MID WEST AREA STRATEGIC PLAN 2012-2030

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Planning,
Land Use and
Transportation
Strategy

Technical supporting appendices to this report are available from Limerick City & County Council at www.mwasp.ie

CONTENTS

ABBREVIATION OF TERMS

BRT	Bus Rapid Transit
CAT	Clare Accessible Transport
CSO	Census Statistics Office
DAA	Dublin Airport Authority
DM	Do Minimum
DoECLG	Department of the Environment, Community & Local Government
DoT	Department of Transport, Tourism and Sport
DS	Do Something
EI	Enterprise Ireland
FTE	Full Time Equivalent
GDI	Gateway Development Indices
GDP	Gross Domestic Product
GIS	Geographic Information Systems
GVA	Gross Value Added
HEI	Higher Education Institutes
HWY	Highway
ICT	Information and Communications Technology
IDA	Industrial Development Agency
LIT	Limerick Institute of Technology
LRT	Light Rail Transit
MWASP	Mid-West Area Strategic Plan
MWRA	Mid-West Regional Authority
NDP	National Development Plan
NRA	National Roads Authority
NSR	National Secondary Roads
NSS	National Spatial Strategy
NTLP	The North Tipperary LEADER Partnership
OECD	Organisation for Economic Co-operation and Development
Pass Hr	Passenger Hours
Pass Km	Passenger Kilometres
PoWCAR	Place of Work Census of Anonymised Records
PT	Public Transport
QBC	Quality Bus Corridor
R&D	Research & Development
RPGs	Regional Planning Guidelines
SEA	Strategic Environmental Assessment
SEO	Strategic Environmental Objective
SFPC	Shannon Foynes Port Company
SWOT	Strengths, Weaknesses, Opportunities & Threats
UL	University of Limerick

Agency supported employment accounts for approximately 50% of employment in the Castletroy, Plassey/Annacotty area.

PwC Estimates based on IDA, EI, 2009

FOREWORD

The Mid-West Area Strategic Plan (MWASP) has been developed to contribute to the policy framework which will guide the physical and spatial development of the region to 2030. Stakeholders in the Mid-West Region in 2013 continue to tackle the economic challenges which have had a significant impact in terms of increased unemployment, incomplete infrastructure and a weak central core in Limerick City. It is important that balanced growth continues to be planned for in a coherent structured and holistic manner and that the ever-increasing complexity of dealing with the region's issues is facilitated by increasingly focused and detailed decision-making frameworks. This is critical in order that future growth is focussed on securing successful social, economic, physical and cultural outcomes for the citizens of the Mid-West Region.

MWASP arises from the integration of an evidence-based economic, spatial and transportation planning assessment with engagement from a broad range of stakeholders throughout the Mid-West Region. The Strategic Environmental Assessment which was completed to inform the plan-making process, will ensure that the protection of the region's natural environment and heritage assets has been fully integrated into the decision making regarding the Plan.

Throughout the preparation of MWASP consultation and engagement with stakeholders including the general public, representatives of industry, key transport companies, the academic sector, elected representatives and technical advisors will help to ensure that the strategic plan is relevant to all citizens and will contribute to economic recovery in the Mid-West Region.

MWASP will help to provide strategic direction for important planning issues in the region, including revitalisation of Limerick City, effective implementation of the Regional Planning Guidelines, development of enterprise and employment, and delivery of infrastructural requirements. With the effective implementation of MWASP, existing transport problems in Limerick City and the Mid-West Region can be tackled and the proposals contained herein support more sustainable land-use and development. Long term dependence on the private car is not sustainable and MWASP identifies the transport infrastructure needed to encourage a shift from this mode of transport while still achieving regeneration in Limerick City and economic recovery in the Region.

The effective collaborative effort directed by the Project Steering Group involving staff from Clare County Council, North Tipperary County Council, Limerick City Council, Limerick County Council as well the Mid-West Regional Authority, Department of the Environment Community and Local Government and the Department of Transport, Sports and Tourism was a particularly notable feature of the process of developing this strategic plan.

We look forward to MWASP being recognised as having been a decisive element in the shaping of a more sustainable future for Limerick City and the Mid-West Region.

Cllr Ger Darcy
Mid-West Regional Authority Cathaoirleach
Bealtaine, 2013

EXECUTIVE SUMMARY

The Reason

The management of land-use and infrastructure provision in Ireland is implemented through the statutory Planning and Development system which incorporates Regional Planning Guidelines and City, County and Local Development Plans.

In order to facilitate and inform the implementation of the statutory processes, the constituent Planning Authorities of the Mid-West Region (Clare County Council, Limerick City and County Councils and North Tipperary County Council) and the Mid-West Regional Authority have developed a non-statutory, 20-year, integrated land-use and transport strategy for the region. This will provide an evidence base which can inform transport and planning policy and infrastructure investment decisions in the Region to 2030.

The overall aim of the "Mid-West Area Strategic Plan" (MWASP) incorporating the "Planning, Land Use and Transportation Strategy" is to provide a framework to help guide decision making with regard to the physical and spatial development of the Region to 2030, and to promote balanced growth throughout the region to achieve the maximum social, economic, health and cultural benefits for all its citizens.

MWASP has been prepared using published socio-economic data and the information and insight gathered during the roadside surveys and public consultation which formed part of the process of preparing the Plan.

The fundamentals of the strategy are aligned to the National Spatial Strategy 2002-2020, are closely linked to the Mid-West Regional Planning Guidelines 2010-2022 and reflect national "Smarter Travel" objectives.

The Context

Major and rapid social and economic changes are being experienced both globally and nationally. Ireland prospered from an export boom in the 1990s and early 2000s and experienced a period of rapid economic growth from 1995-2007. Strong growth in the domestic economy was driven by spending on housing (construction) and consumption (retail) which, combined, led to unsustainable drivers of growth.

There has, of course, been a dramatic reversal of fortunes since 2007 with a GDP contraction of 14% and national unemployment levels at 14.8% by 2012. Unemployment in the Mid West region is slightly greater than the national average at 16%.

The 2011 Census figures confirm the on-going population growth of the Mid-West Region, which indicates strong growth in the key regional economic nodes of Ennis, Newcastle West and Nenagh, while recording a second concurrent decline of the population of Limerick City.

The land use and transport recommendations contained in the Plan are based on population growth for the region which emanate from the published regional population targets provided by the Department of Environment, Community and Local Government up until 2022. From 2022 until 2030, a lesser growth has been assumed to bring the regional population to 500,000.

The National Recovery Plan (2011 – 2014) provides a blue print for a return to sustainable growth in the Irish economy. In particular it:

- sets out the measures that will be taken to restore order to the public finances.
- identifies the areas of economic activity which will provide growth and employment for the future recovery of the region.
- specifies the reforms the Government will need to implement to accelerate growth in those key sectors identified in the plan.

MWASP is designed to cater for a regional population of approximately 500,000 in twenty years' time. Should this population target not be achieved within this timeframe, the delivery of the strategy will take place over a longer period of time until the target population is reached, though the MWASP principles and objectives will remain unchanged.

