA does not help Limerick; and
 - There is a €403 million productivity gap between what Limerick does produce and what it could produce with its current population if it were performing at the Ireland average for GVA per head. Bridging this productivity gap over the next decade should be seen as a minimum economic target for Limerick.
- 3.29 Drawing together this analysis and our research and consultation throughout the strategy process has produced the overall economic SWOT which helped to frame the Economic Strategy of the Plan.

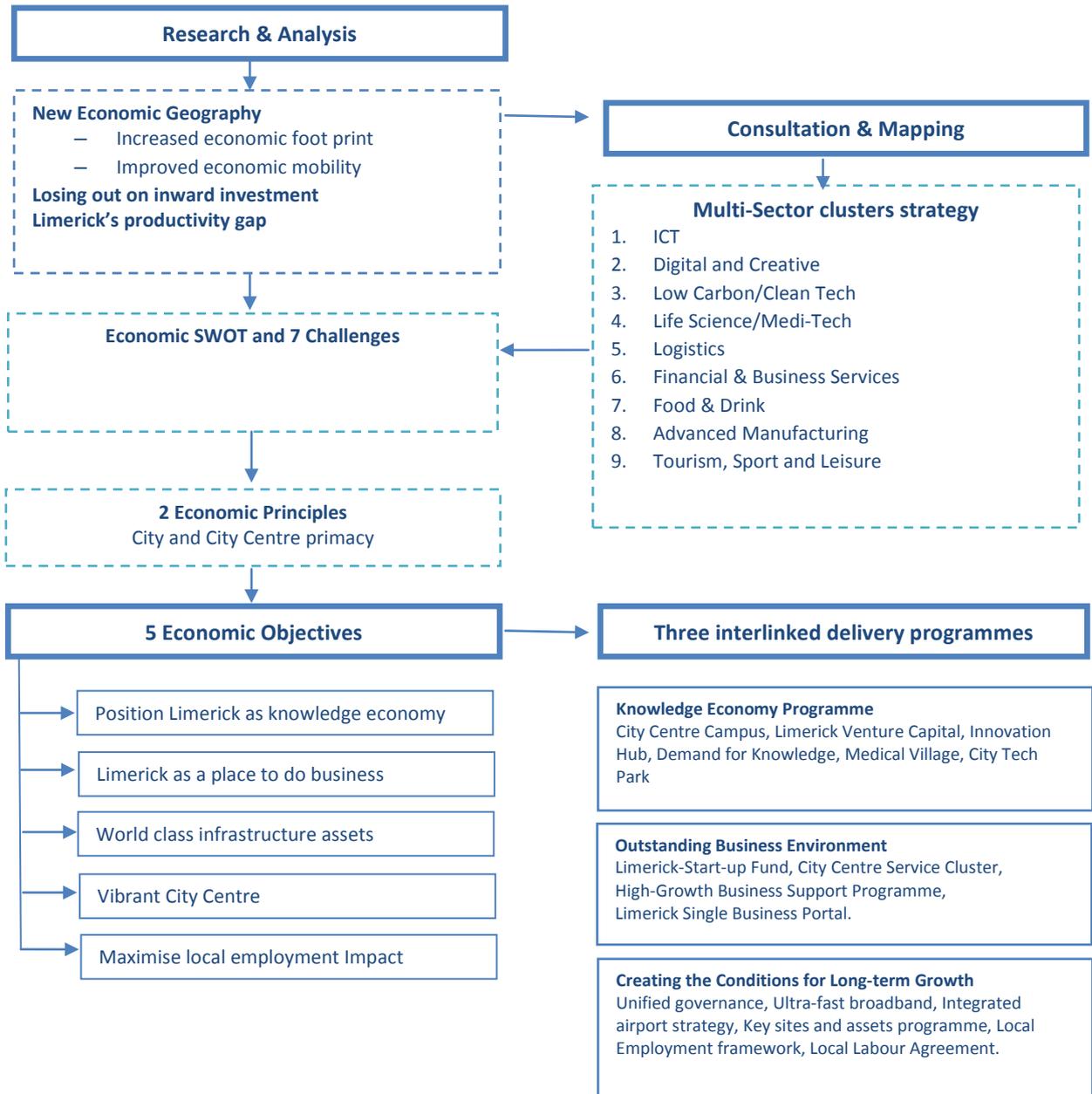
Table 7: Summary economic SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • Strong education assets – UL/LIT/MIC • Sector specific research capacity including ICT, Life Science, Clean Tech and Digital Media • Other distinct education assets - Teacher Training, Architecture, Fashion (top world 50 Limerick School of Art and Design) etc • Established high tech sectors in ICT, Medi-Tech, Advanced Manufacturing and Engineering, Food and Drink • Business and science parks within City • Distinctive City Centre environment • Established incubators and start-up and mentoring support programmes • Lively evening economy in parts of the City Centre • Shannon Airport • Well established economic links with U.S • Improved road links to Dublin and other Irish Cities • Sporting pedigree/Munster Rugby • Degree of tourism activity • Limerick Docks and Shannon Esturay 	<ul style="list-style-type: none"> • Duplicative and fragmented business support and enterprise offer • Territorialism and lack of joined-up thinking between partners • Reduction in resources available for economic development • Lack of established growth sectors, undermining FDI • Perceived poor image of Limerick City • Average digital infrastructure by international standards • High pockets of unemployment and deprivation within City (and new metropolitan area) boundary • Educational underperformance • Underutilised City Centre and declining retail offer in face of out of centre competition • Track record of favouring out of town development
Opportunities	Threats
<ul style="list-style-type: none"> • Local Authority re-organisation • Wider organisation/rationalisation of economic development structures • New economic geography with critical mass for economic intervention • Change of ownership of Shannon Airport • High quality historic and physical assets in City Centre – currently underutilised • Major City Centre site opportunities • Creation of new distinctive business locations in the City Centre • Creation of a new City Centre education campus • Adjustment of City Centre business rates • Creation of a new City Centre cluster: <ul style="list-style-type: none"> • Business and Professional services • International Financial Services • Creative Industries/new Digital • Education • Government/Public Services • Media/Fashion/Independent Retail • City Centre Retail • Tourism • Evening Economy • Strengthen multi-sector knowledge clusters • Innovation opportunities as sectors converge and use common technology platforms • Development of strong logistics and low carbon sector across the Mid-West which would benefit Limerick • Designation of National City of Culture 2014 • Regeneration Programme providing significant investment in certain areas of the City 	<ul style="list-style-type: none"> • Poor or low quality development in City Centre • Inappropriate out of centre retail and leisure development undermining City Centre • Failure to achieve stakeholder consensus around key strategic priorities • Lack of strategic leadership at City level • Spatial divergence: Organisations working to different geographies undermining the strategy • Continued economic recession and low economic growth in Eurozone • Reduction in FDI opportunities • Continued population decline in the City and City Centre • Failure to keep pace with internationally competitive broadband speeds

4. Reviving Limerick’s Economy: Strategy

The Overarching Economic Strategy

4.1 The analysis has defined the economic challenges facing Limerick. This strategy has five central objectives to guide Limerick economically and to transform its economic and competitive performance.



Limerick's seven economic challenges are as follows:

1. **Grow and Diversify the Limerick Economy.** The new Economic Development and Planning Directorate for Limerick City and County Councils must put measures in place to help to address the current trend which sees the Limerick economy contracting and losing ground to other Cities in Ireland. This will require a coordinated effort to increase in real terms both employment and GVA (to bridge the productivity gap) together with an increase in new business start-ups. This will involve increasing the economic footprint of the City, bringing new areas into productive use.
2. **Increase demand for the City Centre and bring more people and economic activity back into the Centre.** In recent years the City Centre has suffered from de-population and an erosion of the business and retail base. In a self perpetuating cycle the quality of the offer has decreased as footfall and population decreased in face of an ever increasing out of town offer. Recent effort to regenerate the City including Waterfront residential, retail and the public realm has had limited impact and in some cases has made the situation worse.
3. **Reverse recent trends and capture a bigger share of high value knowledge based employment in Limerick.** There is no alternative to pursuing a knowledge based economic strategy in Limerick. Local labour costs are too high to be competitive in low skilled sectors and those sectors which are forecast to grow significantly over the next two decades are all knowledge sectors requiring high skills. Whether through FDI or endogenous growth the knowledge economy is central to Limerick's long-term growth and prosperity.
4. **Maximise impact from Limerick's ICT/Digital assets, knowledge and reputation.** A distinctive feature of Limerick's economic structure is the depth of expertise in ICT and Digital sectors. This adds value to other sectors such as Logistic, Life Sciences, Advanced Manufacturing, and Financial and Business Services. Limerick needs to maximise the impact from these IT assets to help attract and embed high tech business across a range of sectors.
5. **The City must become known for the knowledge economy across a range of sectors and as a place of endogenous business growth, not just FDI.** Limerick suffers as it is not generally seen as a major knowledge economy investment location in the way that Dublin, Cork and Galway are. This situation persists despite the City's exceptional knowledge assets. This perception needs to change and having a more attractive and welcoming City Centre will help. In addition to FDI, it will be important for the City to drive growth through endogenous enterprise.
6. **The City must dramatically improve the infrastructure for economic growth and capture more benefit from its economic assets.** Currently Limerick does not see the type of

benefits a City might expect from world class higher education and an International Airport. The challenge is to improve infrastructure where it can unlock growth but also get a better return from the airport and higher education facilities, and secure 'best in class' in digital connectivity.

- 7. An economic governance and delivery structure that reflects the interests of the City and can channel National priorities effectively at local level.** It will be vital to address the fragmentation that exists within the economic development and business support agencies which have had separate and different spatial remits. Ensuring that National Agencies such as the IDA and EI effectively promote and support Limerick and respond to Limerick priorities will be a central theme going forward.

Economic Objectives

- 4.2 The Economic Strategy of the Plan will be delivered and implemented **through the pursuit of five interrelated objectives which** address the challenges set out above.

Table 8: Five interrelated Activities

Objectives	
1.	Position Limerick as a competitive knowledge economy, known for its skills base excellence in high tech sectors;
2.	Develop an outstanding environment for starting and growing new businesses;
3.	Create the conditions for long-term economic growth;
4.	Create a vibrant City Centre economy with a new mix of economic uses and a strong education presence; and
5.	Maximising local employment impact from development/regeneration.

- 1. Limerick will be a competitive knowledge economy known for its strong skills base and excellence in high-tech sectors and the knowledge economy**

- 4.3 Limerick will play to its strengths as a knowledge location and secure maximum return from its higher education facilities, building on the knowledge economy assets and business locations that will now be within the City boundary.

- 4.4 Limerick will create distinctive, accessible and competitive 'places' for the knowledge economy. These will not be geared to a single specific sector but designed to provide a first class environment for businesses with real potential for driving employment and productivity growth in the economy. In particular, the depth of expertise and assets in ICT, together with High-Tech Manufacturing, Logistics and Supply Chain Management, Food and Drink, Life Sciences, Financial and Business Services, Tourism, Fashion Design, Sport and Leisure, the Low Carbon Economy and Cultural/Creative/Digital Industries.

- 4.5 We are already seeing examples where convergence between ICT, Healthcare, Advanced Manufacturing, Electronics and Food Production are driving increased levels of

innovation, growth and real productivity benefits within Limerick. The aim here will be to stimulate and support this interaction to drive further value in the economy.

- 4.6 The strength will lie in creating a balanced and diversified economy of many strands rather than prioritising a single sector approach. There will be a number of knowledge economy locations across Limerick and the wider area each bringing different strengths and characteristics, these will include: the City Centre, Raheen/Dooradoyle, Castletroy/Plassey, Newcastle West and Shannon.

2. Create an outstanding environment for starting and growing businesses

- 4.7 Limerick already has a well-developed set of interventions designed to stimulate new enterprise both from within its further education institutions but also the policy programme through the City and County Enterprise Boards (soon to be merged into a Local Enterprise Office) and Enterprise Ireland. The priority for the new authority will be to bring these together to create a highly fertile environment for home grown start-ups and spin-outs, and for existing businesses wishing to expand and grow.
- 4.8 Limerick has an opportunity to be a location of choice for high technology new starts across a range of sectors. However, this will require further strengthening and alignment of the new business support offer to include a bespoke property offer, access to venture capital and best in class digital infrastructure.

3. Create world class infrastructure and assets

- 4.9 Research on Cities across the Globe tells us that the long-term economic performance of Cities is related to the quality of their assets. Limerick has world class education institutions, a historical City Centre, some high-tech business assets and an International Airport but Limerick has an opportunity now to strengthen these assets to underpin better economic performance. In addition by unlocking new employment sites and by improving others and by making the City Centre more attractive it will be possible to create an environment that will drive up demand for Limerick as an investment location, as a place to set up a new business, work, live and study.

4. Create a vibrant City Centre economy with a new mix of economic uses and a strong education presence

- 4.10 The knowledge economy demands proximity and interaction and thrives in high quality and lively urban environments. In particular, Business, Legal and Financial Services and the Creative and Digital Industries place a premium on being able to interact with customers, competitors and collaborators in related businesses. A lively, populated and animated City Centre creates an attractive location for employment in these sectors, furthermore in

successful City Centres the business and the City Centre 'consumption offer' (retail, food & drink, the evening economy and leisure) become mutually reinforcing.

- 4.11 In Limerick there is an opportunity to create a City Centre employment cluster comprising related business sectors for which a City Centre environment would be advantageous, this would include the businesses and creative businesses outlined above. The development of such a business cluster would certainly benefit from a small number of catalytic moves to drive up demand for City Centre space and create additional critical mass. The most promising opportunity would be to create a university/higher education facility or joint UL/LIT/MIC teaching facility in a prominent City Centre location. The economic impact of such a facility could be enhanced through the co-location of associated administrative functions and employment and by locating student accommodation in the City Centre.
- 4.12 Other similar moves worth consideration would include creating a concentration of public sector employment in the City Centre to drive up demand for business, shops and other services and create additional footfall. This approach might also include consolidating local authority and other government departments from across the Mid-West in the City Centre.

5. Maximising local employment impact from development/regeneration

- 4.13 There is a major opportunity to make an impact on local unemployment both as a consequence of physical redevelopment but also when, as is the case in Limerick, new public sector organisations are established or existing ones are relocated or re-structured. When the public sector is playing a key role in bringing about development there is an opportunity to target a proportion of new jobs to those living in areas of persistently high unemployment, accompanied by appropriate support and skills development. This approach also applies to procurement during the regeneration process and in the regeneration of the socially deprived areas of Limerick which can be geared towards maximising local impact. It is essential that such an approach embraces multiple sectors and covers a range of occupation levels from entry level jobs for the low skilled to some technical and intermediate level jobs.

Sector Strategy

- 4.14 Key to meeting these objectives is to diversify Limerick's sectoral strengths. Analysis of Limerick's current industrial structure highlighted that there are some established and mature sectors which are still able to deliver further growth in niche areas, other sectors where Limerick needs to capture a bigger share of forecast growth, some emerging sectors where investment may pay long-term dividends and finally, there is potential for new growth as part of a City Centre cluster of related and mutually re-enforcing sectors

for which a City Centre environment is attractive. These groupings are represented in Table 9 (More detail on the assets and opportunities for Limerick's key sectors is contained in Appendix 1 to this Report).

Table 9: Sector Strategy

Driving value in established sectors	Capture bigger share of growth sectors
<p>ICT /Electronics</p> <ul style="list-style-type: none"> • Software/ • Hardware Manufacture • Computer Services • Cyber Security • Cloud Computing/Data Storage <p>High Tech Manufacturing/Engineering</p> <ul style="list-style-type: none"> • High Value Manufacturing • Manufacture of consumer products • Electronics/Consumer Products <p>Logistics /Distribution</p> <ul style="list-style-type: none"> • Air Cargo Hub • Supply Chain Management • Aviation <p>High Value Food &Drink</p> <ul style="list-style-type: none"> • Agri-Food Sector • High Value Artisan Produce • Food/Pharma • Food Tourism 	<p>Life Sciences</p> <ul style="list-style-type: none"> • Pharmaceuticals/ Biopharmaceuticals • Nutraceuticals • Medical Devices • Healthcare <p>Business and Professional Services</p> <ul style="list-style-type: none"> • Legal, Financial and Property Services • International Tradable Services • Shared Services <p>Tourism, Sport &Leisure</p> <ul style="list-style-type: none"> • Visitor economy • Evening economy • Sports related visitor economy • Sports R&D • Sports marketing/PR
Secure investment in emerging sectors	New Enterprise Growth
<p>Low Carbon Sector</p> <ul style="list-style-type: none"> • Clean Tech • Smart Energy Systems • Green Energy/Wind/Ocean Energy • Green Construction • Environmental Services 	<p>Cultural, Creative and Digital Media</p> <ul style="list-style-type: none"> • Creative Industries • New Media/Social and Digital Media • Digital Animation/Gaming Technology/Music • Mobile Phones/Apps/Content • Graphic Design • Fashion • Incubator/Textiles/Independent Retail

A diverse knowledge base differentiated by strength and depth in ICT

- 4.15 The broad sector groupings identified above represent a considerable range of activities at different levels of knowledge and technology across multiple locations. For example ICT includes computer manufacture and electronics functions at Raheen/Doradoyle, R&D and software development at Castletroy/Plassey and software engineering and development at Shannon. Within the Life Science sector a wide range of activities can be identified from the manufacture of products used in Healthcare such as filters and valves to medical instrumentation to orthopaedic implants. The sector also extends from optical products to medical imaging and patient monitoring and the manufacture of pharmaceuticals and health related food and drink products. The Life Science sector in

Limerick demonstrates the varied nature of these businesses which cover a range of different technology levels and knowledge intensity, demonstrate high degrees of convergence with other sectors and also operate from various locations within Limerick and the Mid-West Region.

The Limerick Unique Selling Point (USP)

- 4.16 The greatest concentration of advantages is in ICT where Limerick can demonstrate an SME, R&D and skills base across many ICT sub-sectors, covering software, microelectronics, semi-conductors, digital, mobile technology/services. The wider geography also has multiple secure energy sources and is suitable to becoming a data storage location with multiple data centres and associated functions. This offer is further strengthened by the Irish Software Engineering Centre at UL and strong specialist and complementary undergraduate programmes at both UL and LIT. It is this strength and depth of the skills and asset base in ICT in Limerick which can further establish Limerick as an ICT location in its own right but also which adds value to other sectors. This Strategy proposes building on ICT as a key differentiator in the Sector Strategy.
- 4.17 Further evidence of the role of ICT is present when examining the level of convergence and overlap between the sectors which is a phenomenon that is encouraged in other successful knowledge locations. Some illustrative examples in Limerick might include:
- ICT and Healthcare on Digital Imaging and Patient Monitoring Services
 - ICT and Logistics brought together in Online Retail and Shared Customer Services and Supply Chain Management
 - ICT and Clean-Tech and Energy Management Systems
 - ICT and Digital is increasingly fundamental in a huge range of Advanced Manufacturing processes
 - Advanced Manufacturing and Life Science producing in Medical Instrumentation and Optical and Orthopaedic Products
 - Food and Drink/Agri-Food and Pharmaceutical serving the growing market for health related food and supplements – Nutraceuticals
 - Niche Food and Drink Production overlaps with Tourism and the City Centre offer.
- 4.18 These interactions between sectors are often the source of new products, services and innovation and ultimately productivity and employment growth in an economy. They also serve to embed clusters of activity in the economy creating a knowledge identity and reputation for Limerick which helps create a degree of confidence crucial for securing further growth, investment and FDI.

Limerick's Sector Strategy - Key Principles

- 4.19 Alongside the overarching Economic Strategy there needs to be a consensus amongst key agencies around the approach to sectors. We propose that this is championed and communicated by the new Economic Development and Planning Directorate alongside other elements of the Plan. This should also be the case in sectors such as Energy/Clean-Tech and Logistics where some key locations and assets will inevitably lie outside the new Limerick City boundary but which would still benefit from a much greater alignment of support and resources which is best overseen from the central Economic Development function.
- 4.20 Limerick's sectoral approach is about building on strengths, particularly in ICT, to create a diverse knowledge economy, but perhaps most importantly it is about breaking from the widespread tendency to assume that Limerick is excluded from key sectors that have clustered in other locations in Ireland. There is always an opportunity for Limerick to capture some elements of established sectors especially if there is a competitive offer based on a distinctive skills, an outstanding asset base and high quality digital infrastructure.
- Limerick should adopt a broad sector approach to help the move towards a diverse multi-sector economy;
 - Table 10 sets out the 9 broad sectors which will drive the Limerick and Mid-West economy over the next 10-15 years;
 - Limerick should maximise opportunities for innovation, interaction and convergence by creating highly competitive, well-connected multi-sector locations;
 - Limerick should build on its reputation in ICT and Digital Technologies to create and build knowledge clusters underpinned by best in class, ultra fast broadband; and
 - Limerick should not assume that they are excluded from competing in sectors where other competing locations have developed clusters supported by National agencies previously.
- 4.21 Table 10 illustrates some of the business activities within Limerick's key sectors across some of the major employment locations. It is not exhaustive but highlights the multi-faceted nature of each sector. The pink cells highlight where this Strategy has proposed establishing new interventions and clusters of activity for example vertically the City Centre Knowledge Cluster or horizontally the Low Carbon Economy/Clean Tech cluster which covers all employment locations including key regional assets such as the Shannon Estuary. The red text in a blue cell highlights where there maybe some further expansion of an existing sector.

Table 10: Sector Spatial Profile

	City Centre	Raheen /Dooradoyle	Castletroy/ Plassey	Newcastle West	Shannon
	IT Services/ Consultancy EAC/Innovation Hub City Tech Park	Computer Manufacture/ Analogue Devices/Integrated Circuits/Data Storage/	Software Development/ITC Services/Online Services Development		Hardware and Software Engineering and Development/Cloud Data Centres
Manufacturing/ Precision Engineering	City Tech Park/Innovation Hub	Electronics/ Optical Equipment	Stainless steel Engineering/Advanced Manufacturing/ R&D/Eng Design Services	Machinery/Valves Power Systems	Aerospace/Aviation, Electronics/Precision Engineering
Logistics	Port Related Logistics/Storage	Distribution/Supply Chain Management	Supply Chain Management/		Cold Chain Air Freight Cargo Centre SCM/Foynes Port/ Aviation Cluster/ Aircraft Leasing
Food and Drink	Bio-tech and Foods at Shannon (ABC)	Food Production/ Distribution		Food Production/ Distribution	
Pharmaceuticals/ Medical Tech	Shannon ABC	Medical Instrumentation/Orthopaedic Implants/ Medical Imaging, Patient Monitoring, and Home Healthcare	Healthcare/R&D/Med- Tech/ Optical Products/Endoscopic Products	Healthcare /Medical Filters	Pharma-Bio/ Pharmaceuticals/ Ophthalmics/ Orthopaedics/ Healthcare
	City Centre	Raheen /Dooradoyle	Castletroy/ Plassey	Newcastle West	Shannon
	New City Centre Locations /National Franchise Centre/Innovation Hub/Tech Park	Shared Services/Online Services	E-business/Online Services	HSE Employment Civil Service/Public Sector	Financial services/ Online Services/ Customer Support/Aviation, Aircraft Leasing
Visitor Economy/ Sport Leisure	Visitor Economy/Evening Economy		Sports Science/ R&D		Accommodation Services/Hospitality
Clean Energy/ Low Carbon	Environmental Services/Port Related Manufacture	Clean Tech and Renewables Manufacture	R&D, Environmental Services/Clean Tech/Consultancy	Clean Tech/ Renewables	Estuary Energy Cluster/ New Clean Tech Business
Media & Digital	New media/digital & Social Media	Telecoms/Games/Apps /Digital Security	Digital Media /Graphic Design		Graphic Design

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- 4.22 Outside the City a number of areas of the County also have critical contributions of their own to make to the development of the Region. Major advantages include the deep water harbour of the Shannon Estuary, combined with the climate and natural resource base of the County for agriculture, forestry and renewable energy.
- 4.23 In The Limerick County Development Plan (2010-2016) 329 hectares of available land were zoned for industrial or enterprise use in the County beyond the City environs. Since 2010, the amount of such land has increased by 29.56ha, as a number of Local Area Plans including Rathkeale, Cappamore, Kilfinane, Bruff and Caherconlish have been reviewed. This increase in enterprise and employment land provides greater choice for potential developers/investors. In addition to the conventional zoning of land for employment uses, the recently adopted local area plans make provision for mixed use urban development schemes which include provision for significant employment use.
- 4.24 It is important to highlight some key elements of what the County area beyond the City has to offer for economic development in terms of its natural and physical infrastructure. These elements are the Shannon Foynes Port deepwater facilities; and zoned lands in the important settlements and route corridors of Newcastle West, Rathkeale, Kilmallock, Abbeyfeale and Askeaton. The Mid West Area Strategic Plan (MWASP) 2011 proposes Newcastle West as one of the region's four 'development centres and engines of growth' in a third settlement tier below that of Ennis. It is envisaged that it can have a population of over 12,000 within the twenty year period of this Plan. Askeaton, Abbeyfeale, Adare and Kilmallock are planned as 'Rural Economic nodes' in a fourth settlement tier. Abbeyfeale and Rathkeale are, due to their size and position, to function in synergy with Newcastle West.

Shannon Foynes Port Deepwater Facility

- 4.25 The Shannon Estuary is Ireland's premier deepwater port area, with 6 main terminal facilities handling 22% of the national tonnage in 2011. It has deep draught berthage for large ships, routinely catering for ships of up to 200,000 dead weight tonnage (dwt). It has an International Airport, major roads and rail infrastructure. It is also of key importance in terms of its heritage, its potential for aquaculture, as a sustainable energy hub, and for tourism. In timely recognition of this key economic asset, all the local authorities on the Estuary, Shannon Development and the Shannon Foynes Port Company have commissioned consultants to prepare a strategic framework for land use and water based planning of the Estuary over the next 30 years called the Strategic Integrated Framework Plan for the Shannon Estuary (SIFP). This document is currently at draft stage. Simultaneously the Shannon Foynes Port Company (SFPC) has finalised a Masterplan called Vision 2041 for the sustainable development of the estuary as a port.

- 4.26 Foynes is the key port for handling general cargo in the Estuary, alongside Limerick City docklands. Four out of nine of the strategic sites identified for marine related or major industrial development around the Estuary in the Strategic Integrated Framework Plan for the Shannon Estuary (SIFP) are in Foynes or in the vicinity of Foynes. The development of Foynes is highlighted as one of the key strategic drivers of the Estuary in the Shannon Foynes Port Company's Masterplan. 127 hectares are identified as being required for marine related industrial use by 2041 in the Masterplan. 38 hectares of undeveloped land is already zoned for industrial use in the County Development Plan, which by itself would allow the area in established industrial use to expand by two thirds. Changes in land use zoning are required for the additional 89 hectares. Other proposals in the Masterplan are the provision of additional berthage in Foynes port itself and additional deep water berthage of 'Panamax' capability (ie capable of going through the Panama Canal, up to 80,000 tonnes dwt) in Foynes Island where there is extensive access to waters of a depth of between 12.5 metres and 20 metres.

Askeaton Business Park

- 4.27 Askeaton Business Park is one of the nine aforementioned strategic sites identified as being of importance for the development of the Shannon Estuary in the SIFP. It is 90.4 hectares in extent, undeveloped, and is owned by Shannon Development. It is fully serviced, has direct access onto the N69 national secondary road and Askeaton by-pass and is very close to the railway line between Foynes and Limerick. It is of strategic importance on account of its size and location which renders it suitable for a large industrial user requiring a bespoke plant, possibly in any one of the following emerging fields of Biopharma, Nutroceuticals, or Renewable Energy.

Newcastle West Zoned lands

- 4.28 Newcastle West is defined as a key settlement in the Core Strategy of the Limerick County Development Plan (2010-2016), and is the second largest settlement in the County after the City itself, with a population of 6,327 in the urban area recorded in the 2011 Census. It has 74 hectares of land zoned for business use, 23 hectares of which is developed, mostly for industrial, warehouse and enterprise use. Important businesses in the non-retail enterprise sector in Newcastle West include Ballygowan Spring Water Limited; Pallas Foods and Myson Heating Controls. Shannon Development have a Business Park, 8 hectares in extent, in Newcastle West, first established in 2000. 5.2 hectares of this park is still available for new development.

Kilmallock Zoned lands

- 4.29 Kilmallock is the second largest of the two key settlements in the Core Strategy of the County Development Plan, and the fourth largest settlement in the County after the City, with a population of 1,635 in the urban area recorded in the 2011 Census. There are 32 hectares of lands zoned for industry and enterprise in Kilmallock. 14 hectares of this is undeveloped. Shannon Development own 5.6 hectares of this in a section of the Kilmallock Business Park. This consists of nine serviced equal sized plots any of which is capable of accommodating units of up to 1,500 square metres floorspace.

Abbeyfeale Zoned lands

- 4.30 Abbeyfeale is the third largest settlement in the County, with a population of 2,007 people recorded in the 2011 Census. There are 35 hectares of lands zoned for industry and enterprise in the Abbeyfeale Local Area Plan. Kostal Electronics is the most important employer.