The Objectives

- Prioritise investment in the region, through a fusion of land use and transportation policies within the context of a defined settlement hierarchy as provided in the Regional Planning Guidelines;

- Strengthen the role of Limerick City and its Environs (Metropolitan city) as the core economic driver for the Region;

- Strengthen the Limerick/Shannon Gateway and Ennis (Hub Town) in terms of population growth,and as complementary centres for both employment and population growth, with a better balance between the two;

- Promote balanced regional development throughout the region through the development of well-defined hierarchies of settlements that envisages stronger roles for Nenagh, Newcastle West, Thurles, and to a lesser extent Roscrea, which will support the development of a series of rural economic nodes, and their immediate hinterland;

- Deliver the required national road (Atlantic Corridor) infrastructure to connect the region with Waterford, Galway and Cork;

- Revise the public transport system through future investment to achieve a more sustainable, accessible, competitive and socially inclusive region;

- Identify and promote investment in key infrastructural projects identified to serve the needs of the region including new roads and improvements to the National Secondary and Regional road network, rail, air, port, infrastructure and water services. Such proposals to include an equitable distribution of resources throughout the region;

- Clarify the identity and future role of Shannon Airport in the context of the development of a national aviation policy;

- Support opportunities that the Shannon Estuary Integrated Framework Plan can sustainably deliver, through optimising the deep water berthage opportunities and the infrastructural, commercial and recreational resources which prevail in the estuary and its surrounds;

- Change the way Limerick is portrayed and viewed, to promote the prioritisation of support for the region by development agencies and to improve the cost competitiveness of the region;

- Acknowledge that the Mid West region has a strong rural population of c. 54% of the region, with a strong agricultural sector. The Region requires the development of a strong urban core with rural development nodes, good access to markets and amenities ,which in turn will facilitate the growth of the rural hinterland, and lead to a positive impact on rural development and, settlement, with economic and job creation opportunities; and

- Assist in the streamlining of the regional corporate governance structure to provide a better platform for the Limerick Metropolitan Area to achieve its potential (underway);

- Provide education, re-training, up-skilling and research opportunities.

The MWASP sets out a series of economic, land-use and transport recommendations including a proposed transportation investment programme, a public transport feasibility report, spatial and economic strategies and recommendations to achieve balanced regional development and an enhanced quality of life for the citizens of the Mid West region.

The Strategy proposes that in order for the region to develop its economic strength, it needs to generate export-led growth in goods and services, promote innovation through research and development and secure long-term sustainability and growth through the following:

> A commitment to education, research and development;
> Delivering on its track record for overseas Foreign Direct Investment (FDI);
> Promoting international competitiveness that is beginning to improve (decrease in salaries and rents, increase in availability of skilled labour); and
> Retaining the corporate tax regime that is a crucial driver for FDI.

The development of the Strategy has been informed by a Strategic Environmental Assessment (SEA) process. The parallel SEA process has been undertaken to ensure that the proposed MWASP strategies that are implemented will not have a significant negative effect on the receiving environment over the lifetime of the Plan.

The Conclusion

The MWASP incorporates a bold and innovative approach to addressing existing transport problems in the City and Region, which in turn will provide a modern and efficient public transport solution necessary for the future development of the region. The investment proposals in this strategic plan are intended to support more sustainable land-use and development with sustainable populations in a number of identified urban centres.

The transport implementation plan proposes to reduce dependence on the private car and create the reliable transport infrastructure needed to encourage regeneration in the city and the economic growth of the region through the attraction of increased business activity. The MWASP will inform reviews of the statutory RPGs and the City and County Development Plans and will have as its focus:

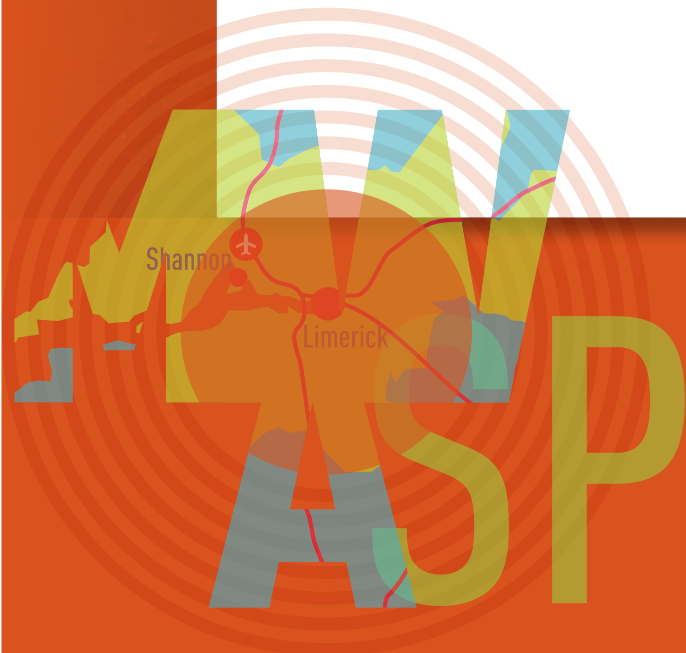
Focus of MWASP

> *The revitalisation of Limerick City and its Environs;*
> *Measures to deliver population growth, infrastructure and job creation in specific areas targeted in the RPGs;*
> *Balanced regional development to promote sustainable urban and rural development;*
> *Development of enterprise and employment; and*
> *The identification and remediation of infrastructural deficits.*

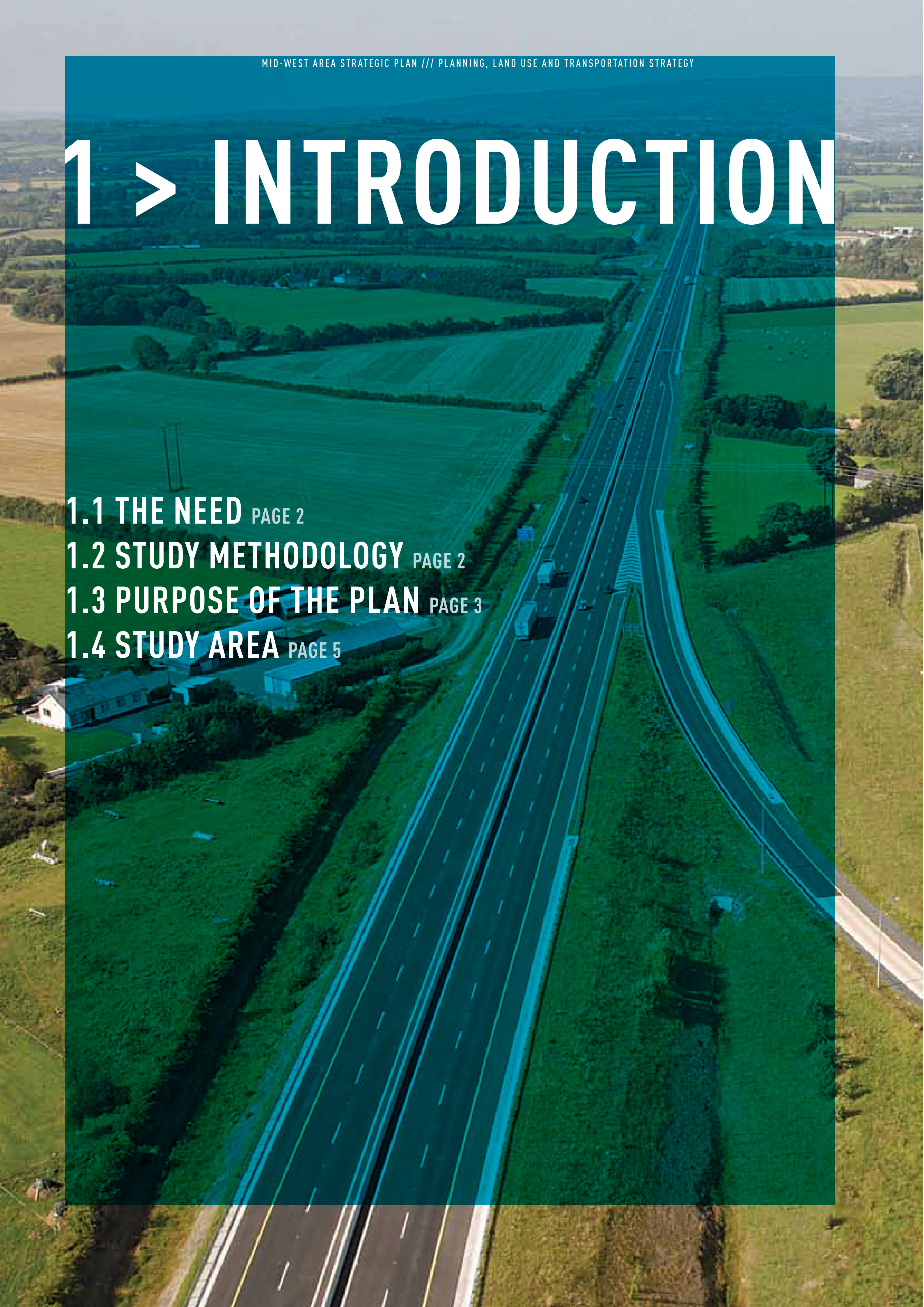
The Vision

This strategy has been informed by the adopted future vision for the Region which is stated as follows:

"The Mid-West Region and Limerick City as its capital, will realise its potential as a gateway region both nationally and internationally. The future of the region will be based on sustainable, economic, social equity and environmental drivers, which together will deliver an enhanced quality of life."



The implementation of the recommendations outlined in this strategic report will help to develop a successful region with a strong City at its core, which will in turn drive the region's economy, improve the City's image and deliver a better quality of life for all.



1 > INTRODUCTION

The purpose of the plan is not intended to deliver an end-state but rather a step in shaping the future of the region.

The Project has engaged with the general public and sought the views of a wide range of stakeholders to establish their attitudes and aid in the development of the MWASP.

While it has been determined that there is a necessity for an evidence based strategic document to direct the region on planning, land use and transportation related matters the MWASP report will only be the first step in a long process that will support change.

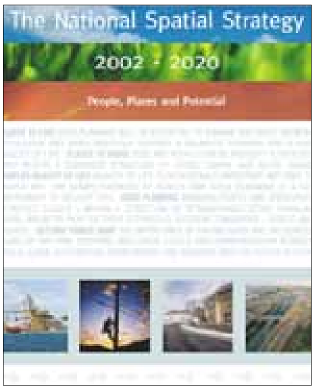
1 > INTRODUCTION

1.1 > THE NEED

In responding to the strong economic growth experienced in Ireland from the late 1990's, the National Spatial Strategy (NSS) recognised the need to promote more sustainable patterns of development. While the economic context has changed, the spatial planning goal of the NSS remains relevant: The NSS promotes sustainable development, emphasising the need to integrate land use and transport, particularly public transport. Within this context, Mott MacDonald Ireland, in association with sub-consultants PricewaterhouseCoopers and McGill Planning, were commissioned by Limerick City Council to develop a strategic land use and transportation plan for the Mid-West region. This Plan, hereafter referred to as the Mid-West Area Strategic Plan (MWASP), has been informed by the NSS, the National Development Plan (NDP) and the Regional Planning Guidelines for the Mid-West Region (RPGs). The Plan provides a land use and transportation planning framework to guide the sustainable spatial development of the region to 2030.

"Ireland needs to renew, consolidate and develop its existing cities, towns and villages – i.e. keeping them as physically compact and public transport friendly as possible and minimising urban sprawl, while also achieving a high quality of design in new developments and refurbishment. Urban land needs to be used carefully, sensitively and efficiently – with the aim of reducing dereliction and under-utilisation. Where green-field development is necessary it should take place through the logical extension of existing cities, towns and villages."

The National Spatial Strategy 2002 - 2020



Limerick City Council, in conjunction with the other Mid-West Local Authorities of Clare County Council, Limerick County Council and North Tipperary County Council led the preparation of the Plan. The project is supported by a number of key partners including the Mid-West Regional Authority (MWRA), the Department of the Environment, Community & Local Government (DoECLG) and the Department of Transport, Tourism and Sport (DoT).

1.2 > STUDY METHODOLOGY

The overall study methodology for this strategy is centred on an evidence-based approach that incorporates quantitative and qualitative baseline and projected analysis. Economic, spatial and transportation planning assessment has been undertaken including analysis of national, regional and local planning policy and guidance, and an assessment of the future development of the region. Key data sets have been used throughout the report with particular application of the Census Statistics Office (CSO) Census 2006, CSO Place of Work Census of Anonymised Records (PoWCAR) 2006, 2011 Census Data and Department of the Environment, Community and Local Government National Population Projections and Regional Population Targets 2010 to 2022. Strategic spatial planning, transport and economic forecasting techniques analysis have been applied in the preparation of this study.

An integral element of the study methodology has been the engagement and consultation with key stakeholders with important community engagement which focused on not only the social dimension but also economic, environmental and other important considerations. Effectively, the proposed strategy is to serve the region so, it is reasonable to expect that community input should be carefully considered.

Therefore, this study has actively encouraged the in-depth exchange of views and information, giving rise to joint analysis and permitting a more considered decision-making/recommendation approach. When a stakeholder is, or could potentially be, materially affected by a project, it is imperative that these persons are kept fully informed and are encouraged to participate in a balanced and transparent consultation process.

The project team has sought the views of a wide range of key stakeholders over the study period to establish their attitudes to the development of the entire strategy. The methods of consultation included face-to-face meetings, telephones conversations and email correspondence. Consultation has been extensively conducted with the project working group for this project, namely, the local authorities Transportation and Planning staff from within the study area. The project has also been guided by the project Steering Committee, consisting of the local authorities Directors of Services for Transport and Planning, DoT & DoECLG representatives, CEO of MWRA and chaired by Limerick City Manager.

The findings of the stakeholder and elected members consultation have been carefully considered and incorporated into the overall study analysis and preparation of this strategy.

An additional significant input into the development of MWASP is the Strategic Environmental Assessment (SEA) process. SEA is a formal, systematic evaluation of the likely significant environmental effects of implementing the plan prior to a decision being made to adopt the plan.

The Project has engaged with the general public and sought the views of a wide range of stakeholders to establish their attitudes and aid in the development of the MWASP.

The Environmental Report is the central document in the SEA process and its main purpose is to identify, describe and evaluate the likely significant effects on the environment as a result of the implementation of the plan and strategies contained within. In addition the Environmental Report assesses feasible alternative strategy elements and outlines proposed mitigation measures and a monitoring programme. The Environmental Report is developed in parallel with the Plan to ensure that the Plan is developed and modified where required to ensure that any potential environmental effects as identified during the SEA process are mitigated.

1.3 > PURPOSE OF THE PLAN

The overall aim of the Strategic Plan is to put in place a policy framework to help guide the physical and spatial development of the region to 2030. The Plan is not intended to present an 'end-state', but instead a substantial step in shaping a more sustainable future for the Mid-West of Ireland, with Limerick City at its core. The strategic direction of the region must ensure balanced growth and achieve maximum social, economic, physical and cultural advantage for its citizens.

1 > AN INTRODUCTION

The Strategic Plan is developed to further supplement and support, through evidence based research, the planning framework hierarchy of the National Spatial Strategy, Mid-West Regional Planning Guidelines, County/City Development Plans and Local Area Plans.

The Plan provides strategic direction for the important planning issues which must be addressed in the Region including:

- Revitalisation of Limerick City and balanced sustainable regional development
- Measures to deliver population growth in specific areas targeted in RPGs
- Development of Enterprise and Employment
- Infrastructural deficits

The purpose of the plan is not intended to deliver an end-state but rather a step in shaping the future of the region.