Rathkeale Zoned lands

- 4.31 Rathkeale is close to Kilmallock in size, with a population of 1,550 in the urban area according to the 2011 Census. There are 41 hectares of lands zoned for industry and enterprise in the Rathkeale Local Area Plan 2012 in three large sites, an increase of 73% on the amount zoned in the 2007 Local Area Plan. 28 hectares of this is undeveloped. The most significant developed areas are the Rathkeale Industrial Estate, which is fully developed, and the Allied Irish Beef Processing Plant (AIBP), which is currently operating on a stand-alone site.

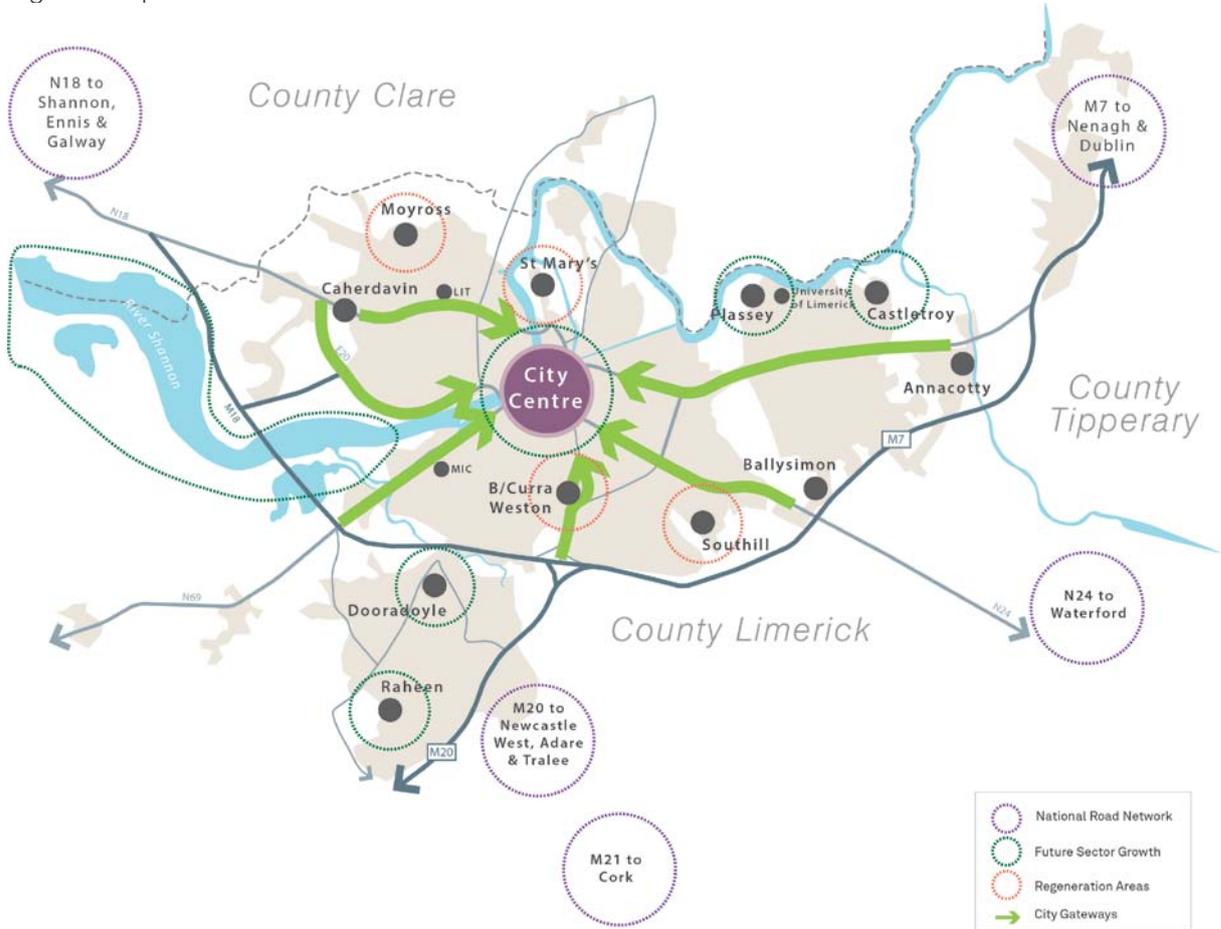
In Summary

- 4.32 A vibrant and growing economic Limerick City will have major uplifting economic impact on its County. The County can also develop its industrial capacity based on local resources and in a way that is complementary to the Metropolitan Area. One of the key resources is that of the Shannon Estuary, Ireland's premier deepwater port area. Its potential is given recognition in two strategic plans, the Strategic Integrated Framework Plan for the Shannon Estuary (SIFP), and Vision 2041 Masterplan for the Estuary as a deepwater port as commissioned by the Shannon Foynes Port Company.
- 4.33 More generally, the development of industry and enterprise in the county depends on infrastructural capacity, settlement size and strategic importance. A twenty year strategy for land use and transport in the Mid-West Region has been adopted by all constituent local authorities in 2011, the Mid West Area Strategic Plan. This will guide planning for industry and enterprise in the County, in a manner that supports and is in turn supported by a sustainable infrastructure and settlement hierarchy. So far as Limerick County is concerned, this proposes

that the town of Newcastle West is earmarked as a key town with Abbeyfeale and Rathkeale to be developed in tandem with it. Kilmallock, Adare, Askeaton and Abbeyfeale are designated as Rural Economic nodes.

4.34 The spatial distribution of these locations is illustrated in Figure 12.

Figure 12: Spatial Distribution



The Delivery Programmes

4.35 Three delivery programmes are advocated to deliver against these objectives as illustrated in Figure 13 below. Projects aimed at strengthening the knowledge economy and creating an outstanding business environment need to be underpinned by a set of interventions which create the conditions for long-term growth.

Figure 13: Creating the conditions for long term growth - Delivery Programmes



4.36 The economic benefits and outcomes of this Strategy are addressed in Section 8 of this document, with the ambition to create around 12,000 jobs – bringing Limerick up to the national employment rate.

4.37 Each Programme, the rationale and constituent projects are described as follows:

The Limerick Knowledge Economy - Programme [1]

<p>Project 1: The City Centre Higher Education Campus</p>
<p>Description & Purpose</p>
<p>This project is a major catalytic project which involves the creation of a new Higher Education facility in Limerick City Centre involving the University of Limerick, Limerick Institute of Technology and Mary Immaculate College. The project, in its fullest form, would involve a joint teaching facility, associated administration and support facilities and associated student accommodation. The project is still at the early conceptual discussion stage between partners but there is broad consensus in principle on the benefits of the project which underpins the Knowledge Economy and City Centre aspirations of this Strategy.</p> <p>The project is intended to help galvanise efforts to regenerate the City Centre bringing much needed investment, footfall and a critical mass of population, business activity and footfall.</p>
<p>Rationale and Sector Focus</p>
<p>Universities can be a powerful catalyst for social and economic change and in recent years this is being realised more and more often through the use of universities as drivers of regeneration. A traditional characteristic of universities and higher education institutions as centres of academic aloof or hidden away from civic society has now been superseded by a new generation of urban universities.</p> <p>Increasingly, students and higher education staff are placing more value on the quality and diversity of their wider living environment rather than focusing on the immediate academic facilities. Furthermore, students are demanding universities that are more connected socially and physically, not just to the surrounding urban area but to national and international locations. The growth in international student populations and students' desire to travel and have a more worldly higher education experience is also driving the demand for greater connectivity.</p> <p>In response to this, the anti-urban bias traditionally held by higher education institutions is being reversed. It is no longer the intention for teaching, research, accommodation and ancillary social activities to be concentrated in self-contained campus environments. Attracting the best academics and the best students requires the provision of a quality higher education offer embedded in a high quality urban living environment offering a range of social and economic opportunities. The project would have a broad humanities focus.</p>
<p>Higher Education and City interdependence</p>
<p>Ultimately, higher education institutions and their surroundings are more interdependent than ever but this is a symbiotic relationship, improving the host city environment can make significant strides to improving a university's reputation in the global education market. It can also increase a university's income as they increasingly rely on conferences and ancillary activities to generate revenue. Such activities require a higher education institution to provide the necessary facilities but to be successful they need to be supplemented with quality surroundings that include venues to eat, drink and sleep.</p> <p>A higher education institution's location can help to improve the City Centre and build the desired environment through developing high quality City Centre buildings and through strategically locating student accommodation in City Centre regeneration areas. The strategic location of key higher education assets impacts on footfall trends and can revitalise quiet parts of Cities, it is also the most sustainable option as it builds on existing transport and social infrastructure.</p>

<p>Higher Education Regeneration Priorities</p> <p>UL, LIT and MIC are in a unique position to enjoy the best of both campus and City worlds. The University of Limerick already has a high quality campus that provides a prime environment for academia and research, whilst the City Centre provides a potentially quality backdrop for more creative and business friendly activities. LIT and MIC already have a presence in the City Centre or adjacent to it and are further developing their Masterplans. Research suggests there are six facets that a good quality higher education environment should aspire to:</p> <ol style="list-style-type: none"> 1. Bring people and ideas together – Universities need to be designed in such a way that they break down barriers between different disciplines and faculties and encourage collaborative working. The physical higher education landscape also needs to facilitate the easy transition of commercially viable research into spin-out businesses that can fulfil their growth potential. Encouraging greater links between universities and the City increases students interaction with the community and this is an important facilitator of knowledge transfer between the higher education institutions and the wider City. 2. Create places, not just facilities – People want to live and work in places that are pleasant and can provide for both their social and work requirements. Providing a range of well linked facilities both in the higher education institutions and in the City can create an urban environment that is greater than the sum of its parts. 3. Balance flexibility and control – Security is vital to generating a sense of personal well-being and for protecting institutional investments. For higher education - led regeneration to succeed it needs to generate both a lively atmosphere and a safe environment. In addition to a safe environment and in order to maximise impact and investment return, higher education buildings should also provide flexibility such as student accommodation that can double as a hotel or lecture theatres that can be used as conference centres. 4. Promote relations between town and gown – A civic higher education institution with a strong presence in the central life of a City can give the institution an enormously influential role. Promoting this relationship can be achieved through sharing facilities with business and other organisations, opening access to the wider community and improving environmental quality through strong design and build principles. 5. Actively promote sustainability – A City Centre is inherently sustainable in terms of existing travel planning and infrastructure. There are also more advanced opportunities such as combined heat and power as well as indirect benefits such as the economic lift to the City economy. Therefore, the action of simply locating in the City can be a solid grounding for a highly sustainable development. 6. Prioritise people over parking – In embracing the sustainability opportunities provided by the City Centre locations, new facilities should not provide significant parking that breaks-up and disjoints the physical landscape. Instead, there should be a density to the built environment that encourages the 'triple helix' exchange between education, civil society and business.
<p>Lead Partners</p> <p>Limerick City and County Councils, University of Limerick, Limerick Institute of Technology, Mary Immaculate College</p>
<p>Capital Cost €30-40m for teaching facility assuming 500-1000 student capacity, including accommodation as part of development</p>

Project 2: Driving Demand for Knowledge
Description & Purpose
<p>A comprehensive programme of academic placement and (sector-specific) awareness raising activities designed to increase long-term and productive links between Limerick's higher education institutions and the Limerick business base. This would include undergraduate placements, post graduates and PhD Students and also long-term link-ups with academics on company boards etc. This project would build on existing placement schemes but would have a specific Limerick City focus.</p> <p>The project is designed to raise awareness and stimulate demand from within Limerick's business base of UL and LIT knowledge assets, specialist capabilities and sector specific research institutes, ultimately leading to improved innovation and business performance.</p>
Rationale and Sector Focus
<p>Despite having strong higher education institutions many Cities cannot capture the knowledge benefits of these assets due to lack of awareness and consequently there is little local demand from companies. Research highlights that those companies who participate in placement with students and academics continue to do so over the long-term and furthermore extend their engagement with universities utilising research capabilities and incubation/prototyping and innovation facilities.</p> <p>This programme would augment the existing placement activities which already occur but would focus particularly on Limerick's high tech sectors: ICT, Logistics, Life Science, Advanced Manufacturing, Digital Media. The aim is to do this on a much more comprehensive scale than the traditional demand led approach, to generate new demand and embed the UL and LIT research strengths in the City and Regional economy to drive genuine competitive advantage. Build upon the UL Nexus Centre and the LIT Hartnett Centre for Incubation and Innovation.</p>
Lead Partners
UL/LIT/Limerick City and County Councils Economic Development and Planning Directorate
Cost €200K per annum

Project 3: The Limerick Smart Investment Programme (SVC Fund)
Description & Purpose
<p>This project aims to increase access to Venture Capital for start-up and early-stage high-tech businesses wishing to establish or expand in Limerick or the Mid-West Region. It builds upon the LIT 'seed fund' project. The mechanism for this project already exists at a national level via the Enterprise Ireland Seed and Venture Capital Programme whereby EI partners with 9 Private Sector Seed and Venture Capital Funds (all located in Dublin) to increase availability of finance to SME's in Ireland. Under the 2007-2012 SVC Programme, EI has invested over €133million in Irish companies over this period. The Mid-West regional take-up however is extremely low (4% of total investment). The purpose of this project is to create a step-change in the availability of SVC for start-up, and early stage businesses in Limerick including those emerging through the existing start-up programmes and incubator facilities at LIT and UL.</p> <p>Rather than propose an entirely new fund at a regional level which would be too risky, certainly at this stage, to attract private SVC funds it is proposed that an</p>

<p>additional €50 million fund be earmarked specifically for the Mid-West over 5 years. This should be channelled through the existing national SVC Programme mechanism utilising the experience and market presence of the existing SVC funds and EI in partnership but actively managed by the private sector. This additional fund should then be actively promoted through a physical presence desk/portal in the Innovation Hub or located in the new Economic Development and Planning Directorate.</p>
<p>Rationale and Sector Focus</p> <p>Securing finance in the early years is extremely challenging, when the focus is R&D and there is often little or no revenue coming in. This means that many ideas are failing before they have an opportunity to be commercialised. This is referred to as the 'valley of death' or 'equity gap'.</p> <p>Banks are routinely unable to support innovation because of how they assess risk. As such, they are often unable to provide loans to the highly innovative SMEs. Through an economic cycle, equity is a more stable form of finance for SMEs than bank loans. For instance, SMEs can take a dividend holiday, but cannot stop paying interest on bank loans.</p> <p>Places such as Cambridge Boston and Silicon Valley can cite the development of their own Venture Capital Trust (VCT) base as a fundamental part of establishing a robust and sustainable cluster. Venture capitalists use both their experience and their contacts to reduce many of the information and opportunity costs associated with new business formation. The importance of contact networks and information to both making deals and investment monitoring explains much of why venture capitalists cluster tightly together. The availability of venture capital also attracts entrepreneurs and high quality people to a Region creating a virtuous circle of new enterprise formation, innovation, and economic development.</p> <p>Limerick creates many exciting new business propositions and there is already some Venture Capital available such as Irish Technology Partners linking up with LIT.</p>
<p>Lead Partners</p> <p>Enterprise Ireland, Private Sector SVC Funds</p>
<p>Cost €50m Fund</p>

<p>Project 4: Limerick Technology and Innovation Hub</p>
<p>Description</p> <p>A high quality facility in a visible City Centre location the Innovation Hub would provide 3-5,000 sqm of business and innovation space. The facility is intended to provide high quality business space available on flexible all inclusive leases, with shared services, common networking and 'interaction space' for knowledge firms. The facility will also house an outreach/commercialisation office linked to UL and LIT and also ideally be co-located with the new Economic Development and Planning Directorate, the Single Business Portal, the Start-up Fund and the SVC Office. The facility would also contain training areas, conference facilities and exhibition space. The Innovation Hub is intended to be a focal point for the knowledge economy in a high quality City Centre setting, bringing numerous strands of the economic and City Centre regeneration plans together.</p> <p>There have also been discussion with partners regarding housing a Fashion Incubator within the Innovation Hub, this would further reinforce the principle of a multi-sector, diverse and vibrant location.</p>

<p>Rationale and Sector Focus</p> <p>The concept is around flexible space based on precedents elsewhere in Ireland, Europe and the U.S. The Innovation Hub is to provide space for high potential start-up businesses but will also cater for the next stage in a continuum of innovation and start-up space for companies moving on from an incubator environment from within this facility or from the Hartnett and Nexus Centres. It will provide companies with access to a range of business expertise and support through the Limerick Single Business Portal. For start-ups the support is about accelerating the route to market, raising finance and reducing risk. For established companies support will include the full range of business support including access to VC, export advice, marketing, innovation and academic placements, access to UL and LIT facilities, workforce development, design and branding.</p> <p>A key objective of the Innovation Hub apart from long-term employment and productivity growth, is to create a critical mass of high tech and knowledge based firms in the City Centre driving demand for other services. The Innovation Hub would host a series of investor events on a rolling programme, where investor ready companies can pitch to qualified investors in a confidential and supportive environment. The focus will be broad but include high tech companies in ICT, Digital Media, Telecoms, Medi-Tech, Tourism and also Technical and Professional Services.</p>
<p>Lead Partners</p> <p>City and County Councils, UL/LIT/EI/Private Sector</p>
<p>Capital Cost €10-15m (or on lease terms to be agreed)</p>

<p>Project 5: The City Knowledge & Technology Park</p>
<p>Description</p> <p>An urban Technology and Knowledge Park Site (size to be defined) – options include ‘Cleeves’ Site, Hyde Road South of Colbert Station or Docks. Comprising high quality business space for high-tech companies and office space.</p>
<p>Rationale and Sector Focus</p> <p>This is a longer-term opportunity responding to a requirement for a well connected urban knowledge or technology park for occupiers and sectors that need a larger footprint but who would benefit from a highly accessible City Centre location offering close proximity to other knowledge businesses, support services and the amenity, cultural and evening economy offer of the City Centre. The City Knowledge and Technology Park is intended, over the longer term, to provide follow-on space for companies starting out in the City’s incubation facilities and the Innovation Hub in addition to providing an excellent proposition to inward investors.</p> <p>Targeting sectors such as ICT, Semi-Conductors, High Tech Manufacturing, Medi-Tech, Clean-Tech and Professional and Technical Services this project will represent a major driver of knowledge employment.</p>
<p>Lead Partners</p> <p>Limerick City and County Councils, Private Sector</p>
<p>Capital Cost: €25-30m</p>

Project 6: Limerick Medical Village (Medi-Village)

Description:
A range of medical related uses situated in the King's Island area of the City clustered around the existing Barringtons Private Hospital. This will involve specialist hospital treatment, out-patient services, medical research facilities, and a public health research specialism. Medical staff and patient accommodation would be located on site.
Rationale and Sector Focus
This project builds on the already successful private medical facility located in the City, and looks to extend the offer to include a wider range of specialist treatments and out-patient services. The uniqueness of the medical village concept lies in the availability of both a range of sector specific knowledge and research functions and a variety of related consumer amenities, including the pharmacy, medical library, internet stations, child day-care, deli/coffee shops, healthy-lifestyle bookshop, fitness centre and other related conveniences.
The project would represent a huge addition to the City Centre knowledge mix, reinforcing the University Facility, and the Innovation Hub. In addition the creation of staff accommodation and out-patient facilities will bring more visitor spend and footfall to the City Centre increasing demand for City Centre services, cultural amenities and the evening economy. The project will have a strong Life Science, Healthcare and Public Health Sector focus.
Lead Partners
Private Sector, Limerick City and County Councils, UL, LIT
Cost €15-20m (estimate)

Limerick Outstanding Business Environment – Programme [2]

Project 1: A Vibrant City Centre Employment Cluster
Description
The City Centre redevelopment is not just an economic project but also a physical regeneration project. Focusing on the economic angle, the project is about creating a critical mass of new employment in the City Centre in a new high quality knowledge based environment. The aim is to create a concentration of business, legal and financial services alongside creative and digital and social media. This would be supported by the consolidation of public sector employment uses alongside higher education, the Innovation Hub and the Medi-Village.
Rationale and Sector Focus
The knowledge economy demands proximity and interaction and thrives in high quality and lively urban environments. In particular, Business, Legal and Financial Services and the Creative and Digital Industries place a premium on being able to interact with customers, competitors and collaborators in related businesses. A lively, populated and animated City Centre creates an attractive location for employment in these sectors. Furthermore in successful City Centres the business and the City Centre 'consumption offer' (retail, food & drink, the evening economy and leisure) become mutually reinforcing.
In Limerick there is an opportunity to create a City Centre Employment Cluster comprising related business sectors for which a City Centre environment would be advantageous. This would include the business and creative businesses outlined above. The development of such a business cluster would certainly benefit from a small number of catalytic moves to drive up demand for City Centre space and create additional critical mass. Our opportunity would be to create a higher

education facility or joint UL/LIT teaching facility in a prominent City Centre location (see Programme 1, Project 1). The economic impact of such a facility could be enhanced through the co-location of associated administrative functions and employment and by locating student accommodation in the City Centre.

Other similar moves worth consideration would include creating a concentration of public sector employment in the City Centre to drive up demand for business, shops and other services and create additional footfall. This might include consolidating local authority and other government departments in the City Centre.

A real opportunity exists to provide new large-scale, quality office accommodation for public and private sector uses on the Opera Site in the City Centre. The development of the Opera Site provides the potential to have many hundreds of people working on this site over the next 10 years, thereby creating a vibrant City Centre employment cluster and a positive draw for other private sector investment. The private sector must lead and act as the catalyst.

Lead Partners

Limerick City and County Councils, Private Sector, UL and LIT

Project 2: The €1m Start-Up Fund

Description

A €1m Start-Up Fund targeted at high-tech companies in Limerick's priority sectors to stimulate new company formation. The project is intended to complement existing seed-funding and enterprise support and would be administered by a multi-disciplinary panel making awards of up to €100k per company.

Rationale and Sector Focus

The project is intended to be a catalyst to lever in more investment, and would be offered in conjunction with co-funding workshops to with VC and Business Angels network etc. The project is in response to a stakeholder identified 'gap' in current provision for start-up funding and the need to 'back' the ideas coming out of the extensive enterprise support structures already available. There are numerous precedents of similar funds established elsewhere that could be used as a template in terms of structure and approach - these include the Tech City Enterprise Launch Pad.

Lead Partners

Limerick City and County Councils

Cost €1m

Project 3: High Growth Business Support Programmes

Description

A suite of high-growth business support programmes building upon Enterprise Ireland's high potential start-up fund, targeted at start-up companies with the potential for high growth in Limerick accessed through the Limerick Single Business Portal. The project is designed to dovetail with other support but focuses exclusively on companies with high growth potential.

Rationale and Sector Focus

There is support from stakeholders and from within the business community to simplify

<p>and rationalise the general business support available and specifically that support targeted at High Potential Start-Ups. This project would bring the High Growth Start-Up offer together under one programme available through the Limerick Single Business Portal with a range of new programmes including the following:</p> <ul style="list-style-type: none"> – Opportunity Match with screened entrepreneurial team – Design on Demand Programme adding value through design – Expansion Planning with SME leadership teams – Support on marketing, workforce development, and assistance in exporting. –
Lead Partners
Limerick City and County Councils, Enterprise Ireland, Private Sector
Cost: Funded from within existing organisational budgets

Project 4: The Limerick Single Business Portal
Description
A single point of entry to all business support available from all agencies, whether local, regional or national, to companies in Limerick hosted by the Economic Development and Planning Directorate. The Portal would provide access to 'cradle to grave' support to companies of all sizes from micro to large companies. The Portal would be a single office located within the Limerick Economic Development & Planning Directorate and there would also be a Single Web Portal.
Rationale and Sector Focus
The rationale for this project is the strong consensus amongst consultees that the Economic Development and Planning Directorate in Limerick needs to play a more prominent role in aligning, co-ordinating and leading IDA and Enterprise Ireland programmes to make sure that they are maximising benefit to Limerick and addressing the key challenges on the ground, making best use of local knowledge and expertise. The Economic Development and Planning Directorate should collaborate with the IDA to ensure that the approach to FDI for Limerick is co-ordinated at the local level involving UL and LIT where appropriate.
Lead Partners
Limerick City and County Councils/IDA/EI/CLVEC
Cost: Funded from within existing organisational budgets

Creating the Conditions for Long-Term Growth – Programme [3]

Project 1: Best In Class Broadband (Quick Win)
Description
Provide 100mbps + speeds to all business and priority locations including the City Centre by 2015 and to all users by 2020. This is ultra fast broadband via <u>fibre to premises</u> and delivered through an open network attracting multiple Internet Service Providers.
Rationale and Sector Focus
The scene is set for a major shake-up of broadband provision nationally in Ireland.

<p>Following the release of "Delivering a Connected Society – A National Broadband Plan for Ireland", which is based on the Report of the Next Generation Broadband Taskforce - published in 2012, over €200 million has been pledged to be matched by private investment from service providers and other companies to deliver 70-100mbps to 50% of users in Ireland by 2020 (the fastest component of a three tier programme).</p> <p>In parallel, key wireline operators, namely former government-run incumbent Eircom and BT Ireland are ramping up their respective fiber-based broadband roll outs. Eircom has set an aggressive timeline to roll out both Fiber to the Cabinet (FTTC) and Fiber to the Premises (FTTP) to 1 million homes by 2015. BT Ireland has also reentered the country's broadband market, the UK-based company is planning to conduct a Fiber to Cabinet (FTTC) service trial in various Ireland markets with the aim of providing a VDSL-based 80 Mbps service for wholesale customers. Against this backdrop telecoms lobby groups such as Alto are advocating that local government should be "encouraged to play a more prominent role and to have the broadband strategy at the front of their minds" to ensure that plans are executed on the ground. This new Economic and Spatial Plan together with the local government re-organisation in Limerick would seem an excellent opportunity to become a first mover City for ultra-fast broadband in Ireland.</p> <p>For Limerick to realise the ambitions set out in the Economic Strategy of this Plan and to become a high-tech business location, super-fast or preferably ultra-fast broadband is an essential prerequisite. If the City is able to move quickly it could differentiate its competitive offer as a business location and gain some real advantage over other locations which are being up-graded as part of the national timetable of broadband upgrade.</p> <p>This project underpins both the knowledge economy programme where speed and bandwidth are fundamental to ICT Digital and knowledge based service companies. It also supports efforts to attract investment and creates a more competitive environment for start-up companies in all sectors. A wireless City Centre would also be a major attractor for business visitors, students and tourists alike.</p> <p>There has already been significant investment in digital infrastructure by both Limerick City Council and Shannon Development. This will be utilised and built upon as part of this project.</p>
<p>Lead Partners</p>
<p>Limerick City and County Councils/Internet Service Providers</p>
<p>Cost : €10m to €15m</p>

<p>Project 2: (Recommendation) Unified Government</p>
<p>Description</p>
<p>This is not a project in a conventional sense, more a new approach to City and County Governance characterised by confident and bold leadership driving an ambitious agenda for Limerick's economic growth with the support and consensus of local, regional and national stakeholders around the delivery of a clear set of tangible priorities.</p>
<p>Rationale and Sector Focus</p>
<p>Reconnecting the 'divided City'</p>

<p>Perhaps the biggest challenge facing the Limerick City and County Manager and the new Economic Development and Planning Directorate leadership is the task of bringing together the divergent priorities and ambitions of the various organisations and stakeholders that have an interest in Limerick’s economic performance. This will include National Government departments, National delivery agencies and regional and local organisations and politicians. At the current time there is no consensus as to the future. The new Limerick Authority must take the lead role in determining the shape and direction of the Limerick economy and where appropriate influence the regional economy, particularly in cases where economic clusters operate at the Mid-West level and where assets (e.g Shannon Airport) lie outside Limerick. This new structure will necessitate a change of culture and ‘mind-set’ within the existing organisations because it represents a fundamental change in the way things are done in Limerick. In effect, the new Directorate should be well resourced, pro-active and outward facing.</p> <p>Specifically, in supporting business, the new Directorate must be able to overcome issues of fragmentation, territorialism and spatial divergence that have dogged efforts in previous years to provide an efficient and effective service. The Limerick Single Business Portal is designed to support this change.</p> <p>In particular the Directorate should have:</p> <ul style="list-style-type: none"> – A long-term multi-sector focus able to align the property, skills and funding requirements of business across the City; – A dedicated City Centre team focussing on the growth and performance of the City Centre cluster; – A focus on stimulating new business in conjunction with LIT and UL; – A focus on better, faster broadband as a Quick Win project to support the knowledge economy; – A planning and policy role (pre planned zones etc) to enable delivery and the appropriate incentives to be developed; – A local enterprise office able to support micro enterprises; and – A marketing entity responsible for promoting Limerick.
<p>Lead Partners</p> <p>Limerick City and County Councils</p>

<p>Project: 3 (Recommendation) Review of Shannon Airport Role and Function</p>
<p>Description</p> <p>National Government recently announced that Shannon Airport is separating from the Dublin Airport Authority. The airport is critical to the economy of Limerick and a stronger airport is essential to building its economy. Together with national Government a joint strategy should be agreed which would include further testing of the findings of the All-Island Air Freight Study.</p>
<p>Rationale and Sector Focus</p> <p>There is a plethora of research highlighting the importance of international airports to City competitiveness and together with universities, airports are commonly regarded as the most important assets in differentiating competitive performance. In Limerick’s case there is strong stakeholder consensus that Shannon Airport does not provide the level of benefit that would usually be expected. In particular its role regarding FDI and the knowledge economy is felt to be constrained by lack of European routes. This is particularly true in the case when considering the potential to develop a Financial and Business Services Cluster and further strengthen the tourism offer. In addition the airport requires a staffing and operations review</p>

<p>alongside a comprehensive review of facilities if it is to remain competitive.</p> <p>If the economic impact of Shannon Airport is to be maximised consideration should be given to the recent air freight study draft recommendations for Shannon:</p> <ul style="list-style-type: none"> – securing US Cargo and FDA pre-clearance facilities for both Irish and European originating freight – develop a state-of-the-art cargo terminal including cold chain facilities such as those envisaged under the LYNXS CargoPort project proposal – Shannon Airport should endeavour to position itself as a European Hub for US-bound Life Sciences cargo <p>The economic benefits of these proposals are clear but viability needs further testing including consideration of other factors being implemented in parallel such as tax incentives.</p>
<p>Lead Partners</p> <p>Limerick City and Council Councils, New Shannon Airport Company, National Government.</p>

<p>Project: 4 (Recommendation) Employment Framework</p>
<p>Description</p> <p>A framework to maximise employment creation and economic mobility in Limerick. The framework would include broad strands: [1] measures targeted at residents of areas of persistent high unemployment particularly the areas covered by the Limerick Regeneration Framework Implementation Plan, and [2] measures focussing on improving skills of those who are in employment or who have undergone training but who are under threat of losing employment and wish to re-train or up-skill. The broad structure is set out below:</p> <p>Targeted at unemployed residents:</p> <ul style="list-style-type: none"> – A targeted basic skills programme – A public sector target employment programme; and – A City Centre construction and development employment project (see Project 5) – The public sector procurement project for construction is described in detail for Project 5. <p>For those in existing employment (workforce skills):</p> <ul style="list-style-type: none"> – An employer led sector-specific skills project-linked to Limerick’s growth sectors. This could be piloted in the first year for example in the established sectors of ICT, Food and Drink, and Tourism.
<p>Rationale and Sector Focus</p> <p>With the merger of Limerick City and County Vocational Educational Committees (VEC) to the new Education and Training Boards (ETB) (which will also take over responsibility for FÁS training centres) there is a timely opportunity to establish a new targeted employment framework overseen by the Economic Development and Planning Directorate with the ETB, further and adult education providers, and the private sector.</p> <p>The framework is employer lead and local agencies would work in partnership with participating employers (public and private) to identify, screen and train prospective candidates for training and employment opportunities from entry level</p>

to intermediate and technical level on an on-going basis. Existing training providers in the further education and adult education sector would deliver the bespoke packages. The framework would also utilise the 72 community learning centres currently operated by City of Limerick VEC to reach targeted participants of the programme. The framework would be sector specific, highly targeted, and proactive. No new building or organisations would be needed, the approach is to utilise existing learning infrastructure and departmental budgets.