1.3.1 > STRATEGY OUTPUT

While it has been determined that there is a necessity for an evidence based strategic document to direct the region on planning, land use and transportation related matters the MWASP report will only be the first step in a long process that will support change. The output of the Strategy will be the first substantial step in a rolling strategy that will help shape the future of the Mid-West Region. The Strategy will help launch the region in a more sustainable direction with the fundamentals engrained in evidence based research. By implementing the recommendations a continuous process for the next twenty years will be put in place that will help develop the economic and planning aspects of the Mid-West Region, supported by strong transport measures to ensure accessibility and connectivity. Meaningful consultation with stakeholders and elected members is an essential platform that has brought forward the process with an agreed shared vision.

The study includes the commitment from the government to undertake a *"feasibility study….. into Luas-style light rail transit systems in Cork, Galway, Limerick and Waterford"*. The Mid-West local authorities have broadened the scope of the commitment outlined in the national "Programme for Government 2007 – 2012" to include the undertaking of a feasibility study into the feasibility of future public transport options including Bus Rapid Transit (BRT) and also look at national and international connectivity for the region as part of the strategy development.

The work done will develop a Strategy for the region to help it compete nationally and internationally. The output will integrate the region's key drivers in the Spatial Strategy hubs, while embracing the sustainable philosophy, and planning for both current and future needs.

The study objective to develop a strategic plan for the region will ensure the balanced growth of the Study Area, thereby allowing the region to reach its fullest potential in terms of achieving maximum social, economic, physical and cultural advantage for its citizens.

The parallel SEA process has been undertaken to ensure that the proposed MWASP strategies that are implemented will not have a significant negative effect on the receiving environment over the lifetime of the plan. The Strategy outcome must be used to guide and inform the preparation of Development Plans over the next 20 years, and policies in those plans should reflect the recommendations of the Strategy.

While it has been determined that there is a necessity for an evidence based strategic document to direct the region on planning, land use and transportation related matters the MWASP report will only be the first step in a long process that will support change.

1.4 > STUDY AREA

The MWASP applies to the entire Mid-West Region which comprises the local authority administrative areas of Limerick City and Clare, Limerick and North Tipperary County Council's including their respective statutory councils contained therein. The region is bounded by the West, Midland, South East and South West regions.

The population figure of the Mid-West from the 2011 Census is estimated to be 379,327 persons which are approximately 8% of the population of the state. The Metropolitan Area of Limerick City[1], with approximately 91,000 persons or one-quarter of the region's population, is the largest settlement and is located at the centre of the region. The next largest settlements[2] are Ennis (c.25,000), Shannon (c.10,000), Nenagh (c.8,000), Thurles (c.8,000), Newcastle West (c.5,000) and Roscrea (c.5,000)

Figure 1: Study Area

The region has traditionally had a strong economic base in manufacturing, industry and transport. This has developed around the significant numbers of multi-national companies attracted to the Mid-West region. The public sector, tourism and agriculture, information technology and education continue to employ a significant number of people in the Mid-West.

The region is relatively well served by transportation connections through Shannon Airport and the port facilities on the Shannon Estuary. The main road and rail routes into the region are from Galway, Cork, Waterford and Dublin. The largest settlements within the region, highlighted above, are well integrated with the national primary road network. Limerick, Ennis, Nenagh, Thurles and Roscrea are on the national rail network. Despite significant improvements in transport infrastructure in recent years, some areas near the periphery of the region are not well connected to the transport network, particularly in respect of the public transport network.

1 The Metropolitan Area is the City and contiguous built up area located in parts of Limerick and Clare Counties.
2 2006 Census Data

2 > STUDY CONTEXT

While the Mid-West has many fine traits the region still needs to address a number of physical, economic and social challenges.

Shannon Airport is one of the most important pieces of public infrastructure in the region.

The Ennis model of public transport interchange should be replicated at a number of other regional centres, over the lifetime of the strategy as promotion of alternative sustainable transport options are increased.

2 > STUDY CONTEXT

While the Mid-West has many fine traits the region still needs to address a number of physical, economic and social challenges.

2.1 > THE MID-WEST TODAY

While the Region has a number of strengths and unique characteristics, it has suffered as a consequence of the economic downturn, like all other regions in Ireland. **Key strengths** include:

- Shannon Airport,
- Shannon Estuary and the Ports e.g. Foynes and Moneypoint Ports,
- improved rail and road infrastructure over the last number of years,
- lower cost of living than Dublin;
- a number of key state planning & development organisations exclusive to the region;
- relatively well serviced in terms of access to Higher Education;
- good presence in ICT (information and communications technology
- green energy generation potential
- skilled workforce,
- medical technologies,
- internationally traded services over last 10 years,
- choice of business parks; and
- major tourist & recreational facilities – Burren, Lough Derg and Cliffs of Moher.

While the region has many fine traits it also faces **many challenges**, in trying to achieve a sustainable growth pattern and must address issues such as:

- improving connectivity by road, rail and air to other parts of the country,
- expanding the number and range of employment opportunities,
- declining passengers numbers at Shannon Airport,
- declining number of overseas tourists visiting the Region,
- increasing the number of people with third level education,
- intensification of the settlement pattern in order to make public transport more viable to connect the trip patterns in a meaningful way,
- strengthening Limerick City as the core of the region, which is weak and threatened.

2.2 > STUDY OBJECTIVES

The overall objective of the Strategy is to establish an integrated, flexible and reliable planning, land-use & transportation strategy for the region until 2030. The objective is that the Mid-West Area Strategic Plan will establish a framework to specifically:

- Identify a strategic vision that will inform investment in social, physical, educational and economic sectors.
- Strengthen and enhance the functionality of the Limerick / Shannon Gateway and Ennis Hub, as identified in the NSS 2002 – 2020.
- Inform the current and future Statutory Plans and policies.
- Identify the regions strategic planning, land use and transportation requirements for the next 20 years.

- Aid in identifying and securing National Government funding.

2.3 > KEY REGIONAL ISSUES

To inform the identification of key issues and challenges facing the Mid-West region today, an assessment of demographic and land use change has been undertaken which focuses on patterns of change during the 2002 to 2006 census period, with some comparison to the 1996 to 2002 period.

Within the Mid-West, larger urban centres and rural areas with good road access to larger urban centres have experienced strong and consistent population growth. This resulted in consistent population increase within and around the central area of the region. Whilst there was a steady centralisation of the population into larger urban centres, rural areas overall continued to increase in population. However, the level of population increase among rural areas varied considerably and the overall rate of increase slowed. Generally, places which were more remote from the central area and with the weakest settlement structure declined in population. It is clear therefore, that larger urban centres were the drivers of population growth.

Metropolitan Limerick (i.e. the built up area of the city that goes beyond the administrative area of Limerick City Council) experienced significant development and strong population increase over the same period. However, the population of the administrative area of Limerick City decreased, largely as a result of out-migration to the suburbs and elsewhere. The levels of social deprivation evident in the Regeneration Areas influenced this pattern significantly. Conversely, the population and level of development in the Limerick Suburbs increased dramatically over the period[3].

These patterns of change also had an impact at the regional and national levels. CSO data shows that the Mid-West Region experienced the lowest rate of population growth (11.4%) across the Irish regions between 2002 and 2011. The state experienced a 17% growth in population in this time period .

From the 2011 Preliminary Census Report it is positive that the population of the Mid-West Region continues to grow, since 2006, but most importantly the region needs to start sustaining its proportion of the national population. The Region's share of the national population is now 8.3%[4].

The past has shown that larger urban centres were the drivers of population growth in the region. In general, the more remote locations of the region with the weakest settlement structure declined in population.

Beyond the population and the settlement pattern challenges that have emerged there are also a number of further economic related challenges that are evident. These challenges, as of 2011, are outlined in the following sections to this chapter.

2.3.1 > EMPLOYMENT

Between 2004 and 2007 total employment in the Region increased by 11,500 and between 2007 and 2011 the total employment decreased by approximately 20,300[5].The region also continues to struggle with the unemployment for those aged under 25 at c.17% and the region also has one of the highest rates of long-term unemployed in the country (almost 10%). In line with national trends the national average was 8.4% in 2011[6]. The long-term unemployment rate has increased by 7.7% points between 2007 and 2011.

There were over 40,000 on the live register in June 2010 an increase of 6.7% on 2009 figures[7]. These numbers have been accentuated by the closure of manufacturing facilities in the region and ancillary services impacted upon following this loss of jobs. In 2009, the unemployment rate was 13.8% in the Mid-West Region compared to 12.7% nationally. In 2011, this figure was still rising and reached 16.8% which was compared to 14.8% nationally[8].

Unemployment rate in the Mid-West Region has been consistently higher than the national rate since 2007, with the gap widening.

CSO, QNHS, ILO status

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3 Source: CSO Census 2002 and Census 2011 Preliminary Results
4 Source: CSO Census 2002 and Census 2011 Preliminary Results
5 Source: CSO: Quarterly National Household Survey (QNHS), ILO status, Q3, 2007 & 20112005 & 2009
6 Source: CSO Q3 2011, Special Data Run, Long term unemployment rate, Q3 2011
7 Source: CSO, Live Register Additional Tables, June 2010
It should be noted that the Live Register is not designed to measure unemployment. It includes part-time workers (those who work up to three days a week), seasonal and casual workers entitled to Jobseekers Benefit or Allowance.

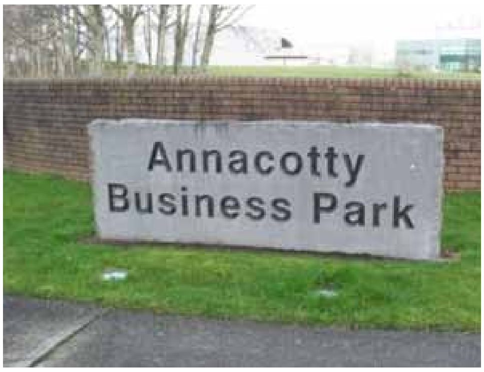
Table 2.1: Total numbers employed and unemployed, Mid-West Region and State (Q3, 2002-2011).

MID-WEST REGION						STATE	
YEAR	IN EMPLOYMENT	UNEMPLOYED	IN LABOUR FORCE	UNEMPLOYMENT RATE	PARTICIPATION RATE	UNEMPLOYMENT RATE	PARTICIPATION RATE
2002	154,700	5,900	160,600	3.7%	59.8%	4.4%	60.6%
2003	156,000	9,100	165,100	5.5%	60.9%	4.9%	60.8%
2004	160,800	9,300	170,100	5.5%	61.8%	4.4%	61.6%
2005	171,800	8,900	180,700	4.9%	64.0%	4.6%	63.0%
2006	172,800	10,100	182,900	5.5%	63.9%	4.7%	63.9%
2007	172,400	10,100	182,500	5.5%	62.5%	4.6%	64.6%
2008	167,100	14,900	182,000	8.2%	61.3%	7.0%	64.2%
2009	153,600	24,500	178,100	13.8%	60.7%	12.7%	62.5%
2010	151,100	29,600	180,700	16.4%	61.2%	13.9%	61.2%
2011	152,300	30,800	183,800	16.8%	62.6%	14.8%	60.4%

However, there was a small decrease (-3.4%) in the number on the live register between April 2011 and 2012. There are currently 37,207 on the live register[9].

In 2009, the unemployment rate was 13.8% in the Region compared to 12.7% nationally. In 2010, this figure was still rising at 16.3% compared to 13.6% nationally[10]. The unemployment rate has been consistently higher and the labour force participation rate consistently lower in the Mid-West Region, than the national rates since 2007.

There has been a significant loss of jobs in the Region including a significant number of manufacturing jobs and subsequent indirect job losses in Limerick.



The labour force participation rate (i.e. those at work, looking for first regular job and unemployed) rose between Q2 2010 and Q2 2011 (60.7% to 63%) though dipped slightly in Q3 2011. Since Q4 2010, the labour force participation rate has been above the national average rate.

Agency supported (IDA, Enterprise Ireland and Shannon Development) companies are crucial as drivers of economic growth. These companies play a leading role in improving Ireland's versatility and technological advancement, giving the country a greater competitive edge in international markets. From 2001-2011 the Region has experienced the highest decrease (-27.6%) in agency supported Full Time Equivalent (FTE) jobs. The average decline in agency supported FTEs in the State was -10%. There has been a decrease in jobs across a wide range of sectors. However, the rate of decline has begun to decrease. In 2011, the number of agency supported jobs fell by less than 1% to approximately 23,200 (FTEs)[11].

8 Source: CSO, Quarterly National Household Survey, ILO status Q3 2009 and Q3 2011
9 Source: CSO, Live Register, April 2012
10 Source: CSO, Quarterly National Household Survey, ILO status Q3 2009 and Q2 2010
11 Source: Forfás,
12 Source: Forfás, Annual Employment Survey 2010, Appendix

2.3.2 > ECONOMIC MAKE-UP OF THE REGION

The employment make-up has also changed considerably since 2007.

The numbers employed in certain sectors have grown considerably since 2007 and are performing better than the national figures. In 2011 there were:

- 11,600 (7.6% of total) employed in **accommodation and food service**, an increase of 17% since 2007, this compares to a national decrease of -17%,
- 5,400 (3.6% of total) employed in **financial, insurance and real estate activities**, an increase of 29% since 2007, this compares to a national decrease of -7%,
- 7,700 (5.1% of total) employed in **professional, scientific and technical activities**, an increase of 7% since 2007, this compares to a national decrease of -16%.
- 9,300 (6.1% of total) employed in **public administration and defence, compulsory social security**, an increase of 19% since 2007, compared to a national decrease of -6%; and
- 17,500 (11.5% of total) employed in **human health and social work activities**, an increase of 19% since 2007, 10 % points above the national average.

There has been a significant decrease in the numbers employed in other sectors between 2007 and 2011. In 2011 there was:

- 26,200 (17% of total) employed in **Industry**, a decrease of 5,100 jobs (-16%) since 2007. This was less than the national average (-24%). This sector has experienced significant job losses since the peak of 2005 (-7,300), however there has been an increase of 700 jobs since 2009,
- 8,400 (5.5% of total) employed in **agriculture, forestry and fishing**, a decrease of 4,100 jobs since 2007 (-33%). The drop in people employed in the Region was greater than the national average (-26%),

Table 2.2: Total numbers employed per sector Mid-West Region and State (2004, 2007 and 2011)