Principles of the Employment Framework

[1] Integration: The employment and skills framework for Limerick must be fully integrated into the new skills infrastructure being developed with the arrival of the ETBs. A logical approach would be to ensure that key employers have a voice in this partnership and contribute to ensure that the principles of demand led, education, training and employment can be adopted at the Limerick level but also benefit from the wider sub-regional labour and skills pool. There are a number of key principles that would serve to strengthen Limerick as a knowledge employment location namely:

- Increasing the number of residents progressing into learning at advanced certificate and above.
- Increasing the numbers studying Science, Technology, Engineering, Mathematics and key future languages.
- Increasing the level of generic skills among young people and adults (such as effective communication, team-working and customer care).
- Increasing the proportion of employers in Limerick engaged in formal workforce development and leadership training.
- Increasing the number of young people staying in learning and achieving tertiary qualifications at 19 years old.

[2] Anticipation: Anticipating skills requirements is central to the framework. In the immediate short term level this will mean ensuring that employer's needs are met. At a more strategic level this will mean ensuring that key stakeholders anticipate the emerging and future skills requirements in Limerick companies in sectors such as Media, Digital and New Media, Gaming Technologies, Mobile Technologies, Advanced Manufacturing, Logistics, Professional Services, Retail, Sport and Tourism.

[3] Effective targeting of support: The opportunities for employment as the economy grows will be varied. This will inevitably include highly specialised knowledge-based employment but also and equally important a large number of medium and lower skilled level jobs across a range of sectors. The employment framework should look to target areas of persistent unemployment within the local area by using and funding established community organisations to identify, screen and help train (alongside the employer) prospective candidates. This will have the dual benefit of getting to the right people but also building capacity within the communities themselves.

[4] Collaboration: In order to be effective the employment framework must secure the buy-in of the the key employers across priority sectors as well as the key training providers – schools and colleges across Limerick and the wider area. This is achieved through effective integration as mentioned above but it is also important to develop relationships locally which can help in servicing labour market requirements as they arise on an on-going basis.

[5] Monitoring and intelligence: Continuous monitoring of skills requirements, sector foresight and skills forecasts should underpin this whole exercise. If it does not

happen already a Limerick level local labour market monitoring project should be set up which could have multiple benefits. It could inform all economic development and regeneration projects but would also help target skills development. Any monitoring should combine published labour market data with 'on-the ground' reports from a cross-sector sample of companies in Limerick.

Lead Partners

Limerick City and County Councils, the VEC, Training Providers, FÁS, Limerick Social Welfare Office, the community sector

Project: 5 Limerick Local Labour Agreement

Description

A Local Labour Agreement to ensure that Limerick is able to maximise the local employment impact of physical investment in Limerick's Regeneration. The project would be overseen by the Economic Development and Planning Directorate but would involve the Regeneration team and the private sector also.

Rationale and Sector Focus

Any increase in Regeneration related construction activity in Limerick City Centre offers a great opportunity to increase employment not just in the construction sector but also in the end-use of each development. However, extracting the maximum benefit from construction activity and ensuring that local people benefit from employment opportunities requires a coherent strategy to match local labour to new jobs.

A commonly used strategy to catalyse this mutually beneficial relationship is known as a Local Labour Agreements (LLAs). LLAs are now widely accepted and are common practice with many private developers and contractors. As well as aiding with the development in question LLAs help to establish a local workforce for future work. Additional benefits of increasing local employment often includes increased community goodwill towards development. Usually it is the role of the local authority or third party to identify suitable job seekers, provide them with the necessary training and skills and facilitate the relationship between job seekers and the construction firm. Broadly speaking Local Labour Agreements can be delivered under any of three methods:

1. **Developer directly employed by the Council** – by including clauses in build contracts with lead developers, to require them to sign up to an LLA and in some cases to set targets for recruitment and training for local people. These clauses can be cascaded down the chain to sub-contractors.
2. **Through the planning process** – linked to planning applications. After discussions with the developer, the Council would include in the planning permission a condition requiring an LLA to be signed and implemented.
3. **When any employers choose to sign up to an LLA**

Codes, contracts and voluntary agreements

LLAs need to be specific in their requirements of contractors. The use of codes and 'best endeavours' clauses leads to less clarity and less equality in the tendering process because each applicant will find it difficult to calculate the costs that they will incur to satisfy an ill-specified requirement. A likely response is that contractors will choose to not reduce their competitiveness by including LLA costs and, subsequently, will not deliver any LLA elements that will increase their costs.

A positive example comes from a voluntary code of practice used by a local authority in Scotland, which includes the following clause in the tender for each contract:

'The Council operate a Local Labour Agreement in which tenderers are requested to join and make a voluntary commitment to their code of practice.'

The specific requirements of the LLA are then provided to tendering contractors so that they can effectively cost for the delivery of construction services whilst adhering to the demands of the agreement. The LLA included:

Aim – 25% of construction jobs should go to local unemployed residents

Process – A Joblink Scheme to screen workers and provide operative training

Finance – Grants offered to contractors who employ Joblink participants; currently £40 per week for six months

Suppliers – Database of local companies contractors are asked to use where practical

Monitoring – Weekly labour returns requested

Conclusion – Contractors asked to commit to the code.

Labour supply and selection

Selecting job seeker participants for an LLA is a delicate process. It is not always desirable to focus on the most hard to reach groups in the local area as this can be problematic and result in construction companies not receiving the quantity or quality of recruits they desire. At the same time the LLA should not focus on those that would be able to find a job without the Agreement's existence as this reduces additionality.

Training

Provision of training through the LLA scheme is important for two main reasons:

- With increased on-site mechanisation and off-site pre-fabrication the number of unskilled jobs on construction sites is continuing to decline.
- Gaps in the construction labour market are generally for skilled workers.
- The impact on the beneficiary group will be much more comprehensive and long-term if training is provided increasing their chances of further employment.

Developing an LLA scheme for Limerick will involve the following:

Step 1: Identify demand both among the unemployed and among businesses.

Step 2: Bring together representatives from Limerick City and County Councils, the construction firms and investors to develop the aims, objectives, and the targets for the Local Labour Agreement

- Ensure that appropriate stakeholders are engaged in the discussion composing the LLA objectives.
- Ensure that the overall ambitions of the LLA are achievable.
- Define the role of the job matching agency – will it provide training, financial support, do outreach.

Step 3: Identify the appropriate agency(s) that will be the dual face of the Local Labour Agreement and liaise with both jobseekers and construction businesses in order to job match

- Ensure job-matching agency has sufficient resources to perform its role appropriately.
- Ensure that the agency understands the needs and demands of the construction firms it is supporting.
- Ensure that the agency understands the needs and abilities of the unemployed it is seeking to support into employment.

Step 4: Begin engaging construction firms to sign the LLA via one of the following:

- Voluntary agreement with individual construction firms.
- A clause in the tender process
- As a condition of a planning application

Lead Partners:

Limerick City and County Councils, Construction Firms, ETB, Community Sector

5. The City Centre Spatial Plan: Analysis

'A good city is like a good party, you stay much longer than you planned'. Jan Gehl

- 5.1 The second economic principle, established in the Economic Strategy to revive the economy of Limerick is to establish Limerick City Centre as the primary economic driver of the wider Limerick Urban Area, the County and the Mid-West Region. This Section and Section 6 establishes how this is to be achieved.
- 5.2 The success of any City Centre is determined by a complex interplay of physical, economic and social factors. This Spatial Plan builds upon the ambition and analysis in the Mid-west Area Strategic Plan 2012, the Limerick City Development Plan (2010-2016), the City Centre Public Realm Strategy and the City Centre Strategy (2008), although it advocates a change in direction where appropriate to do so, given wider economic ambition and the analysis informing the Economic Strategy for Limerick. It is informed by the City's special history, but recognises the requirement for a contemporary response, given current and anticipated economic and market conditions. The City Centre refers to the area of the city defined in the Limerick City Development Plan (2010-2016).

Spatial Analysis

Historical Development

- 5.3 Limerick exists because of the River Shannon. The City of Limerick is located at the head of the Shannon Estuary. The City was established originally as a Viking Settlement in the 9th Century, at a strategic crossing point on the River in the vicinity of the present Potato Market / Merchants Quay and developed into an important and much fought over military and trading centre.



River view of King's Island



Georges Quay

-
- 5.4 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 King's 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 King's Island framed by the River Shannon and its tributary, the Abbey River, whilst Irish Town was positioned on the South Bank of the Abbey River directly opposite. The towns were connected by a single bridge, giving a distinctive shape which lasted until the middle of the 18th Century.
- 5.5 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 in 1611, and the destruction and rebuilding of much of the fortifications during the civil wars of the 1640's and later during the Cromwellian Siege of 1651.
- 5.6 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.
- 5.7 The 18th Century in Ireland was a period of stability and considerable economic growth which was replicated in Limerick. The City benefited from strong and stable markets in Europe and North America. It became the marketing centre for the rich agricultural counties of Limerick and Tipperary as a consequence of its successful port, which allowed access to international markets.
- 5.8 It was at this point that Edmund Sexton Pery had a significant impact upon the City. Pery was responsible for a 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 them. The City walls began to be demolished from 1760 onwards. In keeping with Georgian era urban planning Pery put in place a grid plan for Newtown Pery which was partially implemented between 1769 and the 1850's. Limerick's main central City streets, Catherine, O'Connell, Henry, Lower Mallow and Roches Streets are key parts of this grid. The core area that makes up the 'Georgian Quarter' encompasses Barrington Street to Cecil Street and O'Connell Street to Pery Street. The built fabric created within this grid also followed a Georgian architectural aesthetic with consistent brick or stone streetwalls with a shallow setback from the back of the pavement; four and five storey facades above street-level with garden level building spaces below, raised entrances; repetitive approaches to the placement of larger, vertically oriented windows and flat roofs. By 1874 the plan had been set aside when the idea of a major Georgian Square at Pery Square was finally abandoned.
-

- 5.9 From 1854 the Irish famine ended the most significant period in the City's growth.
- 5.10 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 in the condition and extent of the Georgian legacy as people have left the City Centre and the impact of suburban shopping and residential development has been felt. However, it remains one of the defining characteristics of the central City.

Urban Structure

- 5.11 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.



Medieval Legacy



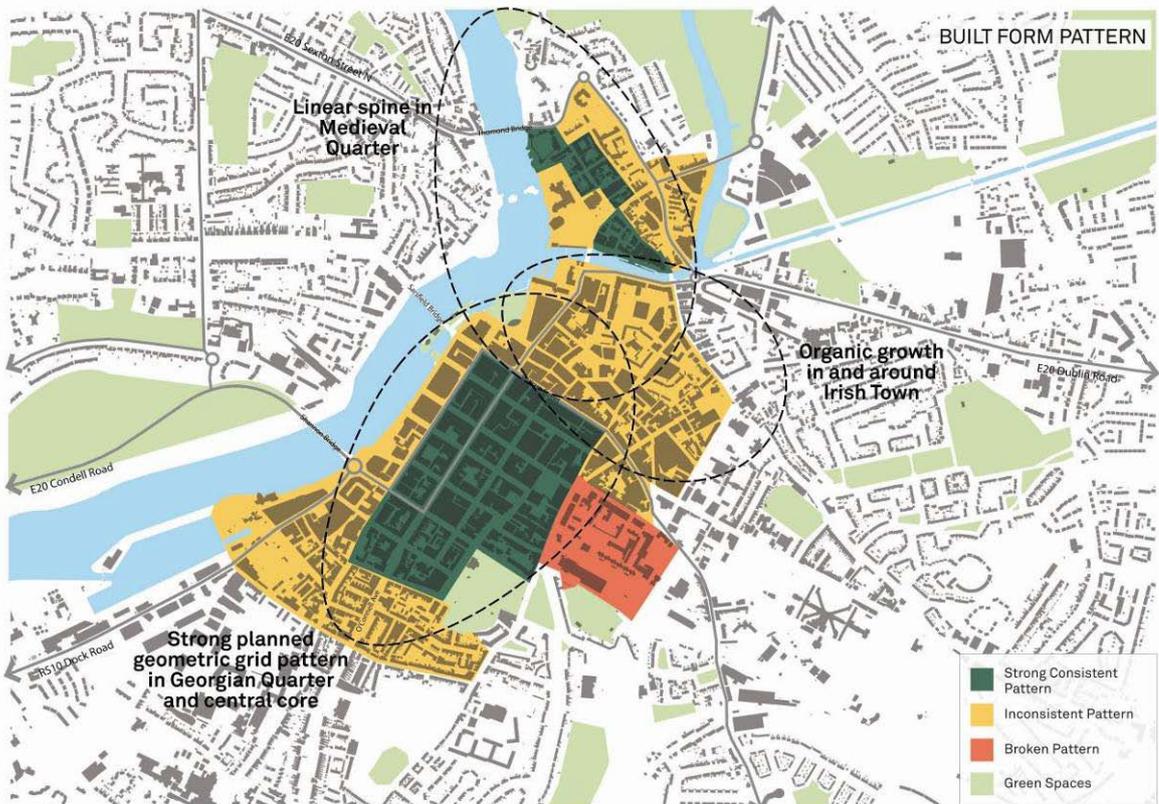
Georgian Legacy

- 5.12 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 Waterfront setting this makes for a city of special character.
- 5.13 Indeed the urban morphology of a street grid adjoining a more organic and chaotic Medieval street structure, with a strong Waterfront is practically unique. This uniqueness is not fully appreciated, nor taken full advantage of.
- 5.14 The urban structure has three areas of distinctive character:
- The Medieval Quarter – most evident at King's Island and incorporating King John's Castle and the Nicholas Street and Bishop Street neighbourhood. Nicholas Street provides a central spine for a fine grained neighbourhood grid. The quarter is also defined by Island Road to the east and the Waterfront on all sides to the west.
 - Irish Town – with an organic street layout 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 developed by Pery in the mid 18th Century prior to embarking upon 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 14: Built Form Pattern



Nicholas Street – King’s Island

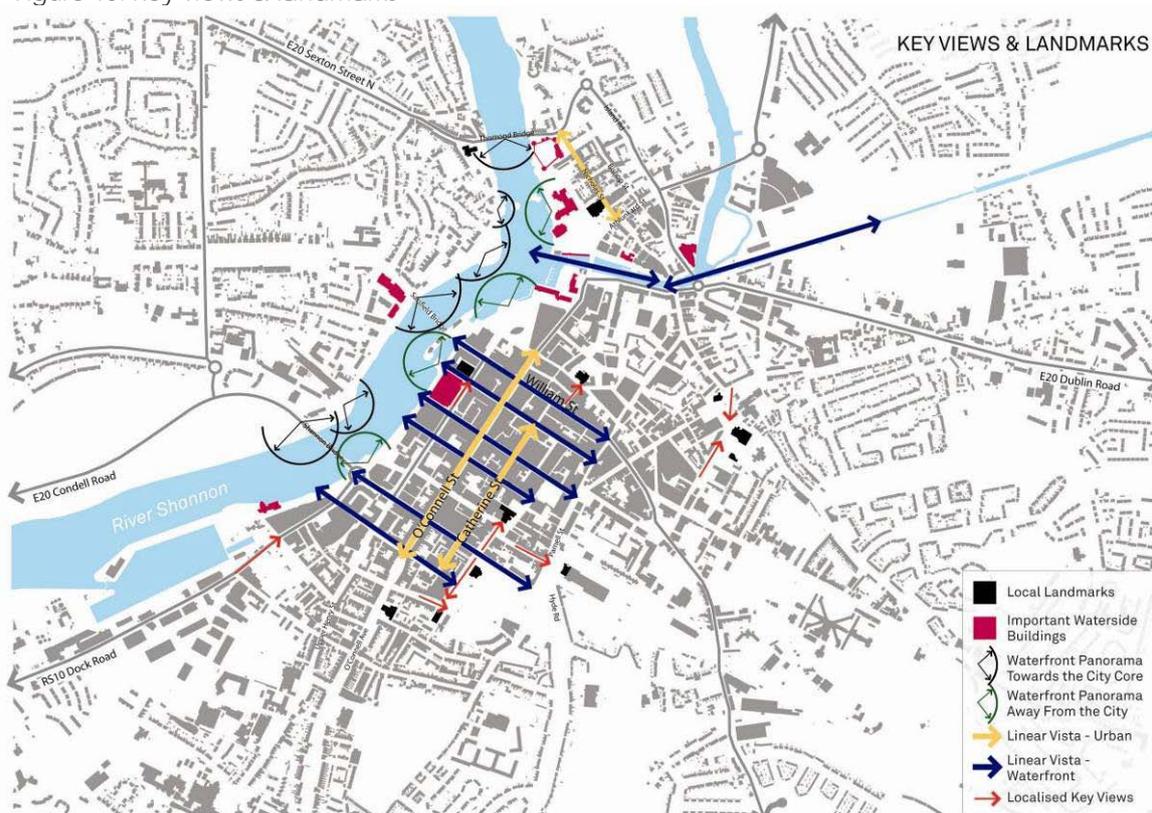


Alms Houses – King’s Island

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

- The City Centre does not fully engage the river, a legacy of the industrial and trading character of the Waterfront and more recent developments, and the introduction of elements of the orbital road system;
- The quality of 20th and 21st Century architecture has been disappointing in most cases, often out of scale and not respecting existing high quality urban form – especially along the river;
- The area north of Sarsfield Street, encompassing Arthur’s Quay, the Potato Market, the Courts and the Limerick City Council offices is now fragmented where the traditional structure has been removed;
- The historic fabric in Irish Town is difficult to navigate through and the overall fabric breaks down at the eastern edge;
- Major vacant sites – including the Opera Site and the former Dunnes Stores Site create large gaps in continuity and activity;

Figure 15: Key views & landmarks

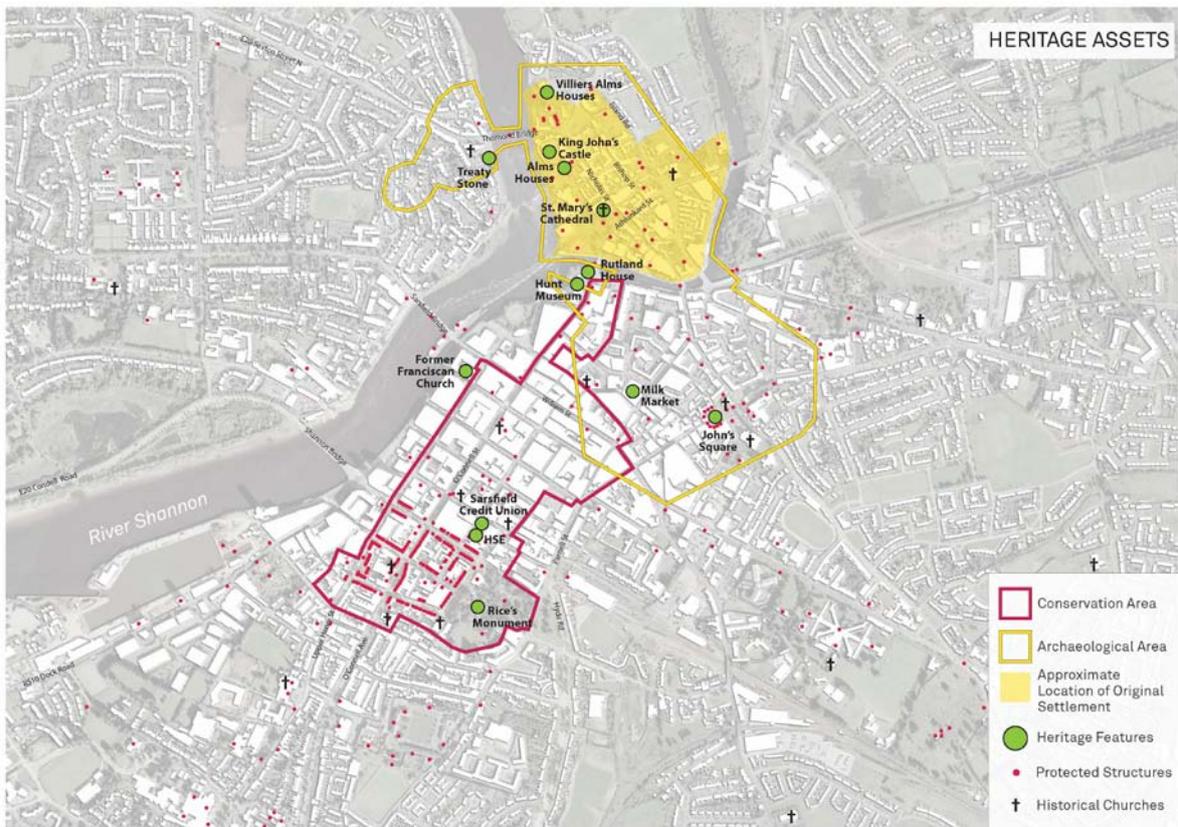


- The whole City Centre needs to be more strongly integrated, offering a more seamless transition for the pedestrian between places of interest and intensity; and
- Historic development has left a limited legacy of public squares and plazas.

5.16 In summary the City Centre has the following structural strengths and challenges.

Strengths	Challenges
<ul style="list-style-type: none"> 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 Limerick City Centre has a uniquely attractive Waterfront Key sites which can be utilised to transform the City Centre in public ownership 	<ul style="list-style-type: none"> 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 Waterfront 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 16: Heritage Assets





King John's Castle

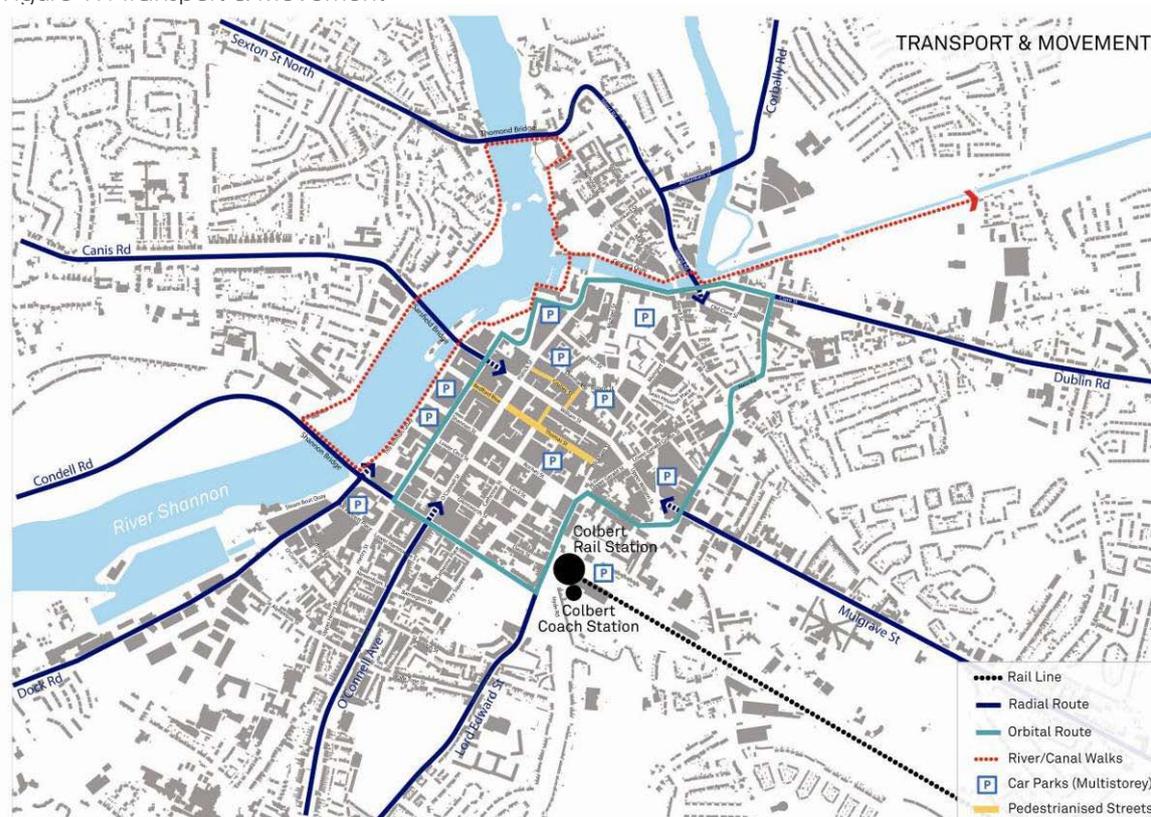


Franciscan Church, Henry Street

Accessibility/Connectivity/Legibility

- 5.17 In general terms Limerick City Centre is accessible – it is relatively close (20 minutes by car) to Shannon Airport, it has good, high quality motorway connections to Dublin and other cities and it has 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.
- 5.18 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 a need to rationalise traffic routes and to ‘put people before vehicles’.
- 5.19 Despite the Georgian legacy of a grid system of wide longitudinal streets and narrower cross streets intertwined by smaller alleys much of 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, the dominance of over-sized vehicular signage, a lack of orientating spaces, a number of inappropriate planning decisions and very poor pedestrian signage.
- 5.20 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. A balanced consideration is required 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 the City Centre has been extended the bigger issue is to make all the key City Centre streets more accommodating to the pedestrian.

Figure 17: Transport & Movement



- 5.21 The planned Orbital Route around the City Centre seeks to create to a mainly one-way clockwise traffic system. This proposal dates from before the completion of the Shannon Tunnel and has not been fully implemented. The time is right to reconsider it. 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.
- 5.22 One consequence of the existing movement strategy is that the Waterfront is isolated from the rest of the City Centre by Henry Street, and because of the free flow of cars, does not present a particularly appealing environment for either pedestrians or for the creation of Waterfront bar and restaurant activity.

Table 11: Accessibility/Connectivity/Legibility Analysis

Strengths	Challenges
<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • 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.



The Orbital Route



Henry Street – 4 lanes of one way traffic



Cars dominate O'Connell Street



Clutter signs, bollards, lights



Random Parking



One Way System Arthur's Quay

Public Realm and Open Space

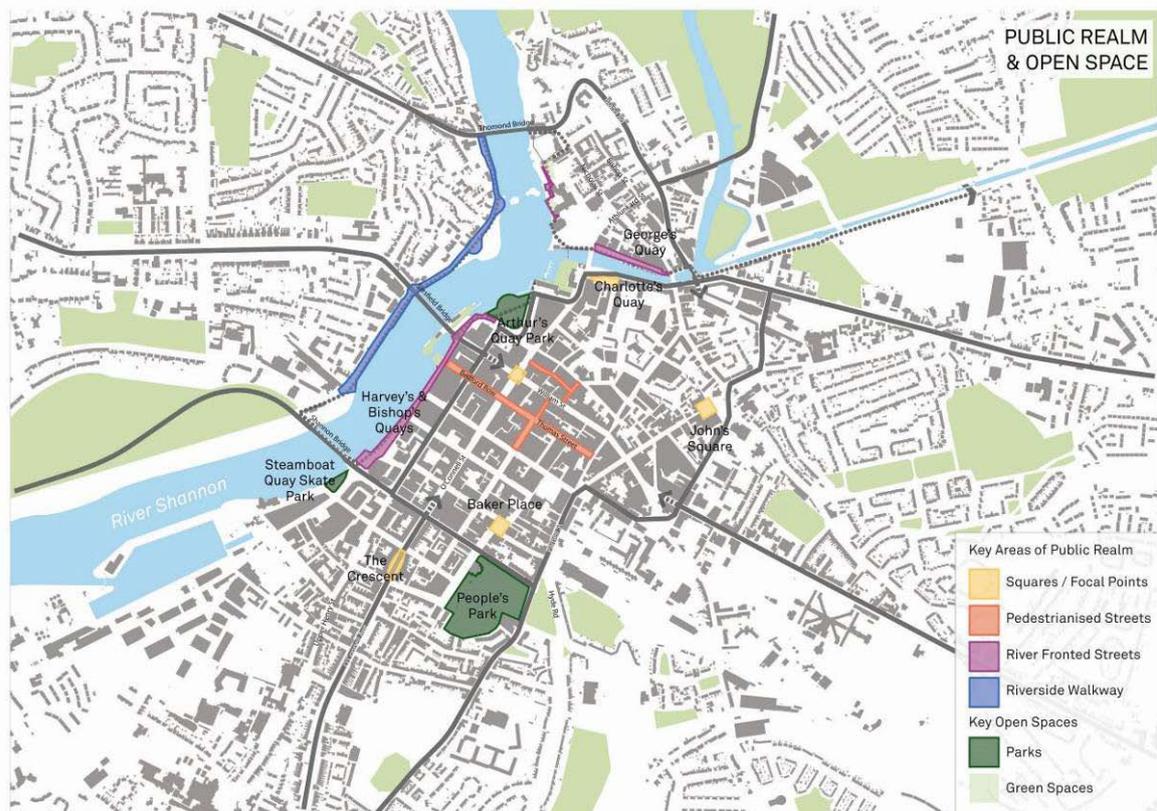
5.23 In recent years there has been a growing awareness across Europe of the importance of high quality public spaces in generating footfall and creating value. For Limerick to succeed in attracting trade back from the out-of-centre competing schemes it must offer a much better and more diverse streetscape, encouraging use over a longer part of the day. Improvements have been made in recent years through the partial implementation of the public realm strategy, but it is now time for a rethink of this strategy in tandem with a reconsideration of the City Centre transport strategy, and with wider proposals for business, retail, leisure and tourism renewal.

Table 12: Public Realm & Open Space Analysis

Strengths	Challenges
<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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

- | | |
|--|---|
| <ul style="list-style-type: none"> • People’s Park is a high quality urban park, with strong links to the Limerick City Gallery of Art and provides 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. | <ul style="list-style-type: none"> • 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 Waterfront 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 18: Public Realm & Open Space





People's Park



New Pedestrianisation Scheme



Riverwalk



Street clutter



Tourist Information Centre, Arthur's Quay



Range of Materials, Nicholas Street

Economic Function

5.24 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 Brown Thomas and Debenhams department stores and general stores – Dunnes Stores and Penneys, as well as the Tesco Supermarket at Arthur's Quay. Arthur's Quay is the only purpose built shopping centre. Cruises Street was redeveloped in the 1990's as a shopping street.

-
- 5.25 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 arranged 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.
- 5.26 The problems faced by the City's retailers are illustrated by the fact that there were a significant number of vacant retail units in the City Centre in July 2012.
- 5.27 Cafés and restaurants are found across the City Centre, although most are concentrated north of Cecil Street. The transition to Irish Town and the Milk Market area offers a concentration of restaurants, bars and night clubs which represent 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.
- 5.28 The largest central City office occupier is the public sector, at Limerick City Council offices north of the Courts; 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 primarily located on Henry and O'Connell Streets as well as in 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.
- 5.29 A new generation of hotels were also added to Limerick's central City stock in recent years. There is not an identifiable hotel quarter, but the larger hotels are close to the shopping core or close to the Waterfront.

Table 13: Economic Function Analysis

Strengths	Challenges
<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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 and retail 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’s image • There is a predominance of social housing in the City Centre and 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 from the City Centre economic mix and therefore limited student activity • Evening safety is perceived to be an issue in some locations



Dated Office Buildings



Shopping Core



The Granary Building Offices



New waterfront Commercial Development

Limerick – The Social Economy through Regeneration

- 5.30 The Regeneration process is a key driver of change across the City. Its contribution to the overall economic rejuvenation of the City is critical to sustained socio-economic vibrancy in Limerick. The commitment towards Regeneration has never been stronger and will play a very significant role in the economic, social and physical regeneration of the City in its entirety. Consistent with the transformational project approach prescribed for the City Centre, Limerick Regeneration is adopting a comparable strategy, leveraging off existing community assets, building capacity in the target areas and working towards a sustainable 'fit for purpose' programme of economic activity.
- 5.31 The economic development strategy for Regeneration Areas is focused on the delivery of a number of key objectives.
1. Ensuring the growth of local capacity through the provision of focused sectoral training and employment opportunities.
 2. Development of a stronger engagement platform to promote economic activity in the target areas between all stakeholder groups and local resources.

3. Ensuring the growth of local capacity through the provision of focused sectoral training and employment opportunities.
4. Creation of a programme of civic and economic interventions to attract, support and grow micro and community enterprise.
5. **Development** of niche economic activities that leverage off existing third level and regional enterprise expertise.
6. **Creation** of a series of hubs for a thematic economic development approach across all communities.
7. Contributing to the knowledge economy in key areas of community development through sustained evaluation and research e.g. community health.

5.32 The following represent a number of key projects designed to stimulate capacity building activity and local employment opportunities realising the long term objective of sustained economic development within areas of Regeneration.

1. Green Energy / Cooperative Recycling Hub - Location: Moyross

An integrated approach based on capacity building in the area of 'green energy vocational training' with the long term objective of attracting a cluster of Green Economy business to the area. A number of multi stakeholder approaches will be employed. These include the development of third level partnerships with LIT and UL in the area of green / environmental research in conjunction with the the Moyross Enterprise Centre. This would form a focal point for a cooperative approach among industry practitioners / experts (glass, fuel, metal, paper, etc.) and facilitate the development of a new industry base around the Moyross area and available surrounding lands. The organic cycle of capacity building, training and green business creation will result in an immediate involvement in the refurbishment and new build elements of the physical regeneration programme.

2. Horticulture / Landscaping - Location: Moyross / Ballinacurra Weston / Southill

The creation of a community garden and horticulture training centre will be developed to capitalise on successful existing smaller pilot projects. This will have the capacity to offer training opportunities in the area of horticulture for future incorporation in landscaping / estate management across the areas of Regeneration. Additional opportunities exist around the area of sports ground maintenance to incorporate into plans for local sports facility development.

The immediate use of available sites such as Delmege Park, Barrys Field and the Ballinacurra Westen Community Centre green field site can facilitate the development of large scale community gardens to facilitate this training. Further outputs include food production training (e.g. micro enterprise in artisan food production from the produce of the community garden).

3. National Social Innovation Hub - Location: Nicholas St.

It is proposed to create a National Social Innovation Hub to facilitate the development of social entrepreneurship and stimulate local enterprise development, create employment opportunities and act as a focal point for capacity building and job creation. The creation of a National Social Innovation Hub will represent the inaugural centre in Ireland and will be designed to attract the support and patronage of Multi National Companies (MNC) widely engaged in social innovation. Further scope will include a multi party third level element focusing on social entrepreneurship as a subset of the proposed City Centre Campus.

The hub will become the basis for social innovation within the immediate communities in addition to facilitating the development of socially focused projects in partnership with MNC's and third levels institutes e.g. ICT & Community Health, Social Research. The Hub will also require a form of micro finance as part of a regeneration civic intervention programme to assist start ups or employing personnel from the target areas. Further linkages with the Georgian creative hub can deliver additional cross City synergies using the Innovation Hub as an incubation centre for a range of enterprises directly or indirectly related to the arts and culture.

4. Strategic Use of Public Procurement

The programme of new build, rebuild and refurbishment will be subject to the adoption of social clauses to enhance the prospects of local employment and training during the physical regeneration process. The level of construction job losses within the target areas highlights a high level of tradespeople available for immediate engagement while the opportunity to provide training and apprenticeships will be considered in the final procurement delivery model as employed throughout the EU. Public procurement strategy for the regeneration process will consider socially responsible public procurement to include social clauses to employ local residents and consider provision of training and capacity building options. Further procurement considerations, which are commonly employed in the EU, include Green Public Procurement to link with the green industry hub and Public Procurement Promoting Innovation.

5. Attract Inward Investment - Expansion of Living City Initiative Tax Designation Areas

The announcement of the 'Living City Initiative' tax designation provides tax relief for residents who refurbish Georgian houses in designated areas. This pilot programme also provides tax relief for retailers who carry out works to upgrade or re-fit their shops in the designated Georgian Quarter of the City. A number of comparable tax designation areas will be sought to attract a mix of commercial and residential development in target areas under a thematic development approach.

6. Medical Village - Location: Georges Quay / Mary Street

The creation of the medical village at Georges Quay / Mary St. will provide immediate employment opportunities for residents of regeneration. Linkages with training organisations and availing of LIT's applied science capacity, will enable a focus on upskilling trades people to develop skills as technicians while non skilled labour job opportunities will also be created across all service and facilities management areas. The Village adjacent to the proposed National Social Innovation Hub will also facilitate further supply side activity. The creation of a tax designation and development of civic incentives to support the thematic approach of health and medicine will be explored.

7. CSR Engagement Centre - Location: City / National Social Innovation Hub

The Regeneration process offers an immediate platform for CSR engagement with local, regional and national businesses. The creation of a CSR Engagement Centre will proactively target businesses to engage with communities across the social and economic platforms of Regeneration. The output will result in enterprise talent available in the regional and national economy being provided with an opportunity to foster activity in areas of Regeneration with emphasis on capacity building and training opportunities.

The development a CSR hub profile will also be used to attract large international brands examining potential social and economic opportunities and will contribute to the marketing of Limerick as facilitating a unique community / private engagement platform.

8. Urban Orchard & Men's Shed Centre - Location: Southill

The delivery of an Urban Orchard offers a numbers of outputs in addition to a short term land use solution. The development and management of the site offers immediate training opportunities while the management of the produce will provide a platform for micro enterprise from artisan product manufacturing to local retail opportunities such as farmers' markets.

9. Vocational Sports – Location: Moyross / Southill

The success of sports related training programmes in areas of Regeneration will be capitalised upon with the fostering of relationships with leading professional sports organisations to develop a broader range of vocational sports programmes, capacity building and training. Engagement with Arsenal FC has already proven very successful and represents the starting point for developing further relationships with global brands and sports entities to develop sports as an enabler of youth engagement. Additional vocational sports opportunities will be explored through the development and management of new sports amenities.

Arts, Culture, Tourism

5.33 Arts and culture together represent a significant component of the success of City Centres. They contribute directly to the appeal of a City Centre for shoppers, employees and employers. They are a major component of the success of any tourism offer. Critically, Limerick has been designated as Ireland's first National City of Culture for 2014. King John's Castle on King's Island is currently being developed into a major tourist attraction with €6m being invested in the development of improved tourism facilities, including a new interpretative centre. The upgrade is expected to increase visitor numbers to 80,000 visitors per annum.

5.34 While there is a range of strategic issues for Limerick's arts and cultural institutions themselves, the focus here is on the contribution arts and culture can make to the Economic and Spatial Plan. Key City Centre arts and cultural institutions include:

- Limerick City Museum
- The Hunt Museum
- The Belltable Arts Centre
- Limerick Printmakers and Gallery
- The Frank McCourt Museum
- Limerick City Gallery of Art
- Limerick School of Art & Design (LSAD)
- King John's Castle

5.35 Limerick's higher education institutions also 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

5.36 Limerick’s stadiums also host large-scale concerts during summer periods. Indeed sport, in particular Munster Rugby is a major economic driver in the City, bringing significant business to the City on match days.

5.37 Limerick also has an active festival and special events programme, including:

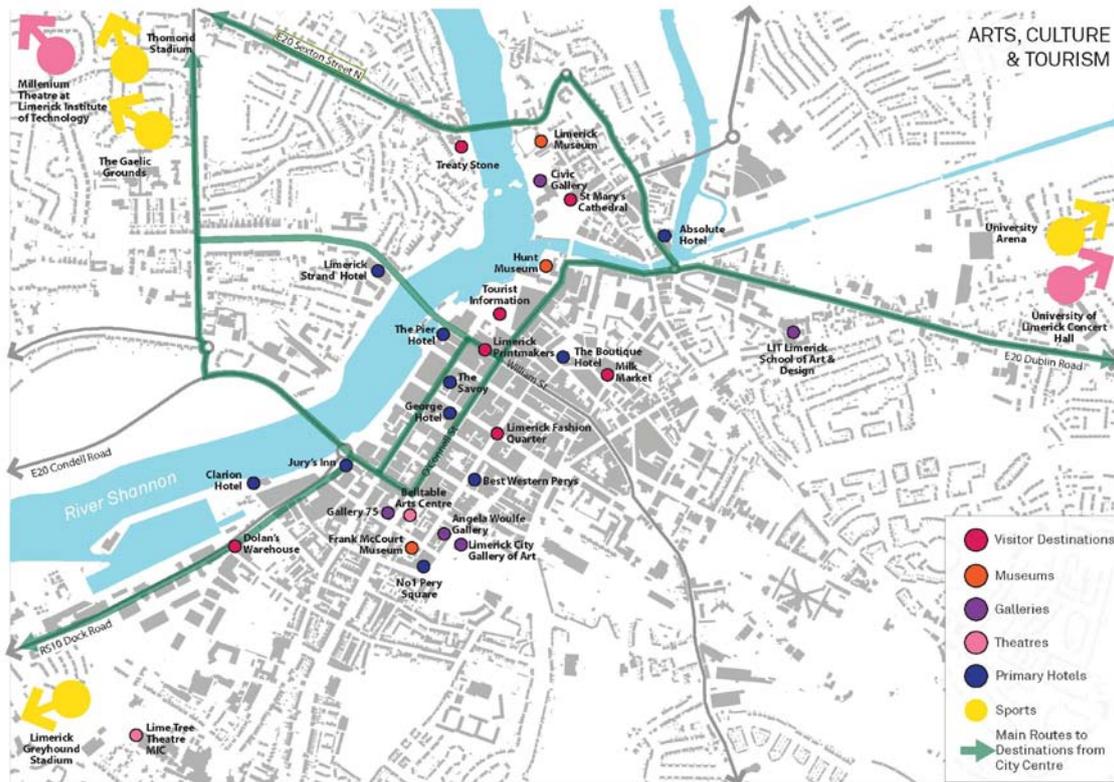
<ul style="list-style-type: none"> • The Kate O’Brien Weekend • Fresh Film Festival • St. Patrick’s Day Festival • Limerick Youth Fest • Féile Luimní • L.I.T. Film Festival • Eva International - exhibition of visual art • Riverfest 	<ul style="list-style-type: none"> • May Music in the Park • Culture 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
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5.38 Tourism is an important component of the economic and spatial plan for Limerick City Centre. At present there are about 380,000 overseas visitors to Limerick City and County each year. City visitors represent a significant proportion of this. However, this is considerably lower than the figure for Cork, Kerry, Clare and Galway counties (*Fáilte, Ireland, Overseas Visitors to Counties 2011*) representing an untapped market for the City. The Hunt Museum has about 45,000 visitors per annum. Limerick benefits from a good range and quality of hotels – a legacy of the tax incentive regime over the last two decades. However, occupancy levels are relatively low. In 2012, Limerick was last on the national list of city hotel room occupancy rates at 53%, compared with Cork which had the highest - 69% (*Savills*). Occupancy rates are reported to be improving. However, there is a need and opportunity to increase the number of tourists who stay over-night or take short weekend breaks. This requires enhancing the facilities and attractions for tourists and an improved, integrated tourism strategy that creates a multi-day offer for domestic and international visitors.

Table 14: Arts, Culture, Tourism Analysis

Strengths	Challenges
<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> There is not a visible resident arts community in the City Centre; There is not a 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 19: Arts, Culture & Tourism



A Vibrant Arts Community



Celebration



The Limerick City Gallery of Art



Hunt Museum

The Challenges and Opportunities

5.39 Overall Limerick City Centre faces many challenges – but none of these are unique in a post-industrial era. Many Cities have made, or are making a similar transition. All have done so on the back of a shared ‘Plan for the Future’ that has first realised the City’s problems and then pointed the way forward. Limerick needs the same. It is the dawn of a new era and the City Centre is critical to this future. Only a successful City Centre will deliver a prosperous Limerick and enable the economic potential identified by the Economic Strategy within the Plan to be delivered.



Make more of the River



Tackle the intrusion of the car



Activate the Quayside



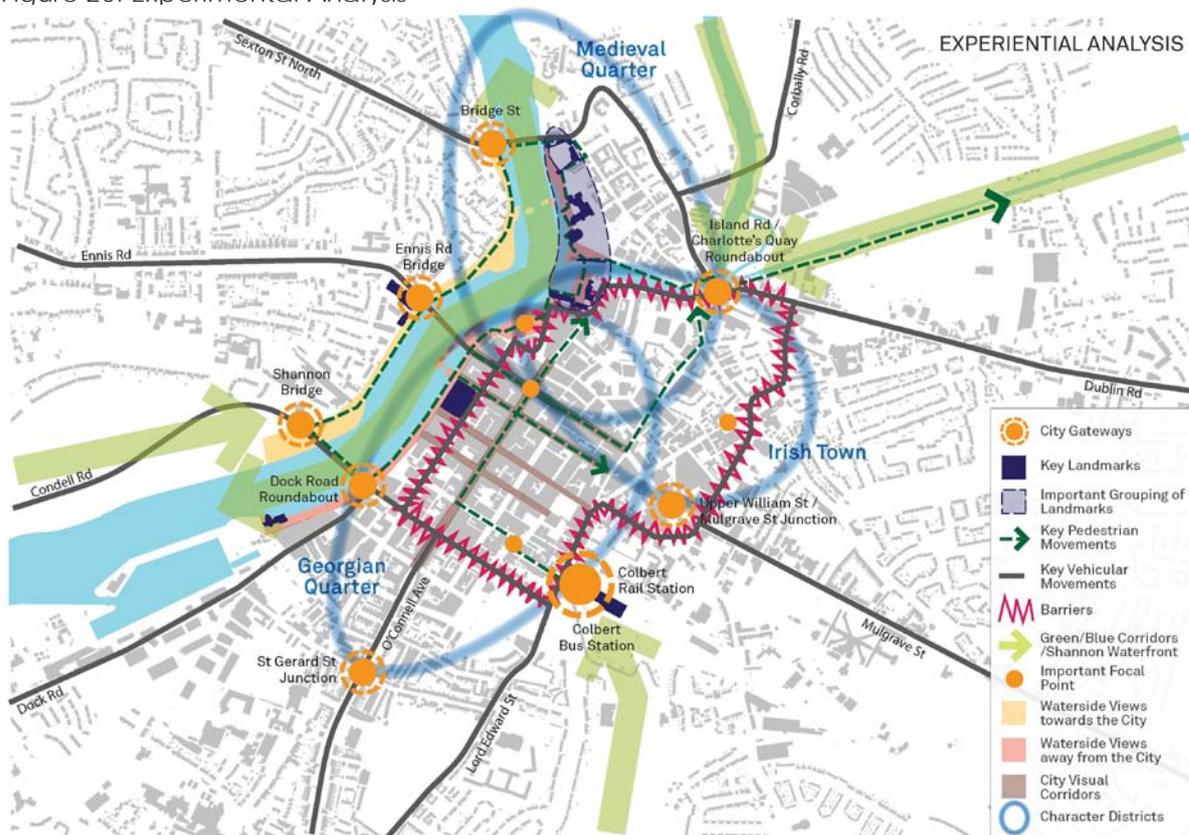
Remove clutter on streets

5.40 The positioning of Limerick City Centre at the heart of the Regional economy and giving it commensurate pre-eminence in policy and investment terms will be key to its success. This

requires consideration of the City Centre in a multi-faceted way – as a place for business activity, shopping and leisure, a focus for tourism and as a place to live and learn.

- 5.41 Regardless of expectations there is no ‘silver bullet’, no single initiative that will transform the City’s fortunes. Success will require clarity of vision, organisation and implementation and a series of integrated projects and initiatives that together make the difference.
- 5.42 Ambition should be high in terms of what needs to be achieved in the foreseeable economic climate, but not to be so ambitious as to make delivery impossible. The Spatial Plan seeks to build upon the inherent strengths and characteristics of the City Centre, its business community, the wider residential community and the strong, but understated arts and culture pedigree.
- 5.43 The Spatial Plan recognises the importance of making Limerick a City that competes on the European, and indeed World stage, as well as being a Regional Centre and Ireland’s third City. In looking forward, there are lessons that can be drawn from Limerick’s history – in particular the Georgian and Victorian eras. It was during these periods that much of the inherent quality of the City was delivered. It is essential that this quality becomes an inspiration and is not devalued by further inappropriate development.
- 5.44 The following plan draws together the principle issues to be taken into account in formulating a Spatial Plan for Limerick City Centre.

Figure 20: Experimental Analysis



6. The City Centre Spatial Plan: Strategy

- 6.1 To help formulate a multi-faceted Spatial Plan for Limerick City Centre that addresses the challenges and opportunities set out in chapter 5 and to deliver the ambition of the Economic Strategy, it is necessary to start by defining a series of objectives for the City Centre building upon those guiding the economic restructuring of the City as a whole. These are as follows:
- 6.2 **To establish a 21st Century City Centre economy capable of competing with other similar European Cities and leading the wider City, County and Mid-West Region and economy.** The City Centre must fulfill its full economic potential by creating a desirable place in which to do business. The City Centre must attract new inward business investment and encourage the formation of new local businesses by providing the type of high quality flexible space to meet the demands of business and ensuring the necessary business support structures are in place.
- 6.3 **To reposition the City Centre as the premier regional shopping destination.** The City Centre shopping offer must be improved dramatically, presenting a modern and high quality shopping offer commensurate with a leading European City. It must meet the requirements of a wide cross section of the community – local convenience shopping for local residents; high quality multiple comparison shopping for local residents and those traveling from across the region; specialist and niche products - including from the independent sector for the specialist shopper, facilities for visiting tourists, and overall a breadth and quality that appeals to businesses seeking to invest in the City.
- 6.4 **To establish a unique tourism offer that takes full advantage of the City Centre’s special heritage and environmental characteristics.** Limerick has facilities and attributes that would be the envy of many of its competitor Cities. However, it fails to capitalise upon this potential by not presenting a joined up, high quality offer for its visitors.
- 6.5 **To make the City Centre once again a desirable place to live by improving the quality of the housing offer in the City Centre.** This can only be achieved when other factors are addressed – most notably image issues, the overall environmental quality and by providing high quality developments of a scale and quality that can change perceptions.
- 6.6 **To create a high quality, safe urban environment attractive to investors, employers, residents and tourists which generates a sense of pride in the City.** A public realm strategy is in place within the City Centre and has been partially implemented. However, the City Centre still lacks a sense of cohesion, the quality of the environment remains distinctly varied and places of quality and key buildings are not appropriately recognized. The sense of arrival is

universally poor, the Waterfront is not appropriately celebrated and not connected to the rest of the City Centre; the car dominates the City Centre at the expense of pedestrians – a problem severely exacerbated by the one-way system; and there is a need for a signing strategy aimed at enabling pedestrians to navigate easily through the City Centre.

- 6.7 **To build upon the City Centre’s rich historic character by fully capturing this heritage, protecting and enhancing it where appropriate and complementing it with world class design for any new development.** Much of the City’s Georgian heritage which makes Limerick so distinctive remains intact, albeit in poor condition. However, with only very limited exceptions recent developments have eroded this quality through poor quality of design. This must be rectified.
- 6.8 **To create quality strategic gateways to the City Centre, thereby making it a welcome experience to visitors.** A strategic perspective is required to enhance the experience and the perception of visitors as soon as they approach the City Centre from all directions. This needs to address car users as they enter the city along the principal roads, people arriving at Shannon Airport and public transport users coming into Colbert rail and bus station.
- 6.9 **To attract and retain young people by providing learning opportunities in the heart of the City Centre through the co-operation of the University of Limerick, Limerick Institute of Technology and Mary Immaculate College in providing teaching and residential accommodation in the City Centre.** The most successful Cities have a City Centre higher education facility or cluster. Limerick has international quality 3rd level education institutions on the edge of, and outside the City Centre. This means that much of this potential is lost. City Centre facilities would go a considerable way towards redressing this balance.
- 6.10 In seeking to deliver against these principles the Spatial Planning exercise developed three broad options across the City Centre scaled against the level of intervention re-envisaged – minimum, intermediate and comprehensive. An appraisal process resulted in the recommendation of a preferred solution as set out in the following section.

City Centre Spatial Plan components

- 6.11 Over the next 15-17 years the City Centre Spatial Plan will deliver against these objectives. The renaissance of the City Centre requires the delivery of a series of inter-related interventions. The success of each intervention will depend upon the delivery of others. For example the desire to strengthen the City’s shopping offer will depend upon increasing economic development activity, the culture and leisure programme, improvements to the physical environment, an enhanced tourism offer, etc. Equally, an improved shopping offer is a pre-requisite to the successful attraction of new businesses, tourists, etc.

- 6.12 Whilst much can be achieved by improved organisation, partnership between public and private sectors and improved leadership, the renaissance of the City Centre will require a substantial investment in the built environment, the City's infrastructure and its public realm.
- 6.13 This programme is a direct response to the analysis, providing the fundamentals of a growth strategy over the next 15-17 years to establish Limerick as a leading European City known for its business, shopping, tourism, cultural and living opportunities.
- 6.14 As a start Limerick needs to get the fundamentals in place around business, shopping and living opportunities. It requires better infrastructure and public realm to make it a 'comfortable' and 'appealing' City Centre. However, to achieve its full potential it must embrace a series of **transformational projects or interventions**.
- 6.15 The Spatial Plan is then structured in line with this basic premise:
- **Seven transformational projects;**
 - **Enhancing the City Centre offer in retail;**
 - **A new business offer;**
 - **Expanding residential opportunity; and**
 - **Infrastructure/public realm investment.**
- 6.16 These are addressed in the following section.

Transformational Projects

- 6.17 Limerick benefits from a number of special physical assets and features that have great potential to 'catapult' the city forward, to differentiate the city nationally and internationally and to allow it to achieve its economic potential. It also has fundamental weaknesses which if addressed can have a transformational impact.
- 6.18 These transformational projects have been defined as:
1. **A 'World Class' Waterfront – A renaissance of Limerick's entire Waterfront;**
 2. **The 'Limerick Cultural Centre' – An iconic destination building on the Waterfront;**
 3. **'Great Streets' – a transformation of the City's three main streets – O'Connell Street, Catherine Street and Henry Street;**
 4. **A new City Square/Plaza – to define the focal point of the City Centre;**
 5. **A City Centre higher education campus - the creation of City Centre higher education campus combining facilities from Limerick Institute of Technology, University of Limerick and Mary Immaculate College in the heart of the City Centre (see Economic Strategy);**

6. Renewal of the Georgian Quarter – a concentrated programme to restore the Georgian part of the City to its former glory; and

7. Colbert Station renewal – a new public transport interchange and enhanced station environment.

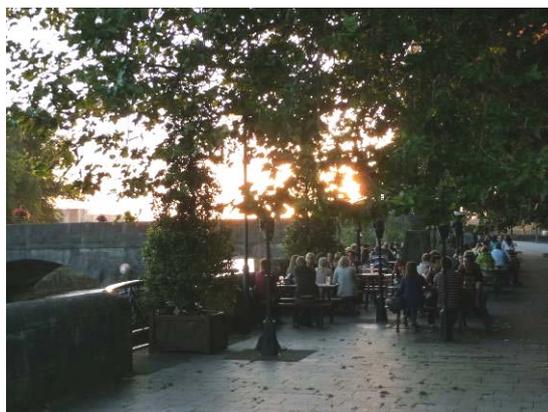
A World Class Waterfront

6.19 The Quays have long been neglected in Limerick – yet represent the City’s principal asset. The Plan advocates their re-invention as the main entertainment and leisure destination for the City – the ‘front garden’ for the City Centre where people can spend leisure time – either in the form of walking, enjoying the river views or more actively enjoying the bars, restaurants or the heritage attractions – linking to the Castle, Cathedral, the Hunt Museum, or a new Limerick Cultural Centre at Sarsfield Bridge.