	SECTORS	2004		2007		2011		MID-WEST REGION CHANGES 2007-2011		
								MW	MW	STATE
		NOS.	% OF TOTAL	NOS.	% OF TOTAL	NOS.	% OF TOTAL	NOS.	%	%
A.	Agriculture, forestry and fishing	14,400	9.0%	12,500	7.3%	8,400	5.5%	-4,100	-33%	-26%
B-E.	Industry	30,500	19.0%	31,300	18.2%	26,200	17.2%	-5,100	-16%	-24%
F.	Construction	17,400	10.8%	22,600	13.1%	8,800	5.8%	-13,800	-61%	-60%
G.	Wholesale & Retail trade; Repair of motor vehicles and motorcycles	23,900	14.9%	25,300	14.7%	20,100	13.2%	-5,200	-21%	-13%
H.	Transportation and Storage	8,400	5.2%	7,300	4.2%	8,200	5.4%	900	12%	3%
I.	Accommodation & food service activities	9,200	5.7%	9,900	5.7%	11,600	7.6%	1,700	17%	-17%
J.	Information & communication	4,000	2.5%	4,200	2.4%	4,200	2.8%	0	0%	11%
K-L.	Financial, insurance and real estate activities	4,200	2.6%	4,200	2.4%	5,400	3.6%	1,200	29%	-7%
M.	Professional, scientific and technical activities	5,500	3.4%	7,200	4.2%	7,700	5.1%	500	7%	-16%
N.	Administrative and support service activities	5,100	3.2%	6,400	3.7%	5,500	3.6%	-900	-14%	-20%
O.	Public administration and defence; compulsory social security	5,300	3.3%	7,800	4.5%	9,300	6.1%	1,500	19%	-6%
P.	Education	10,200	6.3%	12,000	7.0%	11,100	7.3%	-900	-8%	3%
Q.	Human health and social work activities	13,900	8.6%	14,700	8.5%	17,500	11.5%	2,800	19%	9%
R-U.	Other NACE activities	8,800	5.5%	6,900	4.0%	8,100	5.3%	1,200	17%	-5%
	Total	**160,800**	**100.0%**	**172,400**	**99.9%**	**152,100**	**100.0%**	**-20,300**	**-12%**	**-12%**

A number of sectors in the Region have grown over the past number of years including:
• Accommodation and food,
• Financial, insurance and real estate activities,
• Public administration and defence,
• Human health and social work activities.

- 8,800 (5.8% of total) employed in **construction,** a decrease of 13,800 jobs (-61%) since 2007, on a par with the State average,
- 20,100 (13.2% of total) employed in **the wholesale & retail trade** a decrease 5,200 (-21%) jobs since 2007. The drop in people employed in the Region was greater than the national average (-13%).

In 2011, the key differences in the make-up of the Region from national figures were the numbers employed in:

- **industry** was 4.3% points higher. The Region is more reliant on industry than the national level, making it more vulnerable to current global and national challenges. However the proportion of those employed in industry as a percentage of total in the Region has decreased,
- **accommodation and food activities** was 1.3% points higher,
- **wholesale & retail trade; repair of motor vehicles and motorcycles** was 1.6% points lower,
- **financial, insurance and real estate activities** was 1.9% points lower. The national figure was slightly distorted by Dublin and the Mid East which had 9.7% and 6.5% employed in this sector respectively.

Table 2.3: % of people employed per sector in the Mid-West Region Vs the State (2011)

SECTORS		MID-WEST REGION	STATE	DIFFERENCE IN % POINTS
A.	Agriculture, forestry and fishing	5.5%	4.6%	1.00%
B-E.	Industry	17.2%	12.9%	4.30%
F.	Construction	5.8%	6.0%	-0.20%
G.	Wholesale & Retail trade; Repair of motor vehicles and motorcycles	13.2%	14.8%	-1.60%
H.	Transportation and Storage	5.4%	5.3%	0.10%
I.	Accommodation & food service activities	7.6%	6.3%	1.30%
J.	Information & communication	2.8%	4.1%	-1.30%
K-L.	Financial, insurance and real estate activities	3.6%	5.4%	-1.90%
M.	Professional, scientific and technical activities	5.1%	5.3%	-0.20%
N.	Administrative and support service activities	3.6%	3.7%	0.00%
O.	Public administration and defence; compulsory social security	6.1%	5.6%	0.50%
P.	Education	7.3%	7.6%	-0.30%
Q.	Human health and social work activities	11.5%	13.2%	-1.70%
R-U.	Other NACE activities	5.3%	5.3%	0.00%
Total		**100.0%**	**100.0%**	**0.00%**

***Source:** CSO, QNHS, ILO, Q3, 2011*

With an embargo on growth of staffing levels in the public sector the future growth in the employment market will largely be dependent on the private sector.

2.3.3 > PUBLIC SECTOR REFORM

Employment (FTEs) in the public sector (including commercial state-sponsored bodies) in Ireland was 331,000 in 2004, it peaked in 2008 at 361,000 and in 2011 it decreased to 340,200[13], a decrease of 20,000 between 2008 and 2011.

The reduction in public sector employment is likely to decrease further over the coming years, reflecting a drive to reduce public sector costs. Therefore, the country will be highly dependent on the private sector to create employment.

Public sector employment as a percentage of total employment in the Mid-West Region has been consistently less than the national average since 2004[14].

With an embargo on growth of staffing levels in the public sector the future growth in the employment market will largely be dependent on the private sector.

The DoECLG have produced population targets for the Region to 2022. These targets have been adopted in Regional Planning Guidelines[15] and inform future employment requirements.

As public sectors jobs are not likely to grow dramatically in the near future, the majority of new jobs will have to be created by the private sector (agency supported and other domestically traded services)

In order for the area to be sustainable, a substantial number of new jobs will have to be created to accommodate the population growth and strengthen the economic base of the region. If the required number of jobs, to support the local population are not created, a high percentage of the population will end up commuting longer distances to work, becoming unemployed or emigrating. See Table 6.1 Estimated increase in employment numbers in the Mid-West Region (2010 – 2030).

2.3.4 > COST COMPETITIVENESS

There is a predominance of employment provided by multinational companies in many important internationally traded sectors of the local economy in the region, therefore the region is very vulnerable to competition and displacement from lower cost countries. The manufacturing and industry sector has been subject to increasing levels of competition from lower cost countries over the past decade. The computer and electronic products (manufacturing) sector is the most important internationally traded sector in terms of employment. Employment in this sector is largely accounted for by a small number of large multinational firms; closure of one plant could have another huge impact with the major downstream effects for sub-suppliers and associated service industries. The cost base in the Region and Ireland as a whole has reduced over the last few years e.g. The cost of construction related activity continues to drop along with rent and property prices.

- Weekly salary costs decreased by 11.6% between Q4 2008 and Q4 2011[16].
- Residential rent decreased by -25% in Limerick City since peak (Q4 2007)[17].
- By the end of 2011 tender prices were back to where they were thirteen years ago[18].

However, there is a need to further reduce the costs in order to compete with countries with a lower costs base. The NCC report 'Ireland's Competitiveness Challenge 2011' states:

The cost of construction related activity continues to drop along with rent and property prices.

13 Source: IPA, Administration Year Book and Diary, 2012 Department of Finance
14 Source: QNHS, Q3 2004 & 2011 includes sectors O,P and Q. It should be noted this assumes that all the employees in Q (human health and social work activities sector) are public sector employees, which is not the case.
15 Source: Mid-West Regional Authority. Regional Planning Guidelines, June 2010
16 Source: The Daft.ie Rental Report, Q1 2012
17 Source: Society of Chartered Surveyors Ireland, The Irish Construction Industry in 2012
18 Source; CSO, Census 2006

2 > STUDY CONTEXT

The proportion of people with a 3rd level degree or higher is (26.5%) slightly under the state average at 29%.

- **Commercial property costs** - despite reductions, commercial property costs in Ireland remain relatively expensive compared to other locations.
- **Energy** - a number of domestic cost drivers (including the cost of supporting renewable energy, peat generation and grid upgrades) which add to customers' final electricity bill need to be revised or indeed phased out. The Government should be focused on lowering costs and risks in order to encourage the market to invest in the renewable energy sector.
- **Commercial rates** - the mechanism used to calculate commercial rates needs to be transformed to reflect current market conditions, including a broad based reduction in the annual rate of valuation (AVR) and an expedited revaluation exercise. Minister for Environment, Community & Local Government, Phil Hogan stated the merger between Limerick City and County Council will have an immediate positive impact on business, with commercial rates being revised downwards to the current lower county rates.