6.20 The quayside experience would stretch from the Docks to the south along the central Quays to Merchants Quay, to the Castle and include Georges Quay, which already has a strong entertainment character. A new river boardwalk along Howley’s Quay is currently under construction and will enhance the environment. This will help extend the previous investment in the riverside improvements on the west side of the River, which should ultimately be extended along Merchants Quay to the Castle. Achieving the full potential of Limerick Quays requires through traffic to be restricted along the central Quays between Shannon Bridge and Sarsfield Bridge enabling greater pedestrianisation.



Pedestrian Friendly – access to the River



Entertainment and Viability



Interest through Public Art



The River as Limerick's 'Front Garden'

- 6.21 However, more needs to be done to entice active uses in the central Quays area. The redevelopment of the Bishop's Quay Site is important in that regard and leisure/entertainment uses should be a central component of a development brief for that site. A more pedestrian friendly environment along the Quays will also be important to achieve this.
- 6.22 To a limited extent Georges Quay shows potential. The redevelopment of the Opera Site should include the frontage to Bank Place and incorporate proposals to introduce bars/restaurants fronting onto the square generating activity on both sides of the Abbey River.
- 6.23 The proposals for the Arthur's Quay area advocated in this Plan will enable improvements to the park whilst the removal of Sarsfield House will open up access to the River at this point and enable stunning views up the River to the North. Overall this will facilitate a continued Waterfront 'park' along the River.
- 6.24 A refurbishment strategy is recommended for City Hall as the new headquarters of Limerick City and County Councils. This should include enabling access through the building for pedestrians moving from Merchants Quay / Potato Market to the Castle and in reverse.
- 6.25 The relocation of the Courts from their current location would significantly help in the proposals to enhance this area, enabling the area in front of the Old Custom House and City Hall to be converted to a new square, respecting the important heritage of this area. This would be an ideal location for a piece of commissioned public art to reflect the historical significance of this area of the City.

The 'Limerick Cultural Centre' - A New Destination/Iconic Cultural/Arts Facility

- 6.26 The designation of Limerick as the 2014 National City of Culture represents a special opportunity to establish a programme that fully captures the creative and cultural essence of Limerick and builds an impetus behind a cultural renaissance in the City. The longer term perspective should be to build a momentum behind a bid for the European Capital of

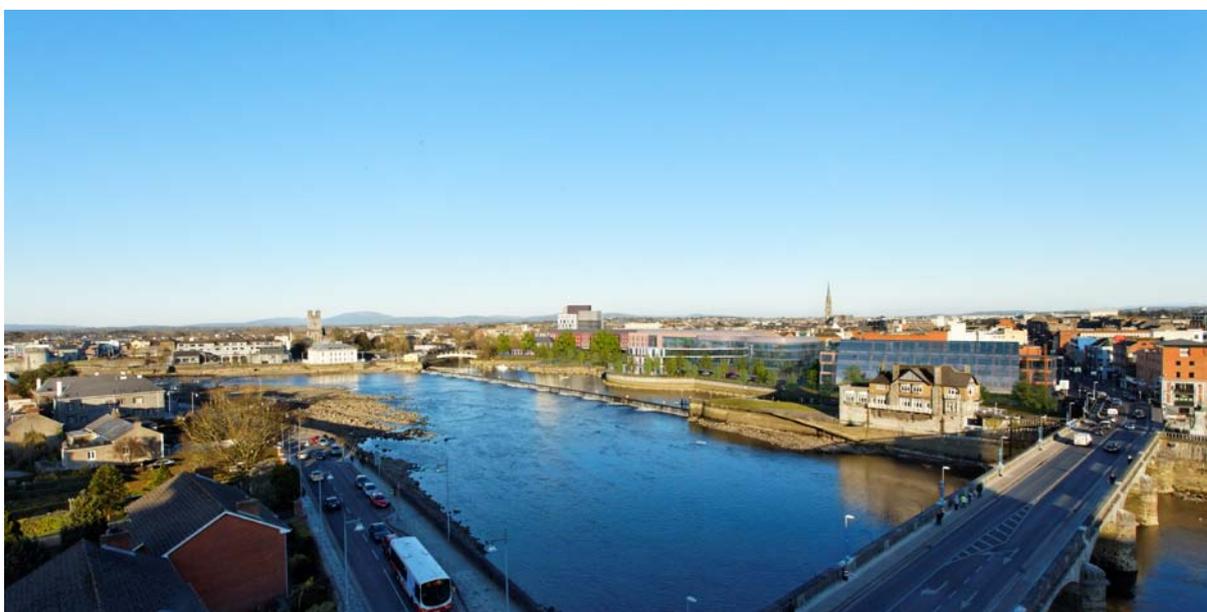
Culture in 2020. This also provides the opportunity to advance a new destination/cultural facility in the City Centre to act as a centrepiece for the city.



Iconic: Belfast



Iconic: Oslo



- 6.27 Such a facility would contribute to the aspiration to grow tourism in the City and to significantly increase the number of visitors to Limerick City Centre. The City needs an additional facility to encourage visitors to stay longer and to help entice people to stay overnight or take short breaks in Limerick.
- 6.28 The idea for 'the Limerick Cultural Centre' is to establish a – multi-use 'state of the art' visitor attraction. This could house the City museum or a museum of the West of Ireland, a National Diaspora Centre for which a number of cities are bidding, the City Library and a potential performance venue. It is appreciated that there are performance venues at the three academic institutions, but none of these are core City Centre venues and do not help the City Centre evening economy in the way that such a venue should.

- 6.29 The building must be 'iconic' in its design – a statement of the new Limerick. This warrants an international design competition.

Great Streets

- 6.30 Every great City has at least one 'great street' – Las Ramblas in Barcelona, Regent Street in London, Park Avenue in New York. Limerick has the central spine of O'Connell Street – flanked by Catherine Street and Henry Street. The aim is to deliver a transformational and distinctive programme of investment on these three important corridors. The nature of change and investment is different in each instance. But this is more than a public realm or infrastructure proposition – it is a proposal to reinforce the spine of the City Centre and connect its important assets. The overall aspiration is to:

- Enliven the streets with more pedestrian movement;
- Give pedestrian and cycle activity greater prominence;
- Bring key buildings back to life;
- Connect key elements – for example Colbert Station with the shopping core;
- Upgrade the public realm;
- Implement a unified sign system to assist pedestrian movement; and
- Expand the City's green infrastructure through the use of street trees.

- 6.31 O'Connell Street is Limerick's primary street and should be 'celebrated' and function in a manner appropriate to this status. This street is the central spine of the City – Limerick's 'Regent Street'. It requires a complete redesign to emphasise its importance and to address the balance of use strongly in favour of the pedestrian over the car.

- 6.32 The reworking of the City Centre traffic system, including the introduction of two-way traffic on Henry Street should remove as much traffic from O'Connell Street as possible. However, it is neither appropriate nor necessary to pedestrianise the entire length of the street. However, a solution that allows the creation of a new 'City Square' incorporating the street at Honan's Quay and Cruises Street should be tested.

- 6.33 A shared surface solution that gives predominance to the pedestrian is possibly the most appropriate solution. This is now accepted practice in many parts of the Europe, including the UK. Good examples are Exhibition Road in London and London Road in Brighton. A less extreme example is Kensington High Street in London which has seen the removal of clutter, wider pavements, central parking, etc. On-street parking could be removed from the street from Bank Place to Glentworth Street.



Limit street clutter



Prioritise pedestrians



Pedestrian friendly crossing



A single pedestrian signage system

- 6.34 O’Connell Street could be marked by two major spaces at either end – City Square and The Crescent.
- 6.35 O’Connell Street is flanked on either side by Catherine Street and Henry Street. Complementary improvements are required to these streets. Henry Street should be made two-way to ease traffic on O’Connell Street. Key developments at Bishop’s Quay and the Hanging Gardens on Henry Street should be completed. A complementary and appropriate pedestrian friendly signing scheme should be introduced. Catherine Street needs to be upgraded to strengthen pedestrian connections to the station with widened pavements, reduced and managed car parking, better lighting and junctions realigned in favour of pedestrians.

A New City Square

- 6.36 A new ‘City Square’ will be the centrepiece of Limerick City. A civic space – at the heart of a network of new and revitalised spaces and squares across the City Centre. The Square will be positioned at the focal point of the city – the heart of the city’s prime shopping area around Honan’s Quay and Cruises Street.



Appropriate scale and 'clean' design



Activating public space



Use of temporary structures



Fountain, seating, trees

- 6.37 This location is at the centre of a network of existing and new squares – from King’s Island, the Potato Market, Hunt Museum Gardens, Bank Place, a new public space at Arthur’s Quay, John’s Square, Baker Square, a new Colbert Station Plaza and The Crescent, O’Connell Street. It will be the place where celebrations are held, where events take place. It should be lively and animated, surrounded by shops, cafés and restaurants. It should include features that celebrate its status and function with public art and/or fountains. It must be a square where people congregate – meet, sit, rest and ‘watch the world go by’.
- 6.38 Detailed design will define the exact configuration, phasing and full integration into the redevelopment proposals for Arthur’s Quay Shopping Centre and for Cruises Street. The design should also connect into the Opera Site scheme, allowing pedestrian access to the centre of this scheme at the junction with Ellen Street. Another important design feature will be to enable ‘views’/ glimpses of the Castle and northwards along the River should Sarsfield House be removed. Ideally the Square should be totally pedestrianised, with service access at defined times. This would require a redesign of the existing road scheme, including a two-way Henry Street. Alternatively traffic movement could be controlled through the Square.

A City Centre Higher Education Campus

- 6.39 As defined in the Economic Strategy for the City, Limerick City Centre needs a greater higher education presence to help stimulate economic activity. Although Mary Immaculate College is already located on the edge of the City Centre, this Plan advocates and supports the moves being made to enable a significant presence from the University of Limerick in the City Centre, alongside supporting the strategy of Limerick Institute of Technology to establish a City Centre Campus.
- 6.40 The University of Limerick Strategic Plan 2011-2015 (Pioneering and Connected) confirmed the University's commitment to 'Deepening relationships between the University and the community and establishing (the University of Limerick) as a fulcrum in the life of the Greater Limerick Area'. The University has set the objective of 'extending the visible presence of the University in Limerick City beyond that already achieved by the Down Town Centre and the access campus'.



Integrating Higher Education at a city scale



Inviting the public into a central quad

- 6.41 Agreement must be reached on the location and sites for a greater higher education presence in Limerick City Centre. The most appropriate location would be in the Opera Site or, if longer term, in the area immediately to the east of the Granary Building – commonly referred to as Irish Town. There may be a need to accommodate a 'dispersed' model comprising facilities at a number of locations across the City Centre. A focus must be placed upon the University, Limerick Institute of Technology and Mary Immaculate to play their part in the redevelopment and revitalisation in the City Centre.

Figure 21: View of public realm and office uses at Arthur's Quay



- 6.42 In addition, there would be logic in considering the potential of locating the University of Limerick School of Architecture (SAUL) plus related design disciplines – including the Civil Engineering Department in a City Centre campus. This could encompass about 500 students.
- 6.43 Limerick Institute of Technology has announced its 'Campus 2030' Masterplan which advocates a three campus approach in Limerick to be called Thomond, Ormond and Desmond. The latter being a campus on the edge of the City Centre at Clare Street linked to the existing internationally renowned School of Art and Design. The Institute already has a presence at Georges Quay and is currently developing a Fashion Incubation facility on the Opera Site. The preference of the Plan would be for the Institute to consider an enhanced presence closer to the heart of the City Centre, on or in close proximity to the Opera Site. This is subject to further discussion, before firm decisions are made.
- 6.44 Aside from academic facilities there are two other areas where collaboration between the Higher Education Institutes is possible – the first is student residential accommodation, and, the second is the proposed innovation hub facility as defined in the Economic Strategy.
- 6.45 All three institutions have agreed in principle on the potential to collaborate on a City Centre student residential development. This could be in the region of 1000 units and be located on King's Island or east of the Granary Building in Irish Town.
- 6.46 Similarly the University of Limerick and Limerick Institute of Technology could collaborate on delivery and management of the Innovation Centre which would provide graduation space for businesses started and incubated at their respective facilities on their main campuses.

Renovation of the Georgian Quarter

- 6.47 The heritage value of the Georgian Quarter is well recognised. More than 500 buildings have been identified by the National Inventory of Architectural Heritage (NIAH) as being worthy of conservation. The Spatial Plan advocates the encouragement of a comprehensive refurbishment programme for this area. This furthers the approach of the City Centre Strategy devised in 2008.



Owner occupation



Mixed residential/commercial

- 6.48 A Georgian block should be identified for priority intervention to demonstrate potential. The City and County Councils should take the lead in facilitating delivery.
- 6.49 The aspiration will be to introduce owner occupation housing into the area. This would be a pre-requisite. Whole blocks should take on a residential focus, whilst other blocks would be more commercial in character. This will require a business consolidation programme.

Colbert Station Renewal

- 6.50 Colbert Station is an important gateway to the City Centre by rail and bus. This importance will grow as rail travel increases. It is also important due to the location of the main bus hub at the station and the location of the Station on the Orbital Route.
- 6.51 The Plan proposes a comprehensive regeneration scheme for the area to create an integrated transport interchange with linked/related commercial development including a refurbished station building, the potential for a new bus station on land to the north side of the Station and the removal of the car park at the front of the Station.



Sheffield Station



Piccadilly, Manchester

6.52 The area to the south of the Station is ripe for redevelopment/regeneration and has been identified as an opportunity area and is one of the options for an Urban Technology Park. This includes the sports ground, the properties fronting onto Hyde Road and the Hyde Road Roundabout. This area could also be a potential location for a new Science and Technology Park.

6.53 The Plan proposes a public realm improvement scheme for the front of the Station – across Parnell Street and along Davis Street.

Enhancing the City Centre Retail Offer

6.54 A central component of the Spatial Plan is to re-establish the City Centre at the top of the shopping hierarchy by improving the range and quality of shopping on offer, in the context of a much improved experience of visiting the City Centre as a whole. This also builds upon the ambition of the 2008 City Centre Strategy.



A new shopping street



Meeting the requirements of multiples



A new City Square flanked by shops



Appropriate scale, form and massing

- 6.55 This ambition can only be achieved by radically improving the shopping experience in the prime shopping area – in the vicinity of Brown Thomas, Debenhams / Penneys, Cruises Street and the Arthur’s Quay Shopping Centre. This is the Central City location that major multiple retailers would wish to locate in, and is the focal point of the shopping quarter of Limerick. It is not appropriate to seek to position multiples any significant distance from this zone. In this respect, most of the Opera Site is not in the prime shopping location, although shopping and leisure could be included at the southern end of the Site as a component of a business – led mixed use solution for this Site.
- 6.56 A focus therefore must be placed on the encouragement of the refurbishment of the Penneys / Debenhams block to enable expansion and enhancement of these two operators, in parallel to the comprehensive redevelopment of the Arthur’s Quay Shopping Centre area and subsequently the renovation / redevelopment of Cruises Street.
- 6.57 Arthur’s Quay and Cruises Street no longer provide suitable accommodation to meet the needs of national and international multiples. Both are in serious decline and are representative of a demise in Limerick’s shopping offer. Only direct and significant intervention will address this issue.
- 6.58 This restructuring will present the opportunity to address the implications of the changing retail market – a contemporary shopping offer with leisure – food, drink and entertainment at the heart of the experience, the adoption of widespread wi-fi technology and access to enable integrated internet and on-site shopping ‘show-rooming’, embrace the ‘click and collect’ concept, possibly including ‘collect only’ stores. These must all be regarded as exciting business opportunities – not threats – aligning with the concept elsewhere in the Plan of an enhanced broadband strategy for the City.
- 6.59 These concepts must also embrace the strong independent shopping experience in Limerick. It is the blend of multiple and independent shops that can make Limerick a special shopping experience within the Region and nationally.

6.60 Similarly the Milk Market has demonstrated the importance and power of the ‘informal’ outdoor market to Limerick. This should be captured fully and enhanced. The Milk Market must be nurtured to become a larger and more regular feature of the City Centre.



Existing Milk Market, refurbished recently



Potential for a street market

6.61 The concept of an open air/street market should be encouraged along the surrounding streets of Carr Street, Ellen Street and Robert Street – connecting to a redeveloped/renovated Arthur’s Quay and Cruises Street. A linear market along Cruises Street and Denmark Street would act as a link to attract footfall between the Milk Market and the City Centre.

6.62 There are many examples where this has happened to good effect – most notably in London, including Borough Market. This should be led by Limerick City and County Councils addressing any by-law issues, assisting with traffic management, promotion, etc.



Borough Market



Gabriel's Wharf

6.63 To complement the Market offer, King’s Island/Nicholas Street should be steered towards becoming a location for antique shops. There are signs of potential in this area and this should be further encouraged through a regular antique fair, promotion, etc.

A New Business Offer

6.64 The Economic Strategy of the Plan emphasises the key role the City Centre needs to play in ensuring that Limerick achieves its full economic potential, not only by ensuring an enhanced

shopping/leisure experience, but also by providing appropriate opportunities and accommodation for business activity.

6.65 The Spatial Plan reflects this potential by encouraging business uses in several locations across the City Centre. The Opera Site is a major opportunity site for new business activity – tying into the heart of the City’s shopping offer, building upon the presence of Sarsfield House and the Granary as a principal component of the mixed use solution for this Site. This plan envisages that a key component of this mix could be an ‘Innovation Hub’ closely aligned to the Higher Education facilities, providing graduation space for fledgling businesses as highlighted in the Economic Strategy.

6.66 The Opera Site should be developed as a business quarter with a mix of large-scale private and public sector office accommodation, higher education accommodation and supporting retail, leisure and civic/cultural uses.



A new business quarter – quality offices



A new business quarter – quality streets/spaces

6.67 Secondly, the revitalisation of the Georgian Quarter is intended to reinforce the cluster of important professional service businesses already located there, benefiting from good access to the railway station and ready access by car.

6.68 There is also potential to reinforce Henry Street and the Waterfront as a business location. This can be achieved by the redevelopment of the site at Bishop’s Quay for mixed use, complementing the ‘Hanging Garden’ Site directly opposite the Waterfront on Henry Street.



Bishop's Quay



'Hanging Garden' Scheme

- 6.69 The Economic Strategy within the Plan identifies the need for an 'Urban' Science and Technology Park as part of the wider offer. The suggested location for this is the former 'Cleeves' Site at the entrance to the Shannon Bridge on the north side of the River. Alternatives could be to the south of Colbert Station, or at the docks south of Steamboat Quay. Further detailed analysis is required to test the feasibility of delivery at these locations.
- 6.70 The Strategy also advocates the delivery of the Medical Village concept in the Georges Quay area, backing onto Mary Street and linked to the existing Barringtons Hospital. This could include treatment, research and teaching, with a special emphasis on urban public health issues and bring a number of institutions and private sectors activities together.

Expanded Residential Opportunity

- 6.71 The most significant area of opportunity for encouraging more City Centre living and a diversification to include main owner occupation in the City Centre is in the Georgian Quarter, through the refurbishment of the Georgian housing stock. A pilot scheme is required to identify the potential and to set an example for private sector investment.



Georgian



Irish Town



John's Square



King's Island

- 6.72 In addition, there are opportunities to undertake more housing on King's Island capitalising on the area's heritage and history, and the predominantly residential character of the area.
- 6.73 The other area with potential is in the Eastern Fringes, or in what was Irish Town, but only as part of a comprehensive long term regeneration strategy for that area.

Infrastructure / Public Realm Enhancement

- 6.74 A series of co-ordinated improvements are proposed for the City Centre's transport infrastructure and public realm. This dovetails with the transformational projects already identified.



Thomas Street



Bedford Row

- 6.75 Now is the appropriate time to re-assess the existing and proposed traffic system for the City Centre. The concept of the Orbital Route and related plans were instigated ahead of the completion of the Tunnel under the Shannon and thus before the beneficial impact of allowing traffic to by – pass the City Centre.
- 6.76 In rethinking the City Centre Movement Strategy the following objectives are to be considered:

- Putting the pedestrian first throughout the City Centre with wider pavements, wider crossing points, etc;

- Removing as much extraneous car traffic from the City Centre as possible;
- Reducing and strictly managing on-street parking;
- Removing one-way traffic where possible, but especially on Henry Street and Lower Mallow Street;
- Creating a new City Centre Square or Plaza at the redeveloped Arthur's Quay shopping centre and on Cruises Street;
- Reducing the traffic flows on O'Connell Street;
- Adopting the 'Smarter Travel' principles that have been formulated for the City Centre;
- Providing a new car park at Colbert Station; and
- Reducing the dominance of over-sized vehicular signs across the City.



Smarter Travel

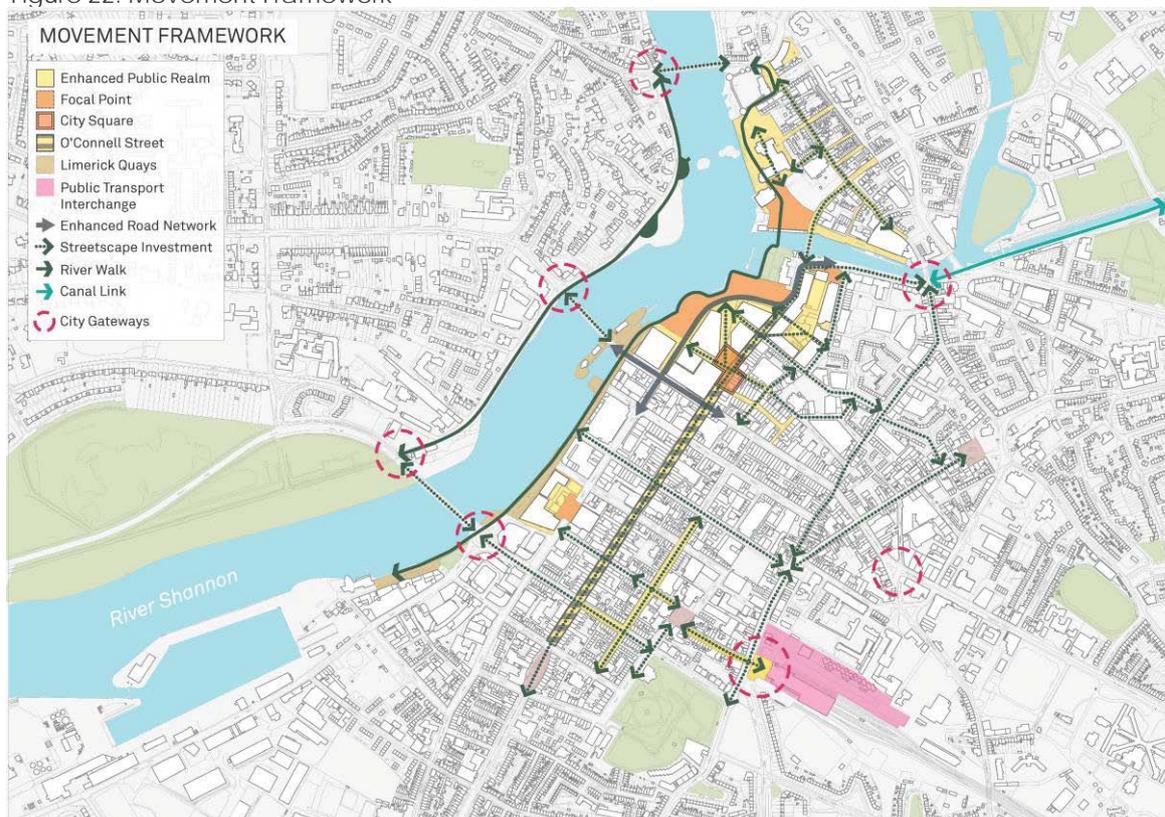


Parking

- 6.77 The Spatial Plan supports and embraces Limerick's Smarter Travel concept. Limerick has been designated one of three Smarter Travel Demonstration Projects in Ireland which seeks to reduce car trips in the City and increase walking and cycling. The principal infrastructure components are a canal cycle and pedestrian route, a public station transport interface with enhanced cycle facilities, appropriate traffic management measures in favour of the pedestrians and cyclists and the provision of cycle parking facilities across the City Centre.
- 6.78 This initiative also links to the wider public realm and signage strategy to assist permeability, pedestrian movement and way finding.
- 6.79 Within the City Centre it will be difficult to provide dedicated cycle paths, although they can be integrated into the design for O'Connell Street and also along the quays and riverside relatively easily and should be an integral part of the design.

- 6.80 Improved bus stand facilities are required – though these need to be carefully designed so as not to clutter, and to be in keeping with the character of the City Centre.
- 6.81 The Transport Strategy should include for the provision of a dedicated pedestrian, cycle and ideally dedicated bus link along the Canal between the University and the City Centre.

Figure 22: Movement Framework



- 6.82 A Public Realm Strategy for Limerick is in the process of being implemented across the City Centre. Improvements to Baker Place, Bedford Row, William Street (lower & upper), Thomas Street and Catherine Street have been implemented. In addition improvements have been implemented on the north side of the River. Further development is currently underway to implement an improvement strategy for the Quayside.
- 6.83 As part of this Plan we advocate a rethink of the Public Realm Strategy by extending it across the Abbey River to King's Island.
- 6.84 Elements of this Strategy have been touched upon elsewhere, however it comprises the following principal components:
- A network of public squares or plazas across the City Centre – connected and promoted as a collection. These are:
 - A new City Square on O'Connell Street;
 - A new Plaza at the Potato Market on King's Island;

- A new Square at Bank Place;
- An internal Square in the redeveloped Opera Site; and
- A new Plaza in front of Colbert Station.
- Better connections to John's Square, the Crescent and Baker Place;
- A new River walk along the Quayside as part of the Riverside Improvement Strategy;
- Enhancements to Davis Street, Glenworth Street, Catherine Street connecting the Station to the central shopping area;
- Enhanced connections to John's Square and in the vicinity of the Milk Market;
- Enhanced public realm in the vicinity of King John's Castle and along Nicholas Street; and
- Renovation of the Park Canal to allow it to fulfil its potential as a valuable waterside amenity and an important link between the City Centre and the University of Limerick.

6.85 In addition, there is a need to develop a standardised pedestrian and vehicular signing system, including interpretative signage, a standardised lighting system and a standardised bollard and seating system. A strategy is required to address car orientated street signs which currently clutter streets and obscure views.

City Centre Development Zones

6.86 The Plan also reflects on the implication of implementing these proposals zonally, with fully integrated approaches to development, public realm and movement across districts within the City Centre. These are set out as follows. The organisation is spatial rather than reflecting priorities between zones, with a vision, key proposals and outputs provided for each zone.

City Centre Zones

King’s Island

6.87 The proposals for King’s Island reflect its significance as the historically most important part of Limerick City Centre, bounded by the River Shannon and Park Canal. It is Medieval in origin and comprises two of the city’s most important historical assets – King John’s Castle and St Mary’s Cathedral. These two assets are joined by Nicholas Street and by the Waterfront. 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. There are well established residential communities in place. There are significant assets in place at King’s Island and an opportunity for it to play a stronger role in the life and economy of the Limerick’s City Centre.

Vision

6.88 *King’s Island will be seen as a definable City Centre District with more visitors, more employment, and new places to live and featuring a more accessible Waterfront and better public spaces to visit, and relax in. New investment will upgrade City Hall and complete the Riverwalk, while streetscape upgrades and new pedestrian signage will strengthen connections across the Canal and fully integrate King’s Island into the rest of the City Centre.*

Figure 23: Zone Plan



Key Components

The Forecourt

- Relocation of the local Courts away from King’s Island and renovation of the historic Circuit Courthouse to incorporate a new civic headquarters for the new Limerick City and County Councils;

- Interior and exterior renovation of the historic Circuit Court to reflect the prominence of this classic building on the Waterfront;
- Creation of a new high quality largely pedestrianised public space – plaza in front of the Court at Merchants Quay/Potato Market to create a setting reflecting the quality of these buildings. Most parking will be relocated from this area;
- Completion of the public Riverwalk around the Courts, the Potato Market would connect to the Waterfront at the Hunt Museum. This could include a new bridge;
- Upgrade of the streetscape from Patrick Street, north to the entrance to the forecourt.

Central Waterfront

- Renovation of City Hall, while still permitting pedestrian through access to the Centre;
- Creation of a new Waterfront open space as a setting for new development, a high quality frontage to the Shannon River and a new component of the Riverwalk;

King John's Castle

- Implementation of the new €6 million visitor entrance and facilities at King John's Castle;
- Completion of a new Riverwalk from Thomond Bridge, completing a Waterfront pedestrian connection from the Castle to the Hunt Museum and into the City Centre core;
- Addition of a new, high-quality residential development at Castle Street to complete the gateway to King's Island from Thomond Bridge;

Nicholas Street/Mary Street

- Encourage antique shops along Nicholas Street and in front of the Castle;
- Targeted infill development at vacant sites on Nicholas street;
- Upgrade of the restaurant and café offer for residents, workers and visitors;
- Create a new health and medical research cluster at the south end of Mary Street as a City Centre exemplar of Limerick's medical manufacturing and research sector;
- Upgrade of the streetscape from north to south to complete public realm investments around King John's Castle;
- Addition of new pedestrian signage to guide visitors to and through King's Island.

Adjacent Projects

- Improved Riverside pedestrian linkage to and from the City Centre by the possible removal of Sarsfield House;
- Streetscape upgrade at Charlotte's Quay and Bridge Street;

- Pedestrian and visitor signage from Patrick Street and the Hunt Museum;
- Upgrade and extend the Riverwalk from the Hunt Museum to the Potato Market

Figure 24: View from King’s Island across Shannon



Project Summary

Table 15: Project Summary

Kings Island	Project	Outcome	Uses	Site Area (sqm) / Linear (m)	Height / Storeys	Potential Floorspace (sqm)
Renovation	Local Court	Stronger Frontage	Civic Office	800	3	2,400
	City Hall	New Identity	Civic Office	1,650	5	8,250
	Circuit Court	Strengthened Vista	Court	1,100	3	3,300
Development	Nicholas Street Site	Stronger Frontage	Housing, Retail	200	3	600
	Castle Street Site	Stronger Gateway	Housing	1,200	3	3,600
	Medi Park Site	Full Use, New Frontage	Research, Treatment	4,000	3	12,000
Public Realm	Potato Market	Full Use, New Frontage	Public space	1,500		
	Courts Forecourt	New Civic Arrival	Public space	3,600		
	Enhanced Riverwalk	Stronger Riverfront	Riverwalk	2,500		
	Riverfront North	Stronger Riverfront	Riverwalk	6,000		
	Bridge Street	High Quality Street	Street	200		
	Nicholas Street	High Quality Street	Street	350		
	Local Streets	High Quality Street	Street	400		

Implementation

6.89 The following sets out expected delivery partners and the City Council role for key projects:

Table 16: Implementation

Kings Island	Project	Delivery Partners	City Role and Delivery Requirements
Renovation	Local Court City Hall Circuit Court	Courts Service City and County Council Courts Service	Planning Funding Planning
Development	Nicholas Street Site Castle Street Site Medi Park Site	Dev Partner Dev Partner Dev Partner	Planning Planning Planning
Public Realm	Potato Market Courts Forecourt Enhanced Riverwalk Riverfront North Bridge Street Nicholas Street Local Streets	City and County Councils City and County Councils	Design, Fundraising Design, Funding Design, Funding Design, Funding Design, Fundraising Design, Funding Design, Funding

The Opera Site

6.90 The Opera Site is a highly visible block on Patrick and Rutland Street, fronting onto Bank Place and Charlotte’s Quay and primarily owned by Limerick City Council. It is a critically important site at the heart of the City Centre, easily accessed from shopping locations on O’Connell Street and Arthur’s Quay, by visitors to the Hunt Museum, by office employees at Sarsfield House and by drivers passing through the City Centre. Although largely underused, especially behind the Patrick Street façade, the site includes a number of active uses, mainly ground floor retail and the Granary office building fronting onto Michael Street. There are a number of vacant ground and upper floor frontages on all sides, as well as obsolete service yards and sheds in the interior. This Site has been the subject of a number of redevelopment proposals. There is an urgent need to bring this key site back to full and productive use, making a major contribution to strengthening the City Centre.

Vision

6.91 *The Opera Site will be revived through a new, more intensive collection of activities focused on commercial, civic and public sector offices, an Innovation Hub, higher education facilities and supplementary retail/leisure uses. This is also an opportunity site for the location of higher education facilities components, with teaching, research and commercialisation facilities, should agreement be reached on this matter. Delivery cannot wait for this to be resolved. The potential exists to create active use at ground floor level. A new setting will include high quality pedestrian oriented streets, strengthened connections to and through Arthur’s Quay to the Waterfront and a new managed public space within the Site itself.*

Figure 25: Zone Plan



Key Components

- Partial redevelopment retaining the important buildings fronting onto Patrick Street and Rutland Street and the Granary Building;
- Buy-in (CPO if necessary) of the buildings fronting onto Bank Place to allow for a comprehensive development;
- A concentration of mixed uses will animate this Quarter, creating a destination within the City Centre and bringing footfall to surrounding streets, public spaces and shops;
- Potential for a new higher education campus around an internal square – subject to agreement (the alternative location for this is Irish Town to the east of the Granary);
- A new Innovation Hub – 10,000 sqm providing flexible small business space for businesses 'graduating' from incubation facilities at the UL and LIT.
- A major new office development opportunity, with a significant public sector occupier. This is an ideal location for a new public sector offices anchor. It could be approximately 10,000 sqm including the relocation of the Revenue Commissioners from Sarsfield House.
- A new pedestrian connection from Michael Street to Patrick Street should cross a new 'internal' public space that offers a quieter, interior courtyard space for occupiers and visitors;
- A new entrance on the corner of Ellen Street and Patrick Street, opposite Arthur's Quay will draw people into this Site;
- Rutland and Patrick Street, Ellen Street and Michael Street will all be upgraded to create a high quality walkable environment, a key hub between Irish Town and Arthur's Quay.
- New uses will draw pedestrians up from O'Connell Street, creating new footfall and activating streets and providing stronger pedestrian links to the Hunt Museum and King's Island to the north;
- Streetscape investment should reflect the quality of new buildings along this frontage, creating a gateway onto Limerick's shopping core from the north;
- Public space at Bank Place should be invested in and strengthened to provide a high quality landscape setting for the new buildings addressing the Canal and Charlotte's Quay.

Adjacent Projects

- Arthur's Quay renovation;
- Streetscape upgrade on Patrick Street;
- Streetscape upgrade at Charlotte's Quay and Bridge Street; and
- Pedestrian and visitor signage from Patrick Street and the Hunt Museum.

Figure 26: View of Opera Site across the Abbey River



Figure 27: View of public realm and office use



Project Summary

Table 17: Project Summary

Opera Centre	Project	Outcome	Uses	Site Area/ Footprint (sam)	Height / Storeys	Potential Floorspace (sam)
Renovation	Granary	Full Use	Office	2,100	4	8,400
	Upper Patrick Street	Full Use	Resi, Office, Higher Ed	5,300	4	21,200
Development	Main Site	New and Full Use	Office, Higher Ed, Retail	3,900	4	15,600
Public Realm	Interior 'Quad'	Courtyard Respite		3,700		
	Bank Place Square	Stronger Gateway		1,100		
	Mid Block ped. link	New connection		100		
	Ellen Street	High Quality Street		300		
	Patrick Street	High Quality Street		350		
	Michael Street	High Quality Street		250		

Implementation

6.92 The following sets out expected delivery partners and the local authorities' role for key projects.

Table 18: Implementation

Opera Centre	Project	Delivery Partners	City Role and Delivery Requirements
Renovation	Granary	Dev Partner	Planning
	Upper Patrick Street	Dev Partner	Planning, Heritage flexibility
Development	Main Site	Dev Partner	Planning, Assembly, Disposal
Public Realm	Interior 'Quad'	Dev Partner	Design Requirements
	Bank Place Square	City and County Councils	Design Requirements
	Mid Block ped. link	Dev Partner	Design Requirements
	Ellen Street	City and County Councils	Design, Funding
	Patrick Street	City and County Councils	Design, Funding
	Michael Street	City and County Councils	Design, Funding

Arthur's Quay

- 6.93 Arthur's Quay encompasses the Arthur's Quay Shopping Centre, the surrounding highways, Arthur's Quay Park and Sarsfield House, as well as the tourist information office and visitor centre. The City Centre opens up here to provide views across a major bend in the Shannon as well as the tidal range of the Estuary, and major landmarks along the River's edge. This location is heavily influenced by its role as a one-way through traffic route and is impacted by retail service yards and car parks at the rear of Arthur's Quay Shopping Centre, Penneys and Debenhams.
- 6.94 Sarsfield House, which is occupied by approximately 600 Revenue Commissioners staff, is a building which due to its location prevents the City Centre engaging fully with the spectacular River views towards King's Island and the Castle. Ideally, Sarsfield House should be redeveloped and new fit-for-purpose office accommodation provided on the Opera Site to house the Revenue Commissioners.
- 6.95 This is a major opportunity to reposition and strengthen City Centre shopping and change the character, quality and connectivity of the Waterfront.

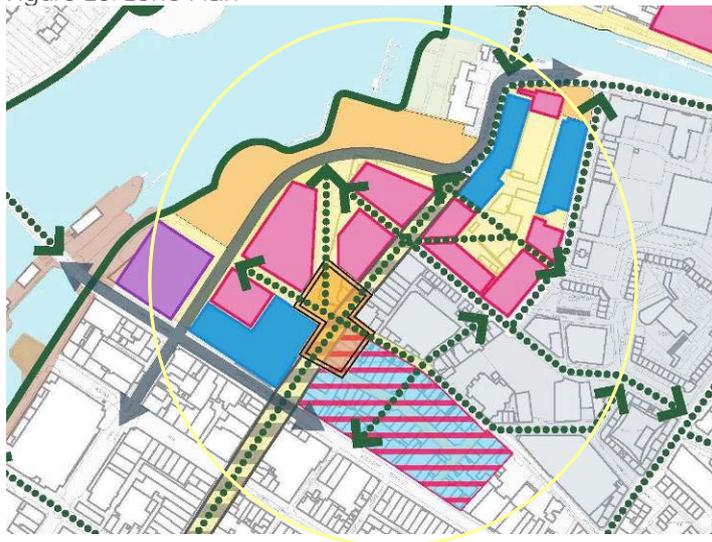
Vision

- 6.96 *Arthur's Quay will be transformed through major redevelopment of the existing Arthur's Quay Shopping Centre to provide a new shopping development on this Site and including sites to the rear, including part of Arthur's Quay Park, plus a major renovation and expansion of Waterfront open spaces and public realm. A new City Square will be created connecting across O'Connell Street to Cruises Street. This major new development will secure Limerick's role as the premier shopping destination on the West coast of Ireland, increasing visitors, footfall and spend across the City Centre, with linked benefits to the patronage of restaurants, hotels, dining and cultural institutions. The Sarsfield House Site will be transformed into a new Waterfront open space, with the demolition of Sarsfield House and the relocation of the Revenue Commissioners, revealing the River to the City centre.*

Photomontage of potential new public realm and Park at Arthur's Quay



Figure 28: Zone Plan



Key Components

Arthur's Quay Shopping Quarter

- A major new retail development will replace the Arthur's Quay Shopping Centre and expand onto a series of new retail development blocks addressing Arthur's Quay Park;
- This could include a new 10,000 sqm+ retail anchor to the east of Arthur's Quay Shopping Centre. Plus a range of other shop units/bars and restaurants fronting a new City Square - about 10,000 sqm;
- The one-way through highway realigned to City street fed with a more pedestrian - friendly focused character and lined by active uses that engages with the public realm along the River;
- A high quality façade and new entrances will address the Waterfront;
- A new City Square will be created where Denmark Street and O'Connell Street meet. A high quality and integrated approach to the streetscape, framed by shops connecting to Cruises Street at O'Connell Street;
- The existing Penneys and Debenhams Stores will be renovated including redevelopment to the rear of Penneys. Potential for joint service yard for use with adjoining retail uses; and
- Delivery and service arrangements will be upgraded to minimise impact on the public realm, particularly during daytime and evening hours.

A New Public Waterfront

- Arthur's Quay Park will be transformed into a signature Waterfront public space that draws visitors, hosts special events and provides a key stopping point within the City Centre and along the Waterfront and Riverwalk;
- This new Riverside Park will run the length of the City Centre from Sarsfield Bridge through where Sarsfield House currently stands, along between the Hunt Museum and the River and over a new pedestrian bridge into a pedestrianised Potato Market area linking up to the upgraded King John's Castle tourist attraction;
- A new appropriately sized iconic building could be developed in the new Riverside Park on the former Dunnes Stores Site to accommodate tourism/cultural uses;
- New landscape, trees, surfaces, lighting, furniture, public art and interpretation should be structured to create a landmark Waterfront Park, designed to international standards reflecting the prominence of this location within Limerick;
- A new space should be defined to host public events including celebrations, performance, festivals and start and finish points to Limerick based marathons and races;
- Clear, high quality pedestrian connections from Patrick Street and O'Connell Street and Henry Street would draw people to the Park;
- Signage and materials should identify the water's edge as part of the continuous Riverwalk linking bridges across the Shannon and the two sides of the Shannon River;
- A new public open space should be created at the Sarsfield House site in the event of government office relocation, to reveal the view north along the Shannon to King's Island from the City Centre and extend Arthur's Quay Park;
- The Waterfront and public space at the Hunt Museum should be strengthened to provide an intimately scaled green space with external seating from the Hunt Museum restaurant and destination in its own right along the Riverwalk.

Hunt Museum

- The Hunt Museum, one of the City Centre's major assets, would be revealed by the removal of Sarsfield House. It would be strengthened by better access from the River Shannon, investment in the garden and Waterfront to the rear and highlighting this destination in clear pedestrian signage and interpretive displays along the Riverwalk;

Adjacent Projects

- Opera Site redevelopment;
- The Riverwalk;
- Streetscape upgrade at Charlotte's Quay and Bridge Street;

- Streetscape upgrade Patrick Street;
- Ellen Street Streetscape; and
- Streetscape upgrade O’Connell Street.

Figure 29: View of Arthur’s Quay



Project Summary

Table 19: Project Summary

Arthur's Quay	Project	Outcome	Uses	Site Area/ Footprint (sqm)	Height / Storeys	Potential Floorspace (sqm)
Renovation	Penneys / Debenhams	Stronger retail core	Retail	5,050	4	20,200
Development	Arthurs Quay Quarter	Stronger retail core	Retail	12,000	2.5	22,500
Public Realm	Patrick St. Streetscape	Stronger gateway		350		
	Arthurs Quay Streetscape	High quality Streets		300		
	Ellen Street link	Stronger connection		100		
	City Square	City Centre destination		3,400		
	New Arthur's Quay Park	City Centre destination		4,500		
	Enhanced Riverwalk	Stronger Riverfront		350		
	Sarsfield Park	New Riverfront Park		6,400		
	Hunt Museum Riverfront	Stronger Riverfront		2,600		
Transport	Street Realignment	New site framework				
	Traffic Re-circulation	Traffic-pedestrian balance				

Implementation

6.97 The following sets out expected delivery partners and the local authority's role for key projects.

Table 20: Implementation

Arthur's Quay	Project	Delivery Partners	City Role and Delivery Requirements
Renovation	Penneys / Debenhams	Owner	Planning, Incentive Regime
Development	Arthur's Quay Quarter	City and County Councils Dev Partner	Planning, Land, Assembly, Incentives, Disposal
Public Realm	Patrick St. Streetscape Arthurs Quay Streetscape Ellen Street link City Square New Arthur's Quay Park Enhanced Riverwalk Sarsfield Park Hunt Museum Riverfront	City and County Councils City and County Councils	Design, Funding Design, Funding Design, Funding Design, Funding Design, Funding Design, Funding Design, Funding Design Requirements, Fundraising
Transport	Street realignment Traffic re-circulation	City and County Councils City and County Councils	Design, Funding Design, Funding

Irish Town

6.98 Irish Town lies to the south of the Abbey River and Charlotte's Quay. It is notable for the retention of its organic street grid, a series of smaller scale and independent development blocks between the Medieval Quarter and the Georgian Quarter that are a legacy of its history as a Medieval settlement. Today it is home to a range of commercial and business activities, including office buildings and workshops, the Milk Market and a restaurant and evening economy district at Denmark Street. A range of housing developments from 20th Century social housing projects to more recent market generated developments provide a residential base in this area. One of the most interesting features is John's Square development by Pery in the mid 18th Century prior to embarking upon the development of Newtown Pery. This is also home to the Limerick landmark St. John's Cathedral. In addition to these assets there are a number of potential development sites and stalled development projects within Irish Town. This is seen as a longer term regeneration project.

Vision

6.99 *The evolution of Irish Town takes the form of a holistic regeneration programme following delivery of the Opera Site, Arthur's Quay and Cruises Street. The plan envisages a mixed use future, building upon existing uses – residential, market, small business, leisure and culture. The Milk Market, John's Square and St. John's Cathedral will become highlights for visitors to Limerick. John's Square will build upon its cultural credentials focused on dance and the performance venue in the church to become a strong Cultural Quarter in the City. Local*

businesses and shops will gain from increased economic activity at the nearby Opera Site development, and an increased daytime, evening and weekend population.

Figure 30: Zone Plan



Key Components

- An open street market around the Milk Market and linking The Market to the City Centre at weekends or on other identified days;
- The creation of a cultural quarter at John's Square;
- Potential for higher education City Centre campus, if this is not delivered on the Opera Site;
- Infill residential and commercial development;
- Extend streetscape treatment and visitor signage along Ellen Street and Denmark Street from Patrick Street to create stronger footfall into Irish Town;
- Extend streetscape along gateway streets at the edge of Irish Town including Broad Street and John's Street and Mungret Street;
- Improve the walking quality of streets throughout Irish Town with on-going street refurbishment including maintenance and cleaning, de-cluttering, limiting large directional signage and a targeted approach to pedestrian signage and visitor guides and interpretation.

Adjacent Projects

- The Opera Site redevelopment;
- Cruises Street redevelopment/renovation;

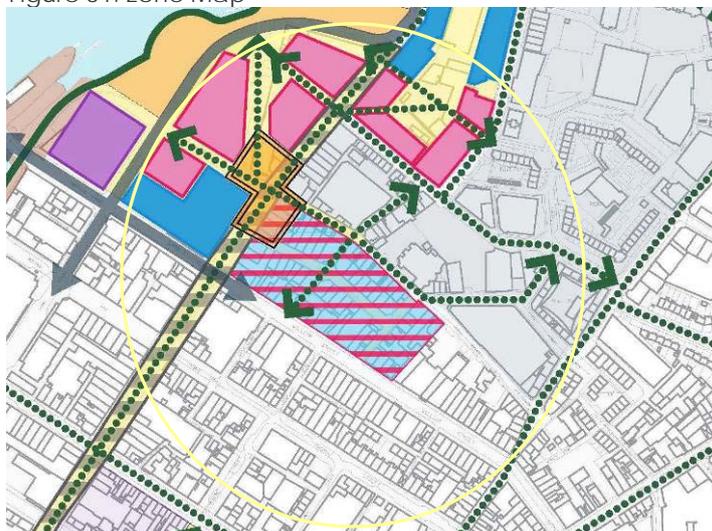
Cruises Street

6.100 Cruises Street is an outdoor pedestrainised shopping street development located in Limerick’s retail core. This 13,500 sqm development opens onto Limerick’s main street – the Patrick Street / O’Connell Street corridor and sits just to the north of William Street. Pedestrian links connect Cruises Street through to Denmark Street (where there is a cluster of night time economy activity) and to the Milk Market and Irish Town. This is a highly visible shopping location, the success or failure of which impacts the perception of the City Centre’s retail core. Recent years have seen an increase in retail vacancies as the industry restructures and responds to recession. The units are too small to meet current market requirements and are often in individual ownerships which inhibits consolidation. As leases come forward for renewal the vacancy levels are likely to increase. A comprehensive solution is required, probably a combination of renovation and redevelopment.

Vision

6.101 *Cruises Street will be transformed by a combination of renovation and redevelopment, allowing a wider range of shop types to meet market requirements, including the new City Square fronting O’Connell Street ringed by shops and restaurants/cafés. The pedestrian links with the Milk Market will be kept and improved drawing visitors to the shopping core.*

Figure 31: Zone Map



Key Components

Cruises Street ground floor retail frontages

- Reconfiguration of units to create larger ground floor units;
- Internal relocations of retailers currently over multiple floors to ground floor operations to activate all frontages, increase product visibility and shopper convenience;
- Façade renovation throughout;

Cruises Street upper floors

- Allow selected change of use for vacant upper floors, particularly of three storey corner units to activate buildings and frontages;
- Allow educational or office uses on O'Connell Street;
- Allow residential on interior blocks;
- Renovate façades and entrances to upper floor residential units on Denmark Street;
- Public realm improvements;
- Upgrade the public realm to include high quality lighting, landscape coordinated with investment at Arthur's Quay and O'Connell Street;

Adjacent Projects

- Opera Site redevelopment;
- Arthur's Quay redevelopment;
- Streetscape upgrade O'Connell Street.

Project Summary

Table 21: Project Summary

Cruises Street	Project	Outcome	Uses	Site Area/ Footprint (sqm)	Height / Storeys	Potential Floorspace (sqm)
Renovation	Retail Blocks ground	Reinforced shopping core	Retail		2-3	3,000
	Retail Blocks upper	Stronger economic base	Retail, Commercial			3,000
	Residential Blocks	Active use	Residential			3,000
Public Realm	Internal renovation O'Connell Street streetscape	Refreshed image City Centre integration		2,600 100		

Implementation

6.102 The following sets out expected delivery partners and the local authority's role for key projects.

Table 22: Implementation

Cruises Street	Project	Delivery Partners	City Role and Delivery Requirements
Renovation	Retail Blocks ground	Owner	Planning, Incentive regime
	Retail Blocks upper	Owner	Planning, Incentive regime
	Residential Blocks	Owner	Planning, Incentive regime
Public Realm	Internal renovation O'Connell Street streetscape	City and County Council City and County Council	Design, Funding Design, Funding

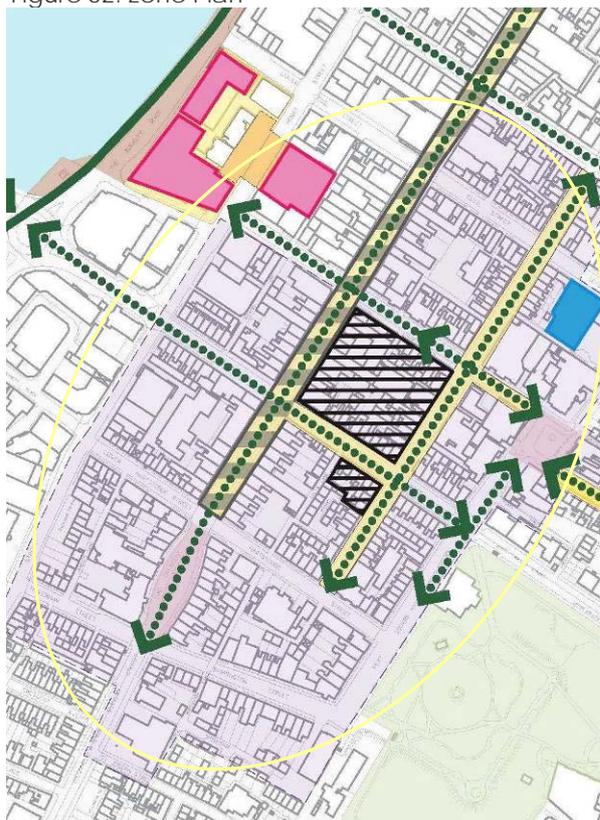
The Georgian Quarter

- 6.103 A significant part of Limerick's City Centre is characterised by a Georgian grid of streets and blocks. Limerick's main central City streets, Catherine, O'Connell, Henry, Lower Mallow and Roches streets are key parts of this grid. The core area that makes up the Georgian Quarter encompasses Barrington Street to Cecil Street and O'Connell Street to Pery Street. Many buildings have characteristic Georgian features including: a consistent brick or stone streetwall with a shallow setback from the back of the pavement; four and five storey façades above street-level with garden level building spaces below, raised entrances and repetitive approaches to the placement of larger, vertically oriented windows and flat roofs. Buildings were constructed either during the Georgian period, or these design principles were applied later. The Georgian Quarter hosts a range of residential, small business, hotel, educational and cultural activities. Key places such as O'Connell Square, Baker Square and Pery Square are key place markers within this area. There is a cluster of listed buildings south of Glentworth Street in particular. For many the Georgian district is the gateway experience of Limerick City Centre, from Shannon Bridge or the Dock Road. There is an opportunity to fully capture the heritage value of this area to support City visitors, build upon the existing business base and re-establish a private residential neighbourhood.
- 6.104 There is a growing need to attract more people living in houses (not apartments or tenants) to live in the City Centre. A recently introduced owner-occupied tax incentive will be beneficial to attracting owners to renovate Georgian properties and the application of rules and regulations for the refurbishment and conservation of historic properties must be applied sensitively to encourage investment. It is hoped that this new tax incentive will help to revitalise this Quarter.

Vision

- 6.105 *The Georgian Quarter will experience on-going renovation of its building stock with a substantial increase in the number of residents and level of business activity to create a bustling and vibrant mixed use residential and business district. Up to 200 individual addresses will be renovated. This will start with a Limerick City and County Council led pilot scheme for a selected whole Georgian block, or elements of a block. External renovation and interior reconfiguration will retain essential character while providing the flexibility needed to accommodate new uses and occupiers and support essential viability. On-going street refurbishment will include maintenance and cleaning, de-cluttering, limiting large directional signage and a targeted approach to pedestrian signage and visitor guides and interpretation. Catherine Street will be celebrated as a street connecting the Georgian Quarter to the shopping core of Limerick.*

Figure 32: Zone Plan



Key Components

Georgian Building Renovation

- A joint national and local government initiative to lead the renovation and activation of a target Georgian block to demonstrate planning, construction and occupier feasibility for internal and external renovation.
- A flexible approach to internal features and configuration, allowing creation of larger entrance and lobby spaces; consolidation of floors between units to create larger floor spaces; reorganisation of walls to create a range of residential room spaces; and reorganisation of stair cores to allow elevators to be installed; and
- Apply a range of tax incentives to include reduced sales tax on building materials; tax incentives for local construction labour hiring and reduced business rates for commercial.

Public Realm Investment

- Highlight and invest in Catherine Street as Limerick's Georgian thoroughfare, a central corridor linking the shopping core, the Fashion Quarter to Georgian Core and heritage features and cultural destinations including the Crescent, the Limerick City Gallery of Art and the People's Park;
- Improve the walking quality of streets throughout the Georgian Quarter with on-going street refurbishment, should include maintenance and cleaning, de-cluttering, limiting

large directional signage and a targeted approach to pedestrian signage and visitor guides and interpretation.

Centre for Excellence in Digital and Media

6.106 The Plan supports in principle the concept by Limerick VEC of a facility in the Athenaeum Hall and Office of Public Works (OPW) building on Cecil Street to house a digital media education and training, incubation and forum for participants in this sector. The scheme envisages four auditoria, a multi-purpose lecture and performance space, digital lounge and business space/training suites. This is subject to further feasibility analysis.

Adjacent Projects

- Cruises Street;
- Colbert Station renovation and Davis Street streetscape improvements;
- Streetscape upgrade of O’Connell Street;

Project Summary

Table 23: Project Summary

Georgian Quarter	Project	Outcome	Uses	Site Area/ Footprint (sqm)	Height / Storeys	Potential Floorspace (sqm)
Renovation	Target block renovation	Full Use, New identity	Residential, small business, hotel			25000
	Digital Media, Arts, Film Centre	Full Use, New identity	R&D, performance, demonstration, education	2000	3	6000
Public Realm	O’Connell Street	High quality street		600		
	Catherine Street	High quality street		450		
	Pery Square	High quality street		250		
	Glentworth Street	High quality street		300		

Implementation

6.107 The following sets out expected delivery partners and the local authority’s role for key projects.

Table 24: Implementation

Georgian Quarter	Project	Delivery Partners	City Role and Delivery Requirements
Renovation	Target Block Renovation	Owners	Planning, Incentive regime, Heritage flexibility
	Digital Media, Arts, Film Centre		
Public Realm	O’Connell Street	City and County Council	Design, Funding
	Catherine Street	City and County Council	Design, Funding
	Pery Square	City and County Council	Design, Funding
	Glentworth Street	City and County Council	Design, Funding

Limerick Quays

- 6.108 This quayside is the front garden to Limerick City Centre and must reflect this visibility and role. A key element is the redevelopment of the block at Bishop's Quay. This is a high visibility location along the Waterfront between Lower Cecil Street and Mill Lane, particularly from the Shannon Bridge gateway to the City Centre. It is also highly visible as traffic is directed along Henry Street after arrival into the City Centre. This block includes the utilitarian Garda Station, a series of low rise structures and parking areas facing the Shannon as well as two more historic structures facing onto Henry Street. There is a newer residential development at the corner of Lower Cecil and Henry Street. Bishop's Quay is an opportunity to complete this development block and establish a high quality frontage to the River and Shannon Bridge.