2.3.5 > EDUCATION, SKILLS AND RESEARCH AND DEVELOPMENT

The Region, with nearly 20,000 full-time 3rd level students, has seen a rise in those staying on in education over recent years, although this needs to continue and be supported by central government. The proportion of people with a 3rd level degree or higher is low (26.5%) compared to other Regions such as Dublin (35.6%), the Mid-East (30.8%) and the South-West (28.6%)[19].

Ireland's education system is ranked[20] 8th from 57 countries surveyed for meeting the needs of a competitive economy and 9th in terms of knowledge transfer between companies and universities.

Retention of 3rd level graduates is also notably lower than other regions and has been mainly due to the proliferation of jobs in Dublin and the Mid East[21]. However, the census 2002 – 2006 shows an increase of 4.1% in 3rd level participation, indicating that the region is moving towards overtaking the state average. Furthermore data released by the

19 Source: CSO, Census 2006
20 The IMD World Competitiveness Yearbook 2009
21 Source: Mid-West Task Force Interim Report, July 2009
22 Source: CSO, Census 2006

Higher Education Authority in 2010 found that the Mid-West Region is maintaining a high proportion of those with PhD and Masters Research qualifications.

There is a higher concentration of people with qualifications in the areas of engineering, manufacturing and construction in the Mid-West Region[22].

The numbers with degrees is likely lower because of the profile of employment in the area, including a strong farming and agriculture industry. If the profile of employment is moved away from manufacturing and construction then the numbers of graduates employed will also be likely to rise. Of significant note is that the University of Limerick outperformed other 3rd level Irish institutions by scoring 5-stars in the "Employability" category of the recently published 2011 QS World University Rankings, clearly showing the strength of the students graduating.

The Region has attracted a relatively lower amount of research funding than other comparable Regions and is underperforming in terms of innovation capacity and performance[23].

2.3.6 > ACCESS AND TRANSPORT INFRASTRUCTURE ISSUES

Shannon Airport is at the heart of the region and plays a significant role in international connectivity and increasing prosperity to the region, including tourism and exports. Connectivity and access to the Airport are critical and ensuring rapid, timely and cost

THE SUNDAY TIMES IRELAND 2010 UNIVERSITY GUIDE RANKINGS[24]
RESEARCH FUNDING

University	Research Funding (€M)
University College Dublin	106.4
Trinity College Dublin	89.7
University College Cork	85.3
National University of Ireland Galway	66.1
Dublin City University	48.06
University of Limerick	46.6
National University of Ireland Maynooth	25.9

Degree Programmes offered are not necessarily geared towards the future changing needs of the region and the region is underperforming in terms of securing research funding.

effective transport connectivity to the Airport from all parts of the region is paramount. The opening of the Limerick Tunnel, completion of the M7 motorway and large sections of the M18 to Gort have made access to the region and its International Airport more time and cost efficient. Public transport frequency to Shannon Airport and along the corridor, from Limerick to Galway provided by Bus Éireann, is also relatively high. Given current patron numbers, the existing public transport offering and upgraded road infrastructure there does not appear to be an immediate need for a rail link to the Airport but the corridor should be protected into the future and reviewed on a regular basis.

Shannon Airport is one of the most important pieces of public infrastructure in the region.

In the current environment international connectivity, via Shannon Airport, has seen a decrease in passenger numbers. In 2009, almost 2.8 million passengers passed through the Airport, a decline of 12% on the previous year[25]. This fall continues with a similarly poor performance at the Airport for the full 12 months of 2010 when 1,755,900 passengers used the Airport, 37.2 per cent down on the 2,794,563 passengers that used the facility in 2009.

23 Source: Forfás, Regional Competitiveness Agenda, Realising Potential, Volume II
24 The Sunday Times, 19 September 2010
25 Source: www.shannonairport.com

2 > STUDY CONTEXT

In January 2011, 92,000 passengers passed through the Airport, a 37.4 per cent drop on the same month in 2010. Shannon saw falls in January 2011 in London traffic (-17 per cent), UK provincial (-48 per cent), European traffic (-67 per cent) and transit traffic (-33 per cent). Passenger numbers at Shannon Airport have continued to fall sharply in 2011 and are now approaching levels not seen since the early 1990s, according to Dublin Airport Authority (DAA) figures.

Shannon has experienced a 52 per cent drop since its peak in 2006, when 3,639,046 passengers used the airport, and 2010 passenger numbers were similar to 1996 levels. If the rate of decline experienced in January continues throughout 2011 then the Airport will handle in the region of 1.6 million passengers for the year.

Given that passenger figures continue to fall at Shannon Airport a strategy must be developed to support the sustainable future direction and role of the airport in terms of passenger and commercial activity.

The road connectivity to Shannon Airport, passenger pre-clearance to USA and reduction in financial support to other regional airports, gives great opportunity to Shannon Airport to grow and serve the west of Ireland as the International Airport. The strategic importance of establishing Shannon as a gateway for USA bound freight with pre-clearance is a must for the region.

However, the Airport has achieved significant successes in 2010 by securing Aer Lingus Regional's newly established services to Manchester, Birmingham, Glasgow and Bristol and also the commencement in December 2010 of a new Aer Lingus Paris-Charles de Gaulle (CDG) service. The Airport remains well serviced with transatlantic services, with their scheduled USA services (Boston, JFK and Newark); seven times that of Belfast.

There has also been much regional hype about the possibility of the role of Shannon as a far greater international logistics centre or similar. Given the proliferation of employment and logistics in the region it would be a suitable role that could be fulfilled and possibly connected to freight pre-clearance into the USA.

Shannon Airport holds great opportunity to operate as an international freight logistics hub and with the assistance of freight pre-clearance into the USA could become the primary air freight hub in Europe.

In the absence of an agreed National Aviation Policy for Ireland it is necessary for this strategy to inform National Policy, and underscore that the key roles that Shannon Airport can play in the National context are the following;

- Continue to serve as an international access point for the region and West of Ireland
- Be a key driver in influencing business interests wishing to locate in Ireland by offering a broad choice of international routes and connections
- Offer a range of routes for the tourism market

- Develop further as an internationally recognised aviation cargo facility
- Reduce its cost base and working the assets under its control, including the maximising of the 2,000 acre land-bank under its control
- Return to a facility that caters for over 2.5M passengers per year in the next five years

Sea Port activity in the region is strong and Shannon Foynes is the third largest port in Ireland, by tonnage. Given that the region straddles the Shannon Estuary the connectivity of landside transport infrastructure that currently facilitates the port is poor, the further west from Limerick city one travels. This includes the N69 road corridor and the Foynes rail corridor on the south of the estuary and N67, N68, R473 & R486 on the northern bank. If the region and country are to develop the employment opportunities that may arise from potential along this natural deep waterway, it is necessary to develop appropriate road and rail access strategies to meet this potential.

Such access Strategy must be developed with a view to the long term employment future associated with the Estuary. The infrastructure plans must match the prospective industry demands that may be facilitated within the landside footprint of the estuary corridor. However, the land-use and intensity of development type, including potential geographical locations, must first be drafted. It may be possible to develop a stream of potential options that could be filtered to the most viable, depending on land use scenarios. At this stage potential investors require clarity as to what infrastructure may be developed in terms of supporting development along the Shannon Estuary, rather than the current uninformed situation.

The National Road Network has seen the development and opening in 2010 of the final sections of M7 motorway linking the region to Dublin by motorway and significant progress on the M18 Galway corridor with the opening of the Limerick Tunnel and Gort to Crusheen motorway. These additions make a marked change to connectivity between Limerick/ Shannon as the Gateway and Ennis as the hub to the other Gateways of Dublin and Galway. The opening of the M18 also completes part of the strategic Atlantic Corridor; however it is necessary to complete the M18 link to Galway via Gort.