Vision

- 6.109 *Limerick Quays will be defined as the principal visitor and entertainment zone in the City Centre – passive and active – accommodating a new visitor destination, walking, as well as eating and drinking in bars and restaurants that will activate the quays overlooking the River. This will be fully pedestrianised.*
- 6.110 *A new Limerick destination could incorporate performance, display, conference, public lectures, teaching, Limerick City research, and visitor and tourist information space. Exhibits from national collections will be hosted here. Limerick's role in technology, arts and culture will be promoted here and incorporate the Authentic-Innovative-Progressive attitude to Limerick. A new high quality contemporary space for visitor information will promote Limerick and its place in the wider Mid West Region. A new, signature building will be designed to international standards reflecting the prominence of this location within Limerick. An integrated approach to public realm, landscape and the Riverwalk will connect this location to the new Arthur's Quay Park and Bishop's Quay to the south providing a comprehensive destination for City and County residents and regional and international visitors.*
- 6.111 *The Bishop's Quay Site will become a high quality, mixed-use development. This may include a replacement Garda facility, commercial office space, or residential with active ground floor uses on the Riverside. The block will evolve over time, replacing the least occupied buildings first. The two historic houses fronting onto Henry Street should be retained. The emphasis will be on the highest quality design, façades and materials. Minimum heights will be set by historic buildings on Henry Street. Any taller components will be placed to respond to the surrounding context while allowing views through the Site. Streetscape and Riverwalk improvements and replacement of Henry Street surface parking with a landscaped forecourt will fully integrate Bishop's Quay into the City Centre pedestrian and public realm.*

6.112 *The former Dunnes Stores site is not suitable for retail use given its location relatively remote from the main shopping area. It is better suited to cultural/civic use given its Waterfront prominence, and is suggested as the site for the new Limerick Cultural Centre.*

Figure 33: Zone Plan



Key Components

- A new building – ‘Limerick Cultural Centre’ on the former Dunnes Stores Site could incorporate new performance, display, conference, public lectures, teaching, Limerick City research and visitor and tourist information space;
- Exhibits from Ireland’s national collections could be hosted here. A permanent display could reflect Limerick’s Medieval, Georgian, Industrial and Independence roles;
- Limerick’s role in technology, arts and culture could be promoted here and incorporate the Authentic~Innovative~Progressive attitude of Limerick. A particular focus on the promotion of research and technology development from higher education institutions and the business sector across the wider Limerick area could be incorporated. Creative science events and outreach could highlight Limerick’s innovation role within the central City;
- A new high quality contemporary space for visitor information could promote Limerick and its place in the wider Region;
- A new public space should be created between the structure and the water’s edge, addressing the Boat House and Lock and extending the Waterfront open space;

- The new destination could be placed on the junction of Henry Street/Liddy Street and Sarsfield Street, with a new structure continuing the streetwall;
- Redevelopment of Bishop's Quay block for mixed use offices, residential and leisure use;
- Improved pedestrian environment and public realm improvement along entire Quayside with new boardwalk, improved lighting and signing;
- Encouragement of active leisure – bar/restaurant uses along the Quayside; and
- Re-orientation of car traffic to access the multi-storey car parks via Henry Street.

Adjacent Projects

- Arthur's Quay Shopping Development;
- Realignment and streetscape for Arthur's Quay;
- Arthur's Quay Park;
- The Riverwalk; and
- Georgian Quarter Renovation.

Figure 34: View from Clancy Strand towards Howley's Quay and Arthur's Quay



Project Summary

Table 25: Project Summary

Limerick Quays	Project	Outcome	Uses	Site Area/ Footprint (sam)	Height / Storeys	Potential Floorspace (sam)
Development	New visitor destination	Visitor increase, dwell time, new landmark	Visitor facility, destination, promotion, conferencing, teaching,	4,400	3	13,200
	Bishop's Quay	Stronger Gateway	Improved Waterfront, leisure	6500	4	26000
Public Realm	Riverfront Park	Stronger Riverfront		1,500		
	Enhanced Riverwalk	Stronger Riverfront		100		
	Henry St. streetscape	High quality street				
	Enhanced Riverwalk	Stronger Riverfront		450		
	Cecil Street streetscape	High quality street		110		
	Mill Street streetscape	High quality street		110		

Implementation

6.113 The following sets out expected delivery partners and the local authority's role for key projects.

Table 26: Implementation

Limerick Quays	Project	Delivery Partners	City Role and Delivery Requirements
Development	New visitor destination	City and County Councils, Shannon Development, Fáilte Ireland	Planning, Land, Assembly, Programme, Design, Fundraising
	Bishops Quay	Existing owner, Development Partner	Planning, Incentive regime
Public Realm	Riverfront Park	City and County Councils, Shannon Development, Fáilte Ireland	Design, Funding
	Enhanced Riverwalk		
	Henry St. streetscape		
	Enhanced Riverwalk	City and County Councils	Design, Funding
	Cecil Street streetscape	City and County Councils	Design, Funding
	Mill Street streetscape	City and County Councils	Design, Funding

Eastern Gateway

6.114 Colbert Station is an important gateway/entrance point for Limerick City. At present it does not serve the City well; the front of the Station is cluttered with cars and the bus parking/pick up facility to the south of the Station is poor, plus the pedestrian links to the City Core are very poor. The plan envisages a comprehensive renovation to address these issues and create an appealing front door to Limerick.

Vision

6.115 *An enhanced Station building with new landscaped Plaza at the front of the station. This links into a new Bus Station to the north side of the Rail Station with a linked access between the two. All car parking removed from the front of the Station and located on the site of the*

existing bus station. The land to the south of the Station fronting Boherbuoy across the traffic island and including the football pitch and poor quality shopping/housing potential subject to comprehensive renovation/redevelopment for mixed use/business led development could be the location of the new Urban Science and Technology Park subject to further feasibility.

Key Components

- Enhanced Station concourse;
- A new Bus Station;
- A new Plaza in front of Station and improvement across Parnell Street to Davis Street; and
- Longer term renovation/redevelopment of land to south of the Station.



Colbert Station



Adjacent Bus Station

Adjacent Projects

- Georgian Quarter Renovation

Project Summary

Table 27: Project Summary

Eastern Gateway	Project	Outcome	Uses	Site Area/ Footprint (sqm)	Height / Storeys	Potential Floorspace (sqm)
Development	Station north	Stronger Gateway		3,500	3	10,500
	Hyde Road	Stronger Gateway		3,500	3	10,500
Public Realm	Colbert Station forecourt	Stronger Gateway		2,900		
	Davis Street streetscape	High quality street		150		
	Parnell Street streetscape	High quality street		250		
	John's Square	New Identity				

Implementation

6.116 The following sets out expected delivery partners and the local authority's role for key projects.

Table 28: Implementation

Eastern Gateway	Project	Delivery Partners	City Role and Delivery Requirements
Development	Station north	CIE, Owners	Planning, Incentive regime
	Hyde Road	Owners	Planning, Incentive regime
Public Realm	Colbert Station forecourt	CIE	Design, Fundraising
	Davis Street streetscape	City and County Councils	Design, Funding
	Parnell Street streetscape	City and County Councils	Design, Funding
	John's Square	City and County Councils	Design, Funding

Urban Science and Technology Park

- 6.117 The former 'Cleeves' Site at Stonetown Terrace sits at a highly visible gateway position close to the Shannon Bridge and visible along the Shannon River. This location will require a long term strategy to address this large development site. It is recommended that this site be considered for an Urban Science and Technology Park at the edge of the City Centre. (Alternatives could be at Colbert Station or on the Southern Docks).

Project Summary

Table 29: Project Summary

Urban Science and Tech Park	Project	Outcome	Uses	Site Area/ Footprint (sqm)	Height / Storeys	Potential Floorspace (sqm)
Development	Riverfront Site	New identity	Science and Tech	5,000	2	10,000
	North Site	Stronger Gateway	Science and Tech	5,000	2	10,000

Implementation

- 6.118 The following sets out expected delivery partners and the local authority's role for key projects.

Table 30: Implementation

Urban Science and Tech Park	Project	Delivery Partners	City Role and Delivery Requirements
Development	Riverfront Site	Owners, Dev Partner	Planning, Incentive Regime
	North Site	Owners, Dev Partner	Planning, Incentive Regime

- 6.119 The Docks Area to the immediate west of Steamboat Quay has been the subject of a number of investigations in recent years. This is envisaged to be a longer term opportunity. It has the potential for mixed use residential development. It is, however, an alternative site for a science and technology park instead of the former 'Cleeves' Site. It is recommended that future steps consider the relative merits of these locations for employment based activity.
- 6.120 The following plan illustrates how the proposals relate to each other to produce an integrated Spatial Plan for the City Centre.

Limerick City Centre Spatial Plan

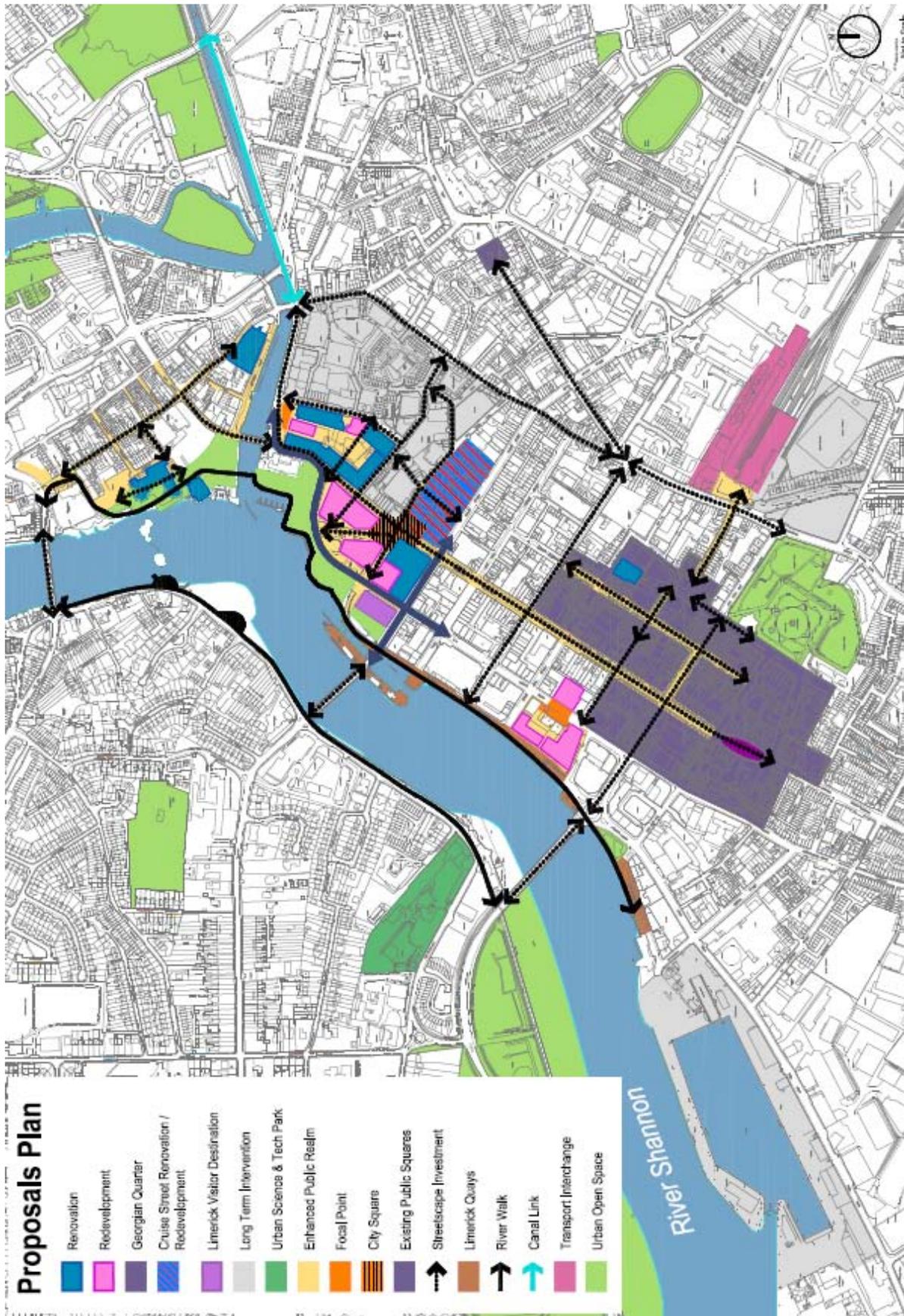


Figure 35: Overall City Centre Spatial Plan



Figure 36: City Centre Proposals – Aerial View 1



Figure 37: City Centre Proposals – Aerial View 2

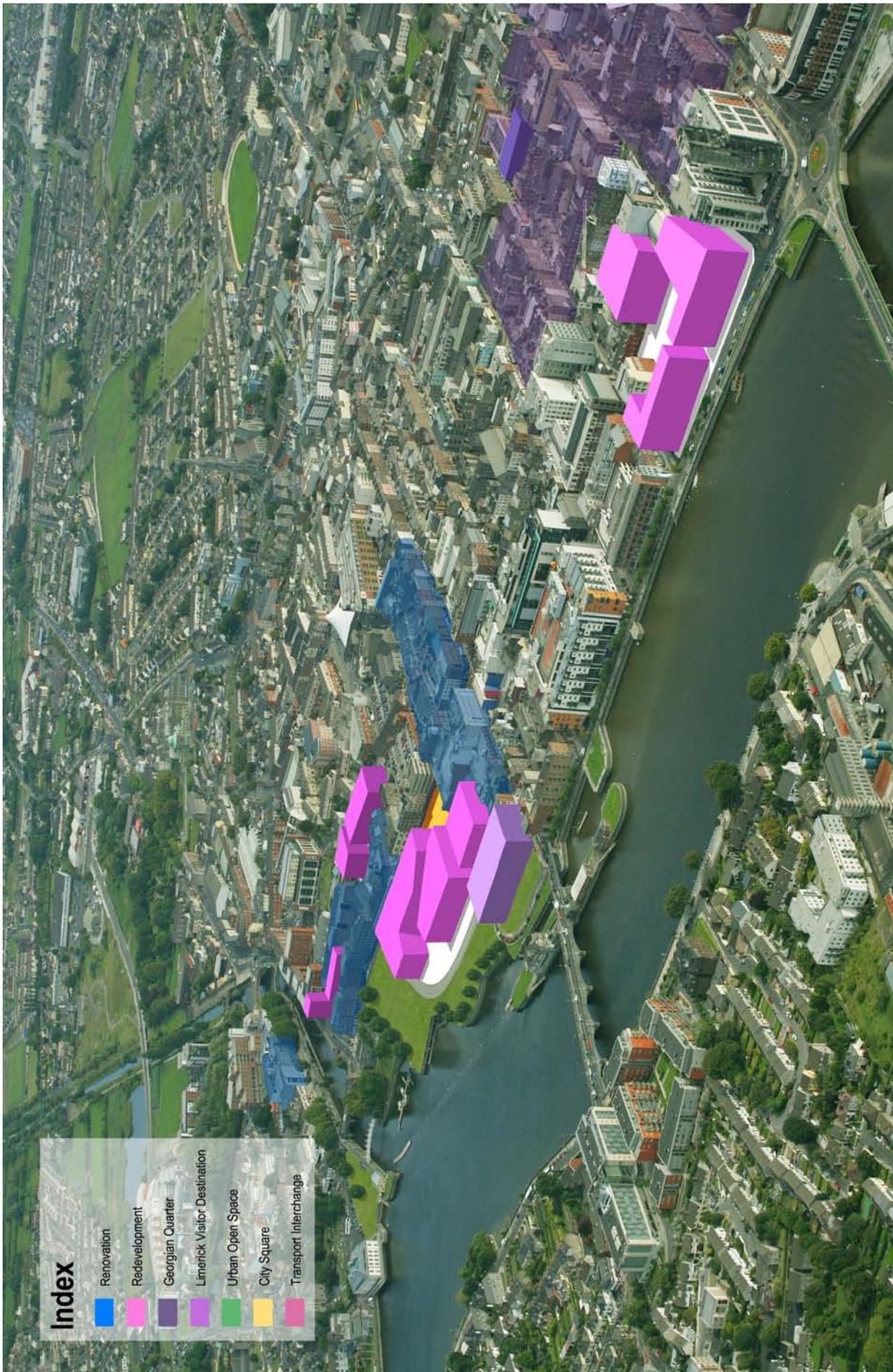


Figure 38: City Centre Proposals – Aerial View 3

7. Positioning Limerick

'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

Rationale

- 7.1 To allow Limerick to achieve its full economic potential there is a need to ensure a consistency of message and positioning for the City and County with local, national and international audiences. This will require a rationalisation of responsibility across public agencies at city, county, region and national levels, removing conflicting messages, as well as ensuring a close alignment of local and independent message carriers. Working more collectively with a coherent message can harness the collective influence of the many businesses, institutions and organisations who act as ambassadors for Limerick.
- 7.2 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 National 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 Limerick 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.
- 7.3 There is huge pride in Limerick and representatives of local business associations, higher educational institutions, cultural institutions, individual business owners and youth representatives display a fierce commitment to Limerick.
- 7.4 It is critical that Limerick harnesses this commitment as an antidote to the lazy messaging and media coverage. An authentic proposition is required that genuinely reflects the City's positive attributes, that can help promotion and deliver greater investment over a sustained period. This should be closely linked to the target economic sectors, but also the quality of life and quality of place that potential investors and visitors will seek. This must then be consistently used across a range of promotional activities by a range of partners targeting local, national and international audiences.

7.5 Coherence, consistency and longevity of the proposition and place marketing strategy, supported by partners and stakeholders and proactively championed by everyone will be key factors in Limerick achieving its full economic potential.

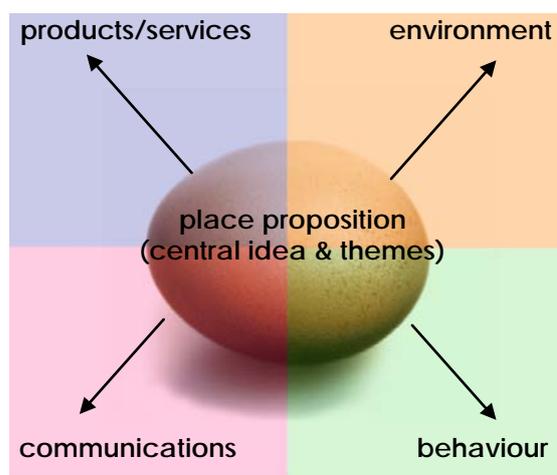
7.6 This proposition and place marketing strategy aims:

- To build a positive perspective about Limerick with regional, national and international audiences;
- To unify Limerick organisations with a shared sense of purpose and understanding of Limerick as a place;
- To grow and intensify 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, the County and the wider environs; and
- To support the ambitions of the new economic strategy and spatial plan.

The Proposition

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

Figure 39: Place Proposition



7.8 Drawing upon the insight, knowledge and opinion gathered through workshops, interviews, and wider research the new proposition:

- states confidently and assertively the strengths and attributes of Limerick;

- challenges false beliefs about Limerick people and place;
- surprises with a new statement about Limerick, its ambitions and its purpose;
- supports the City's new economic ambitions; and
- complements and joins up sector-specific propositions and messages.

7.9 And in its delivery, the proposition for Limerick reflects the following themes:

- 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; and
- newly unified, coherent and as one.

7.10 This comes together in a strategic, motivational and inspirational statement of intent.

Authentic~Innovative~Progressive

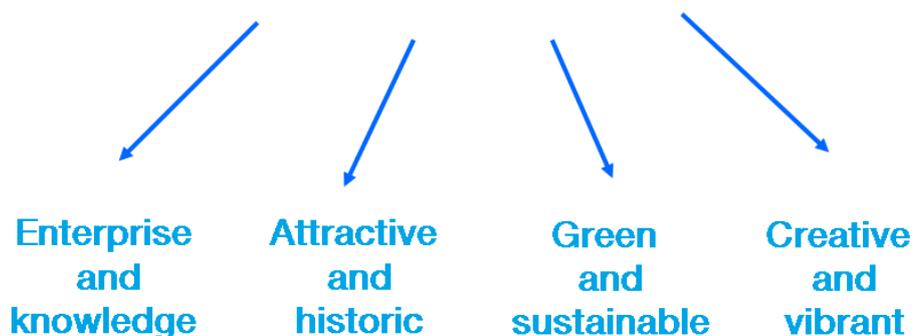
Authentic~Innovative~Progressive is a statement of intent, an essence, and a promise of what Limerick is, how it works and what it wants to be famous for. It embodies the cultural essence of Limerick as:

- An authentic place of substance with an impressive industrial and historic heritage;
- A place of authentic and innovative people – genuine, natural, real, welcoming, friendly, leaders and achievers;
- A place that has an innovative, progressive outlook to knowledge and innovation – look at our education and business assets; and
- A place that continues to exploit its natural resources with innovative and progressive ambition – low carbon economy, enhancing its city green credentials.

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

Figure 40: Statement of Intent

Authentic ~ Innovative ~ Progressive



Delivering the Proposition

- 7.12 Having developed a new, distinct proposition for Limerick, this must be shared widely amongst key stakeholders in Limerick, across the Mid West Region and ultimately through the diaspora and wider alumni.
- 7.13 In particular, delivery of the Marketing Plan for Limerick 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 corporate activity.
- 7.14 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 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.
- 7.15 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 (and not of the local authority), it will also provide a clear signal of how the new authority sees partnership working behind the place as the way forward.
- 7.16 A copy of the new Limerick Story is provided in Appendix 2.

Marketing Strategy

7.17 Successful place marketing has a number of clear characteristics:

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

7.18 The Marketing Strategy for Limerick will be based on the following principles:

- Bringing the Limerick proposition to life - gain buy-in and ownership of 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 ambassadors for Limerick within key organisations, the Limerick diaspora and wider City 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; and
- A unified approach - use the proposition and stakeholder engagement of this project to create a shared regard for a City-wide approach to marketing, with accountability

within one single organisation, responsible for economic development, planning, coordination, leading and alignment of all related promotional activity.

7.19 Whilst Limerick engages with a wide range of audiences, this place marketing strategy must prioritise the specific audiences it is seeking to influence so that activity can be appropriately targeted.

7.20 Therefore the proposed principal target audiences are:

- Residents and businesses - Limerick City and County;
- Residents and businesses of the wider Mid-West Region and Ireland;
- Tourist visitors to the West coast – Domestic, European and International;
- Potential economic investors and corporate transfers, as part of inward investment strategies; and
- Opinion formers in the local and Irish media.

7.21 The specific objectives of the Limerick Marketing Strategy are:

- To develop and maintain a Limerick ‘toolbox’ of materials, messages and collateral for distribution to and use by stakeholders;
- To create buy-in and support from key organisations to the aims and objectives of the place marketing strategy;
- To agree an events programme which encourages more local and regional residents and businesses and national visitors to experience the City Centre;
- To directly influence the future communications of organisations to deliver a consistent and coherent message about Limerick;
- 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 Colbert 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; and
- With partners, ensure future bespoke campaigns (including City of Culture 2014) are aligned behind the place proposition.

7.22 Bringing Authentic-Innovative-Progressive to life requires new thinking and to some extent new behaviour. It is therefore important that early activity provides exemplars of how this should be done, providing a benchmark for others and to set the context for ongoing work.

7.23 For example, ensuring that imagery always uses real Limerick places and people, rather than stock photography as a way of illustrating an up to date reality and delivering a modern, contemporary, progressive image, even when the focus may be on traditional history and heritage.

7.24 Appendix 2 sets out in detail the Marketing Strategy for Limerick, defining projects/programmes, timescales, costs and responsibilities. This is a guide that is to be refined and agreed by Limerick City and County Councils and all partners and stakeholders.

8. Outputs and Benefits

- 8.1 There are potentially significant economic and housing outputs to be achieved by this Strategy. Overall economic and employment outputs have been considered for the Limerick area as a whole, linked to growth in the sectors identified by the Economic Strategy within the Plan.
- 8.2 There is the potential to **create 12,000 new jobs** in the Limerick area in the sectors identified. The emphasis on high value jobs would go a considerable way to closing the €403m gap in economic performance by rebalancing the local economy to a knowledge economy to better reflect the wider Irish Economy. The creation of high value jobs creates spin off lower value jobs in support services which will meet needs of people with lower level skills and education. This is also entirely complementary to creating jobs for people with lower skill levels such as those in telesales.
- 8.3 At the same time, outputs for Limerick City Centre have also been identified across a range of sectors.
- 8.4 The potential for approximately **5,000 new jobs have been identified for Limerick City Centre**. This would include higher value jobs linked to key sectors identified by the Economic Strategy at locations such as the Medical Park at King's Island, the Opera Site, the Waterfront and the proposed Urban Science and Technology Park at the former 'Cleeves' Site. The Limerick Quays have the potential to accommodate additional office employment, as well as hotel and leisure employment. New jobs would also be generated by net additional retail development at Arthur's Quay in particular. A new visitor destination would also generate new employment.
- 8.5 These outputs represent a starting point based on targeted initiatives. Wider reinvigoration of the City Centre can be expected as the cumulative effect of major renovations, new development, and as increased activity, footfall and new residents are realised. Wider and secondary economic impacts can also be expected from this activity.
- 8.6 In housing terms, the potential **for a minimum of 1,000 new homes** in the City Centre has been identified. Again, this is based on targeted development zones. The wider invigoration of the City Centre can be expected to lead to organic and private sector led development activity which could substantially increase housing outputs. Renovation and conversion

activity will extend across the Georgian Quarter beyond the target pilot initiative block. Irish Town also offers the opportunity for renovation and infill development in the longer term.

- 8.7 A range of secondary impacts can also be expected – from construction jobs to secondary supplier, service and consumer spending growth.

9. Delivering the Plan

Delivery Structures

- 9.1 A key test for Limerick, will be how Limerick 2030 is implemented. Co-ordination arrangements need to put in place to ensure all the key stakeholders come together to provide an appropriate and coherent response to the challenges facing the City and County. The responsibility of the local authority in leading this programme needs to be clear and fully understood. The local authority will need to take the lead and sit at the heart of the delivery process. An appropriate policy platform should be established, this programme will need to reflect that this is a 15-17 year strategy. However, much can be done in the short term and immediate action should be taken to reverse the process of decline, to build confidence and to establish momentum around delivery.
- 9.2 Delivering the Strategy seeks to provide a broad framework for bringing together the various stakeholders that need to be involved in delivery. It is therefore very important that the High Level Economic Group recommended in the LRIG Implementation Plan be established at an early date and lead the delivery of this Strategy. A City Centre Management Business Unit has recently been established under the Economic Development and Planning Directorate of Limerick City and County Councils. The establishment of a **City Centre Strategy Implementation Group** acting of behalf of the City and County Councils, to help with the day to day implementation of the strategy is proposed.
- 9.3 Similarly, the interface between the work involved in promoting the revitalisation of the City Centre and the overall positioning and marketing of the City is addressed to ensure a cohesive approach.
- 9.4 Limerick City and County Councils must take the lead in implementing this Spatial Plan supported by other public bodies – most notably the IDA, Fáilte Ireland and Enterprise Ireland. It must also facilitate the involvement of the private sector – existing businesses and potential investors/developers. All duplication of effort needs to be removed and clear lines of demarcation established with Limerick City and County Councils at the centre.
- 9.5 It would also be advantageous for the business sector to unify its voice – a unification of the Chamber of Commerce and the Limerick Business Association.

- 9.6 This document advocates the adoption of an **'Implementation Forum Approach'**. To be initiated by Limerick City and County Councils and involving senior officers; the principal group would be the **City Centre Strategy Implementation Group**. This would involve senior business representatives, members of the higher education fraternity, tourism, enterprise, transport bodies and any other stakeholders as deemed appropriate.
- 9.7 A new marketing company to be set up by Limerick City and County Councils and managed by the Economic Development and Planning Directorate is to be established to properly sell Limerick locally, nationally and internationally. The Board of this company will be comprised of various business and public sector stakeholders from the City and County.
- 9.8 The role of the City Centre Strategy Implementation Group will be to:
- Have overall custodianship of Limerick 2030: An Economic and Spatial Plan for Limerick;
 - Put in place a high level business plan for the programme;
 - Delegate implementation duties and responsibilities;
 - Monitor progress;
 - Agree any change to the Economic Strategy and Business Plan as it is formulated;
 - Resolve any issues relating to its implementation; and
 - Help promote the Economic and Spatial Plan and its delivery.
- 9.9 The implementation group could be supported by a series of sub-groups – again public/private in make-up. This should address the following:
- City Centre development;
 - Transport and public realm; and
 - Tourism/culture issues – including delivery of the 'Limerick Cultural Centre' concept.
- 9.10 The detail of how this should work needs to be a first action point.
- 9.11 Limerick City and County Council is already leading on the delivery of the 2014 National City of Culture programme. It also needs to take the lead in developing a comprehensive and coordinated culture, arts and creative industry strategy for the City working with other relevant public sector institutions and the voluntary sector.
- 9.12 One project that requires specific attention is establishing the viability of the Limerick Cultural Centre concept for the Quayside. This requires detailed feasibility work and planning to make

the business case for the facility to allow wider City and national support. A core component of this project could be the National Diaspora Centre concept, at present this project concept is progressing. This project concept must be rapidly advanced and led by Limerick City and County Councils in a structured way to maximise the chances of the City successfully capturing this opportunity in the face of competition from other locations across Ireland.

- 9.13 One of the important components of Limerick 2030 is the branding and positioning strategy. The delivery of this Strategy will take time. However, it requires leadership from the local authority in adopting the Strategy and its principles, and for the local authority to become an advocate for its delivery and in setting up the structures necessary to spread the message.

Budgeting

- 9.14 Initial indicative costings for projects arising from the Economic and Spatial Plan are in the region of €250 million, over a period of 15 - 18 years.
- 9.15 At present there are a number of projects being formulated for consideration by the European Investment Bank (as part of the Plan as outlined, and other strategic developments) as follows:

Table 31: Sectoral Summary

Sector	Description	€million
3 rd Level Education	Limerick Institute of Technology	129
	University of Limerick	5
	Mary Immaculate College	<u>51</u>
	Sub -Total	185
Transportation	Shannon Airport	169
Limerick City Centre	City Centre Redevelopment Projects	196
Enterprise Development	Marine Energy Park Limerick Cleantech	10
TOTAL (Estimated)		€560 million

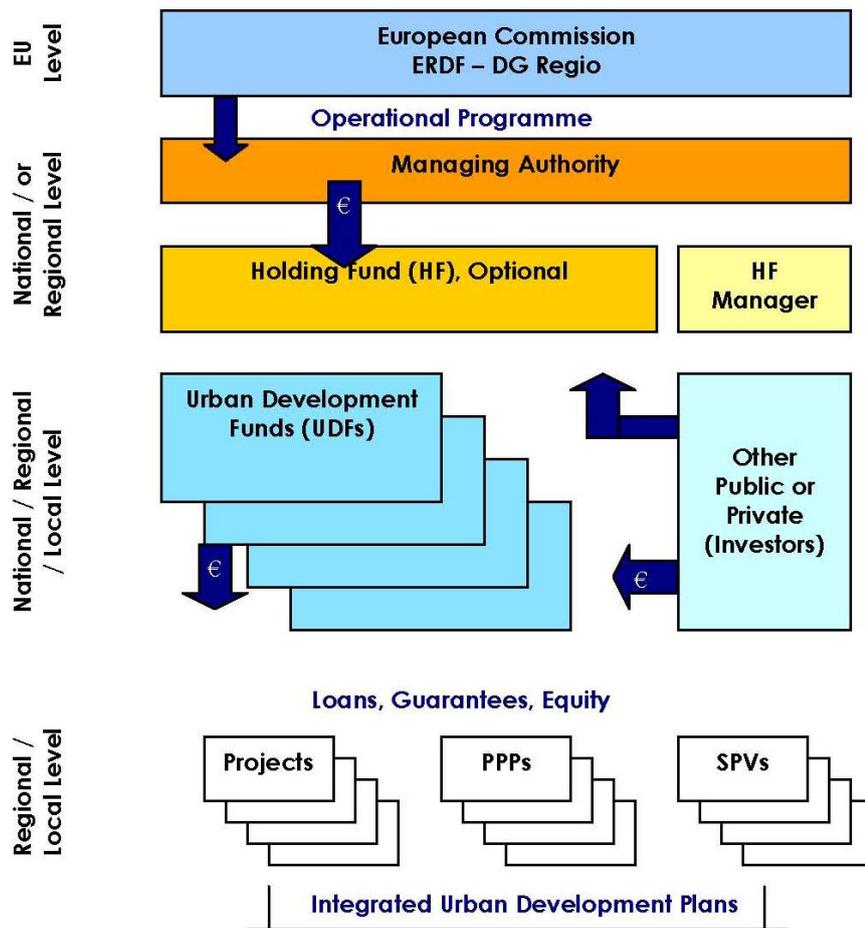
Funding

- 9.16 Substantial funding will be required to deliver the Economic and Spatial Plan. This money needs to be found from a combination of public, European Commission and private sector sources. It also requires the investigation of the potential utilisation of a number of more innovative funding mechanisms, including Joint European Support for Sustainable Investment in City Area (JESSICA) funding and Tax Increment Finance (TIF). The Spatial Plan also advocates the use of discrete and focused Tax Incentive regimes to encourage private investment.
- 9.17 It is recognised that public funding is likely to be relatively limited over the coming years and therefore needs to be carefully used. Nonetheless there are a number of existing funding streams from which Limerick can benefit. For example, tourism funding, heritage funding, Regeneration funding, education funding, transport funding, etc, in addition to potential funding directly from the local authority.
- 9.18 Consideration should be given to the creation of a **'Limerick Growth Fund'** which could take the form of either a grant or a loan designed to support projects and programmes that will have a private sector investment and create economic growth and sustainable employment. This could be of the order of €20m.
- 9.19 At the present time there is limited appetite from the private sector to invest in Limerick. This reflects a combination of factors including the wider economic downturn, the devastation of the construction industry, a lack of confidence in the public sector and general perception about the City as a whole. This position can be turned round on the back of a unified approach behind an agreed plan for the City – Limerick 2030, a clear programme of action, and by a commitment and demonstration attempt by Limerick City and County Councils to lead. If the circumstances are right there are developers who will invest in Limerick and it will be important to engage with these potential investors as soon as practically possible, building upon the engagement established through the exercise in preparing Limerick 2030.
- 9.20 The private sector will look to Limerick City and County Councils to help balance the risk to enable investment to happen. The use of local authority and wider public sector property, the waiving or deferment of a land value to the public sector and using public sector occupancy and covenant strength to underpin investments will be important.
- 9.21 This is particularly important where institutional investment or bank finance is being sought. In the current climate the opportunity to fund new development through institutional

investments and/or bank finance remains difficult. Current practice is to require at least 30% pre-let on commercial developments. Thus support through any government guarantee and/or a reduction in risk through a pre-let to a public sector tenant will be important.

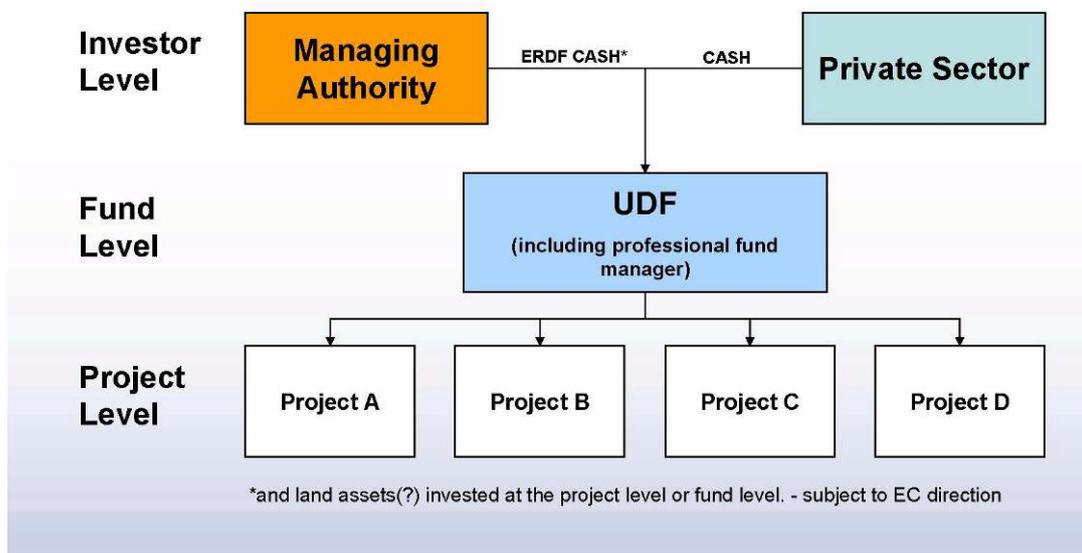
- 9.22 Consideration should be given to different funding mechanisms. Tax Increment Financing for example is an investment tool for financing infrastructure and other related developments. It is widely used in the USA and is currently being adopted in the UK. It is based upon the re-investment of a proportion of future business rates from an area back into infrastructure and related development.
- 9.23 This applies where the sources of funding available for schemes to deliver economic growth cannot cover the cost of infrastructure required by the scheme. TIF projects must be carefully planned. It is recognised that no other TIF programme has been initiated in Ireland to date and consideration would need to be given to the legislative implications of such a programme.
- 9.24 Consideration should also be given to the establishment of a JESSICA fund. The JESSICA fund is a revolving development fund, making loans for commercial property development, which are integrated into plans for sustainable urban developments.
- 9.25 In 2008 the European Commission together with the European Investment Bank recognised market failure in the development market as well as constraints for the existing (European Regional Development Fund (ERDF) Programme and established the JESSICA mechanism. The following diagram illustrates how JESSICA works.

Figure 41: JESSICA Funding mechanism



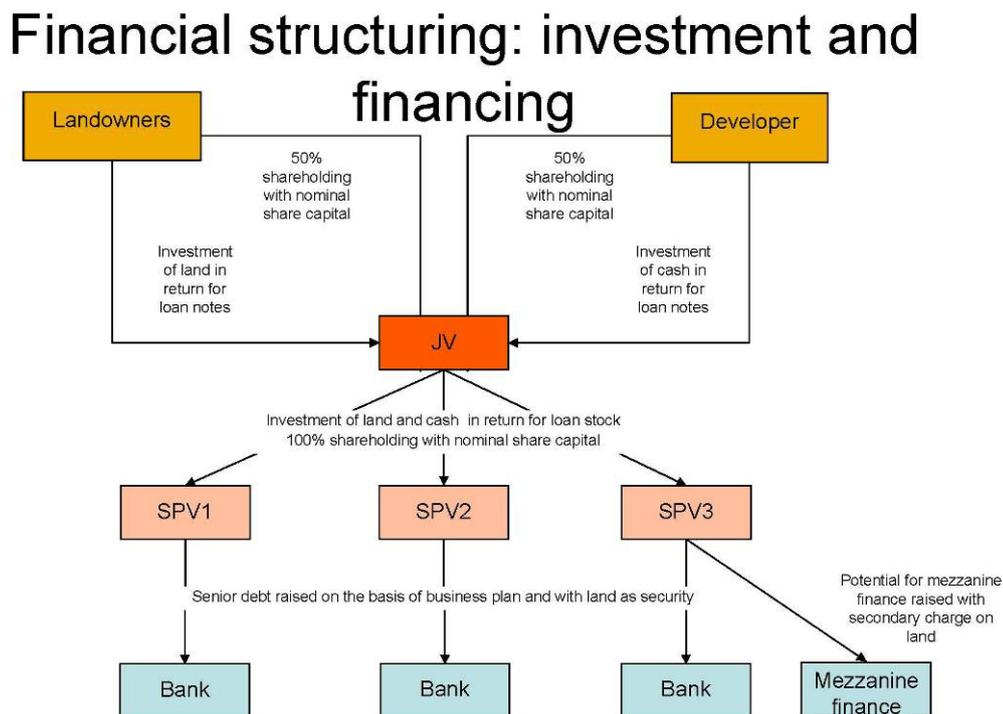
9.26 The following is a simple model

Figure 42: Jessica Funding mechanism



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- 9.27 JESSICA allows an authority, to use some of its European Structure Funds allocations to invest in a revolving fund. This can be used to lever additional private sector investment. JESSICA provides a new channel for ERDF funds to support important development projects that would otherwise not progress through the programmes existing requirements. ERDF funds can be utilised in a recyclable manner extending the benefits of the fund beyond the deadline for ERDF drawdown. However, terms and conditions for loans must be on commercial terms, thereby rendering JESSICA unsuitable for gap funding, or for marginal or high risk developments. However, an application has been submitted to the EU to revise this approach to allow below market loans.
- 9.28 The establishment of an Urban Development Fund or a Holding Fund Mechanism is necessary for the delivery of a JESSICA programme. This requires sufficient competence and independence of management, a comprehensive business plan and budget for undertaking qualifying projects as well as signed financial backing.
- 9.29 Public land will be essential to enable the successful implementation of Limerick 2030. One model by which this land can be put to best effect is what is known as a Local Asset Backed Vehicle (LABV) – see Figure 42. This is a corporate entity created by a partnership between public and private sector bodies. The public sector partner transfers real estate assets into the corporate entity and the private sector development partner provides development finance and expertise supporting the delivery of the development. The terms are shared between the partners on an agreed basis. LABVs are designed to encourage parties to pool resources such as finance, planning powers, land and expertise, in order to deliver regeneration. The model seeks to combine public sector assets and powers with the private sector experience capital and financial expertise. It can enhance the value of the public sector bodies assets and unlock development on a range of different sites and support the delivery of development in more marginal locations and on less viable sites.

Figure 43: Local Asset Backed Vehicle model



- 9.30 LABVs offer an approach to the delivery of a pipeline of projects through long-term partnership. It also reduces the burden of regulatory compliance through the assets transfer to the LABV.
- 9.31 However, appropriate sites must be carefully selected and the development partnering process must be carefully thought through and planned. LABVs are not a way of obliging developers to bring forward unattractive, low quality sites. Nonetheless, this is now being successfully used across the UK and is worth consideration in the Limerick context where land is available.
- 9.32 Limerick has benefited from previous tax incentive regimes. These have met with mixed success. Issues arose in the previous regime through a lack of discrimination on what should be supported or not. There was also a lack of detailed consideration of what the long term implications of supported schemes might be. Development was supportive for development sake in many instances. Nonetheless, private sector investment in Limerick is critically important to deliver key projects in the City Centre. The adoption of a well considered and

bespoke tax incentive regime is one means by which this can be achieved. This requires a clear definition of where tax incentives would be deployed geographically, the type of project that would be supported and the monitoring/management of the implementation process.

- 9.33 With these caveats three separate mechanisms are proposed. The first would be applied to encourage appropriate development of the core of the City Centre. This should be focused on the Opera Site/Arthur's Quay and the surrounding area. The primary focus of development in this locality would be retail, leisure and commercial offices. Care would be required to set the parameters for qualifying schemes to ensure that the required outputs and outcomes are delivered.
- 9.34 The second tax incentive regime is proposed for the Georgian Quarter as defined in the Plan. This would be focus on enticing private investment in the refurbishment of Georgian houses for owner occupation and for commercial business use. Restrictions would need to be put in place to prevent the sub-letting of premises for rent, either social or private in order to protect the underlying objective of increasing owner occupation in this quarter of the City Centre.
- 9.35 The third tax incentive regime proposed is based upon identifying certain locations within or adjacent to Regeneration Areas in Limerick City in order to encourage enterprise development and job creation in these communities.

Programme

- 9.36 Limerick 2030 is a medium to long term economic and spatial regeneration programme which will take 15-18 years plus to fully deliver the central vision and supporting objectives. There is no quick fix and no short term solution. Equally, there is no single action which will miraculously turn round the fortunes of Limerick. The current problems and issues are a long time in their gestation and will therefore require a systematic, structured response.
- 9.37 Limerick 2030 has brought focus to the interventions required to deliver the renaissance of the City. In years 1 – 5 there will need to be a focus on making substantial progress on one or two major transformation projects and making progress on organisation, responsibility, public realm and transport matters to provide confidence for the private sector to invest in Limerick City. The key steps are set out in the following Action Plan.

10. Action Plan

10.1 A disciplined focus and dedicated effort is required over the next 12 – 18 months (2013-2015) to build momentum behind the delivery of Limerick 2030. The creation of the new City governance structure and the 2014 Irish City of Culture starts to give an impetus to this. The following are deemed to be the crucial next steps to enable this momentum to build:

1. Agree on the operating structure of Economic Development and Planning Directorate – secure consensus around the principles and objectives of the Economic and Spatial Plan from all relevant stakeholders. This will involve crucial dialogue with the IDA, EI and other stakeholders.
2. Establish the Limerick Unified Business Portal (working title) quickly and disseminate the message to generate momentum and signal to other stakeholders who are taking the lead on business across the City.
3. Create and resource a team to lead Broadband roll-out for rapid delivery and secure agreement that this is a quick win project.
4. Build broad stakeholder support for the Economic and Spatial Plan through its advocacy in public forums and in engagement with Central Government. Establish a basis for the city to speak as one voice: public, business and voluntary sector.
5. Put in place the structures to allow the public, business and voluntary sectors to work together in the delivery process: a joined up collective approach.
6. Progress the Plan through the statutory planning process to secure its planning status. This will involve completion of the necessary strategy requirements around Strategic Environment Assessment, Appropriate Assessment and consultation.
7. Start the process of assisting the private sector in the creation of a City Centre management regime and prepare the ground for the creation of a Business Improvement District (BID) approach for the core shopping area.
8. Commence the necessary studies and assessment to allow the revision of the transport strategy for the City building upon the smarter travel principles and seeking to ensure an integrated public transport, vehicular and cycling/pedestrian strategy.

9. A prerequisite is to give priority to pedestrians and cyclists in line with the proposals in Limerick 2030. Focus on enabling the delivery of the Great Streets programme, the Limerick Quays programme and the delivery of an integrated signing strategy for the City Centre.
10. Initiate the feasibility work on the Limerick Centre: An Iconic Culture/Arts and Tourism Facility for Limerick enabling a coherent business plan to be agreed as a basis for seeking funding from Central Government and Europe (including JESSICA funding).
11. Linked with action no. 12 agree a joined up tourism strategy for Limerick, including Fáilte Ireland and the private sector.
12. Limerick 2030 identifies several key development projects including the Opera Site, Arthur's Quay, Bishop's Quay, Colbert Station and Cruises Street. Not all of these can be initiated at the same time, nor can they all be delivered over the same period. However work can be commenced to prepare these schemes for implantation. This preparation should take the form of preparing detailed developments briefs for each site. More detail is provided on the two absolute priorities: the Opera Site and Arthur's Quay, however it may be the case that the private sector find other schemes already discussed equally attractive and therefore it is appropriate that briefs are prepared for all sites to facilitate investment and delivery. If a JESSICA fund mechanism is to be utilised it would be appropriate to have a range of schemes which could benefit from funding support especially smaller, more manageable schemes which meet the qualification criteria.
13. In this context detailed discussions are required with NAMA to ascertain what assets might be brought into play to either enable the delivery of the core projects outlined in Limerick 2030 or which would help deliver the wider vision and objectives.
14. In addition, a dialogue needs to be developed across the public sector by Limerick City and County Councils to engage in issues around the potential future of the Garda Station, investment in Colbert Station, delivery of a new bus terminal, the future requirements of the Revenue Commissioners (occupying Sarsfield House) and future intentions around property held by the Office of Public Works, etc.
15. Limerick City and County Councils also need to develop a land and property asset strategy: with a comprehensive review of all land and property held by the new local authority, taking into account land that may become available from Shannon Development, etc.

16. This assessment would take the form of a 'triage', identifying land or property required for ongoing operational needs, land or property available for disposal on the basis that it has no long term value, and, thirdly land and property which could be utilised to enable the delivery of Limerick 2030 either by making a direct contribution to a particular development or by being made available to help establish a delivery vehicle: for example an LABV.
17. In parallel with the public sector land and property assets strategy review Limerick City and County Councils need to put in place a land assembly strategy identifying sights and land not under its control but which would be deemed necessary to deliver the key projects within Limerick 2030. This land assembly strategy will be defined by the detailed work on individual projects and will inform an important back drop with the adoption of a compulsory purchase strategy to enable project delivery.
18. One area where it may be necessary to acquire further property is in the Georgian Quarter. Detailed feasibility work is required to prepare a business plan for implementing a pilot scheme as defined in the Plan. The ensuing business plan would be used to put in place the necessary public funding and/or tax incentive regime.
19. The Opera Site is a delivery priority and therefore requires specific attention. This delivery strategy will need it to draw from a number of the actions outlined above. The Plan advocates a business-led solution to the Site with a move away from previous retail-led solutions. This requires a number of specific steps as follows:
 - a. Agree the proposition of a re-location of the Revenue Commissioners from Sarsfield House into a new building on the Opera Site funded and delivered by the private sector on an agreed long lease basis.
 - b. Establish the proposition and business plan for the scheme which will prove acceptable to Central Government and which will also appeal to the private sector. In preparing this business proposition include the need to include a portion of this site (5,000-10,000 sqm) to be available for letting by the IDA to potential FDI business(es).
 - c. Progress discussions with the UL/LIT.
 - d. Put in place a land assembly strategy/CPO strategy to bring other properties into the Site – for example at the junction of Patrick Street/Charlotte's Quay.

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- e. Put in place a detailed design brief for the site - defining public access, public realm, height, density, conservation, etc. requirements.
 - f. Formulate the concept of the Technology and Innovation Hub and produce a business plan for its delivery and management. This will involve detailed discussions with UL and LIT and agreement will need to be reached on how the facility is delivered and to be managed.
 - g. Prepare a Site development brief/proposition and business plan to secure public investment and to guide the appointment of a private sector/partners to deliver the agreed scheme.
20. Also as an early priority, parallel work is required on the Arthur's Quay Shopping Centre redevelopment and adjoining land including Arthur's Quay Park, the Tourist Information Centre and the road infrastructure.
- a. The first step in the delivery of the Arthur's Quay Shopping Centre redevelopment is the formulation of a detailed scheme for the Site by the public sector and Limerick City and County Councils as a basis for engaging with the existing owners.
 - b. A detailed assessment is required of the road infrastructure, in the context of the wider transport strategy for the City to define the appropriate road management regime and road alignment in the vicinity of Arthur's Quay to enable the definition of available development plots, appropriate car parking, access and servicing arrangements.
 - c. This assessment should be aligned with a detailed public realm solution which seeks to incorporate a new City Square as advocated in this Plan and a reformed Arthur's Quay Park as part of a wider Riverwalk project.
 - d. In parallel with this wider discussion/feasibility and technical work, a detailed dialogue is required with Marks and Spencer as one of the few known anchor shopping requirements in the market place not already located in Limerick. Thereby ensuring a proposition that fully meets their requirements subject to commercial consideration.
 - e. Establish a land assembly/compulsory purchase strategy for this area to enable delivery once an agreed scheme has been put in place, this will involve consolidating the public sector land interests, acquiring smaller private interests and ensuring clean title. It is an important pre-requisite for discussions on delivery with the private sector.

- f. A public-private approach is required to ensure the delivery of Arthur's Quay, facilitated by Limerick City and County Councils. Consideration is required as to whether the City should seek to deliver with the current owners of the Shopping Centre possibly in partnership with other private investors, and/or whether the local authority should lead a wider campaign to find a private sector partner to bring the scheme forward in its entirety. This gives rise to significant commercial and legal considerations.

10.2 This section of delivery, including the next steps/action is a guide to start the full delivery process. Once delivery is commenced other factors will come forward influencing sequencing and on the choreography of the delivery process.

11. Conclusions and Recommendations

- 11.1 For the first time this report provides Limerick with an integrated Economic and Spatial Plan to guide its full renaissance into the 21st Century. Limerick 2030 seeks to take full advantage of the proposed local government restructuring, the existing Regeneration programmes and the assets of both the City and County. It seeks to capitalise on Limerick's attributes, whilst tackling head-on the challenges and barriers to economic growth and investment.
- 11.2 The Economic Strategy within the Plan sets out a clear route map for revitalising Limerick's economy and thereby the wider economy of the County and Mid-West Region. This Strategy has three building blocks – 'strengthening the knowledge economy', 'creating an outstanding business environment' and 'creating the conditions for long-term growth'.
- 11.3 It seeks to firstly derive much more value from the established sectors in Limerick – most notably ICT/Electronics, High Tech/Manufacturing, Logistics and Distribution and High Value Food and Drink; secondly, to capture a bigger share of growth in Life Sciences, Business and Professional Services, Tourism, Sport and Leisure; thirdly, to secure more investment in the emerging Low Carbon Sectors, and finally to capture new enterprise growth in the Cultural, Creative and Digital Media sectors.
- 11.4 Spatially, the economic response needs to take full advantage of all of the City and County's locational and economic strengths. This means enhancing the business role of Limerick City Centre not only in performing a leading economic function in its own right, but also by meeting the wider 'quality of life' expectations of investors, business leaders, employers and employees alike.
- 11.5 However this central economic and 'quality of life' function of the City Centre needs to be complemented by support for economic development investment at key locations across the County, most notably in Newcastle West, Askeaton, Killmallock and Shannon-Foynes.
- 11.6 The key to success is to establish a co-ordinated and structured approach to economic development and business support led by Limerick City and County Councils but with the full support, of the three higher education institutions, the local business community and central bodies, including IDA, Enterprise Ireland and Fáilte Ireland.
- 11.7 To complement the Economic Strategy the Spatial Plan places a specific focus on the renaissance of Limerick City Centre, seeking to develop its role as a place of creativity,

culture and consumption and make it the 'shop window' for Limerick and the Mid West as a whole. The response comprises a series of complementary initiatives and interventions to transform the City Centre, bringing wide economic benefit, but also supporting the existing Regeneration programmes targeting the deprived communities surrounding the Centre City.

- 11.8 The plan focuses initially on getting the fundamentals of a successful City Centre in place around business, shopping and living opportunities. It seeks to deliver better infrastructure and public realm to make Limerick City Centre a 'comfortable' and appealing place.
- 11.9 The spatial plan for the City Centre embraces seven transformational projects to complement bespoke intervention around improving the City Centre's shopping, business and residential offer, and its public realm and infrastructure.
- 11.10 This is an integrated plan – the success of each initiative depends upon the successful implementation of the others, for example an improved shopping offer is a pre-requisite to the attraction of new businesses, tourists, etc.
- 11.11 Success however will require a co-ordinated response with a unitary vision, organisation and implementation led by Limerick City and County Councils.
- 11.12 To help in bringing units and a clear sense of purpose the Economic and Spatial Plan is supported by a new 'place branding proposition' for Limerick as a whole. The 'place/brand propositions' for Limerick is based on the model of a central idea with a series of associated themes which together ensure a consistency of message about the City.
- 11.13 The central strategic, motivational and statement of intent of Authentic-Innovative-Progressive has been coined to encapsulate the message about what Limerick stands for. The four supporting themes of 'Enterprise and Knowledge', 'Attractive and Historic', 'Green and Sustainable', and 'Creative and Vibrant' will inform all messaging about Limerick.
- 11.14 Success over a 15 year plus time frame will see the creation of about 12,000 FTE jobs in total, as many as 5,000 of these in the City Centre; the redevelopment of key parts of the City Centre – Arthur's Quay, the Opera Site and the Waterfront for example, to provide shops, business space and homes, as well as an enhanced higher education presence; further business development investment in key County locations – Shannon-Foynes, Newcastle West, Kilmallock, Askeaton, etc, an enhanced City Centre environment overall with a more

pedestrian friendly outlook; and a successful economic and social integration of the City Centre with the surrounding Regeneration Areas.

11.15 But setting the plan is only the start to achieving this success. Progress has already been made through the plan making process in aligning public sector, business and voluntary sector interests. This emerging unification is establishing a platform for continued joint working through the delivery process – led by the new local authority structure.

11.16 Whilst local government will take the lead in driving delivery in working with the private sector and voluntary communities, support is required from Central Government in addition to the ongoing Regeneration programmes and the 2014 National City and Culture initiative. Aside from overall endorsement of Limerick 2030. This support should comprise a number of elements:

- Support, including funding support for new City Centre, higher education teaching facilities;
- Support, through Enterprise Ireland for a new seed and venture capital programme - €50m fund;
- Support for the creation of new Technology and Innovation Hub in the City Centre, including potential funding contribution (€5m);
- Support for a public sector office anchor to kickstart the City Centre office market – potentially relocating the Revenue Commissioners from Sarsfield House to anchor a new office scheme in the Opera Site;
- Support for the creation of a new City Knowledge and Technology Park and Medical Village – potential funding enabling infrastructure (€5-10m);
- Support for the creation of 'Best in Class Broadband' in the City, building upon recent investments by Limerick City and County Councils and Shannon Development (€5m);
- Support in building a stronger Airport at Shannon to include securing US Cargo and other FDA pre-clearance facilities for both Irish and European originating freight;
- Support for the Limerick Cultural Centre project on the Waterfront – a new destination/iconic cultural/arts facility, including potential funding support (€10m);
- Support for further investment in the City Centre transport infrastructure and public realm (including the Great Streets Programme and creation of a new City Square) (€20m);

- Support for improvements to Colbert Station and the creation of a new public Transport Interchange (€15m);
- The creation of three inter-related tax incentive regimes focused on the City Centre core, the Georgian Quarter to encourage conversion and City Centre living and in defined parts of the Regeneration Areas to support enterprise and job creation; and to
- Pursue the creation of a JESSICA Fund programme with EU and European investment to provide support for the Limerick 2030 programme as a whole.

11.17 Limerick 2030 is a medium to long term renaissance programme which requires a systematic, structured, co-ordinated and collective response from Central Government, local government and the private sector working together. Limerick City and County Councils will need to lead the way and drive delivery in a proactive response.

11.18 Whilst a long term perspective is required to address structural failings, early interventions which focus as much on demonstrating a supportive and engaging attitude to investment and change will be important in galvanising private sector and community enthusiasm and support. In this regard a number of steps need to be implemented immediately in order to give momentum and focus to the delivery of this plan, namely:-

- The establishment of a high-level economic group to drive strategic elements of the Plan;
- The preparation of a detailed master-plan for the development of the Opera Site;
- The preparation of a detailed master-plan for the Arthur's Quay Area;
- The preparation of City Centre Transport and Public Realm strategies;
- The preparation of strategic development and marketing plans to encourage enterprise development on Shannon Development owned lands in County Limerick;
- The creation of an Innovation Hub to help to recapture Limerick's reputation for innovation and creativity; and
- The establishment of a dedicated Marketing Company to position and market Limerick.

The vision set out in this Plan is ambitious in its intent and in its scale. However, with the proper support and commitment from a coalition of stakeholders, it is realistic and it is deliverable.

Limerick is a special place - with a unique history, heritage and culture. Its people are resourceful and proud. The challenges faced today will be overcome. The implementation of this Plan will help to deliver a brighter future for all.