The uncertainty surrounding the real development potential of state lands adjacent to the Shannon Estuary and infrastructure to serve them can at least be addressed in terms of undertaking preliminary designs for the infrastructure upgrades that would allow better access to the already designated employment lands.

2 > STUDY CONTEXT

The national road network within the Mid-West is crucial in a number of aspects. It provides connectivity between the regions Gateway, Limerick-Shannon, and other adjoining gateways, improves connectivity and increases competitiveness. The strategic road network is a major factor in;

- facilitating the activities of business and social activity,
- integrating the region's resources and those of adjoining regions,
- providing access to Shannon International Airport,
- access to the Inter-City and Regional Rail network,
- providing efficient and competitive road access to the Region's ports and in linking the region with the Euroports in Cork and Rosslare.

Although a marked change has occurred through the implementation of some significant infrastructure pieces there are many links that still require upgrading to give a meaningful link. At the highest level of importance is the delivery of similar types of connectivity to the other Gateway's of Cork and Waterford and completion of the link to Galway.

The completion of the M7 motorway from Limerick to Dublin, opening of the Shannon Tunnel and continuation of the M18 to Crusheen has released Limerick of heavy traffic and made the region far more accessible and competitive.

Inner Relief Roads for towns and villages within the region should be supported where solutions for land acquisition and development can be identified subject to normal needs analysis.

There is a requirement to accelerate and improve the road links to other key cities including N20 Cork, some of which is currently progressing through design stage, and N24 Waterford routes. Access to these locations is poor and possibly deters movement due to the lack of quality infrastructure. The lack of consistent and reliable connectivity to Cork and Waterford may impact further on the economic corridors now that connectivity has been strengthened between the region, Dublin and Galway, via the M7 & M18 respectively. Although greatly beneficial these new motorways have led to greater challenges in trying to promote the public transport alternative. With the implementation of better connectivity to Cork and Waterford similar public transport versus road network challenges will occur too.

The progression of the development of the M21 is fundamental to the region as it provides a key access to the proposed growth area of Newcastle West and to the large urban conurbations of Tralee, Killarney and also to the tourism industry of the region. The scheme must be progressed and reviewed in the context of connections to the N69. In the absence of full alignment upgrades consideration must be immediately given to localised bypasses for the towns of Newcastle West and Abbeyfeale.

The National Secondary Roads (NSR) Needs Study, published by the National Roads Authority in March 2011, identifies an optimal future NSR network, which offers value for money. In the region this includes improvements to the N52, N62, N67, N68, N69, N75 and N85. The role and importance of these roads, given the high car usage in the study area, cannot be underestimated in strategic importance. They form the transport veins of the region and connect many of the more rural economic nodes to the larger towns, Hub and Gateway. It is paramount that possible linkages between the N69 and M21, with progress on the upgrading of the M21 being recently put in abeyance, need to be reviewed and added to the NSR needs priority list.

The Rail Network in the region is significant but the local passenger and national freight activity return from the available infrastructure is rather disappointing. As also highlighted in the Mid-West Regional Planning Guidelines there is a structural deficit at Limerick Junction where a direct rail journey between Cork and Limerick is currently not physically possible. Links from Limerick to Cork and Waterford could be

High-speed rail links will be an inevitable requirement of the future transport provision and corridor studies should be undertaken now in order to protect the routes and streamline future investments.

further improved and there is a limited direct rail service from Limerick to Dublin, with passengers having to change at Limerick Junction to make journeys, particularly in the off-peak periods.

Aside from Ennis – Limerick Junction and Dublin-Cork the condition of the commuter **route infrastructure is variable**, with a number of speed restrictions in place, **on the Limerick to Ballybrophy route in particular**. The condition of the line as far as Nenagh means that this commuter route is low speed. The lines on other routes on which services have been discontinued have been retained such as the branch lines to Newcastle West and Foynes.

The rail links to Limerick via Nenagh and Ballybrophy are greatly underutilised and are in need of investment. Options that could be considered to increase usage include re-directing some service variations via Nenagh to/from Dublin/Limerick and vice-versa. This would have further benefit in releasing

Additional studies in respect of potential commuter rail stops and lines should be undertaken to better inform future land-use growth concentrations around potential and planned transport nodes.

capacity on the busy Dublin Cork rail line. Options should be investigated further to try and secure a more sustainable public transport link utilising the rail corridor. The Strategic Rail Review does not anticipate nor promote investment into this corridor at the expense of other routes. However, there is a new opportunity to examine the potential for increased line usage, in anticipation of future population growth being assigned to Nenagh and Roscrea that may not have been considered before.

In the future the provision of a high-speed rail link between cities may become a pre-requisite and is already in progress across many countries around the world, including in the UK. The promotion of high-speed rail travel does not appear to have made the Irish transport agenda to date.

Given the likely future requirements for high-speed rail links some corridor studies should be undertaken to identify potential routes that will deliver high-speed rail links between Limerick/Shannon/Ennis to Dublin, Cork, Waterford and Galway.

The lack of adequate transport interchange facilities at key settlement locations needs to be addressed in order to offer production of seamless travel options and a more enticing product to the commuter.

Additional studies in respect of potential commuter rail stops and lines should be undertaken to better inform future land-use growth concentrations around potential and planned transport nodes.

Subject to commercial developments along the estuary and also potential mining activity in the region the commercial freight corridor to/from Foynes should be reviewed at least every five years.

Interchange locations are few and many are removed from the core of urban centres. Limerick Colbert (Limerick City) is located a short walking distance from the City Centre with the coach station adjacent. The facilities are dated, but functional, and could be enhanced to provide a better interchange environment and layout that supports adequate taxi, cycle and pedestrian provision in and on approach to the facilities.

Further consideration should be given to the premium location for bus/bus (local, regional and intercity) interchange to serve the city and region with new routings to connect the rail node. The current metropolitan area bus/bus interchange facilities in the City Centre are spread over a number of streets and have no central hub or evident information point.

Limerick Junction is remote but plays one of the most significant roles in relation to rail/rail interchange. Although the car parking facilities were recently expanded, a more formalised park and ride facility could be provided to increase car/rail commuter numbers to Limerick and other regional centres. Consideration of direct routing from Limerick to Cork and associated infrastructure to accommodate same should be considered, especially in the absence of an upgraded road access.

Ennis station has benefited from works to improve the passenger experience including weather protection, a waiting room and information systems; 11 trains operate to Limerick Monday to Saturday. The co-location of the bus station, taxi rank and car park provide a range of onward journey opportunities and the facilities are attractive. Thurles is one of the busiest interchange stations in the country and is served with a good frequency of services. Unfortunately it is not integrated with the bus facilities and cycle provision at the station is poor. An investment to establish a clearer and more structured layout, as per Ennis, should be provided. The station has more than enough parking provision, on both sides of the track, and has recently benefited from some facial upgrades, including signage and new footbridge. The availability of onward information and local directional signage to the station are poor.

Nenagh station is staffed despite low levels of use, particularly for commuter journeys to Limerick city. Its proximity to the town is of great importance and future development should consider this as an opportunity. The facilities are a reflection of the current usage. Some of the smaller stations on this corridor (Nenagh-Limerick), like Birdhill & Roscrea are well tended with a few cars parked, suggesting that the stations are useful for people travelling from more remote origins. In many of the regions towns the most simplistic of bus facilities exist which do little to entice, promote or support the role of the bus in the region and community. Parking is abundant in most towns and consideration

Much opportunity lies in the city and hinterland to affect transport behavioural change. To support this various levels of focused and concentrated investment into infrastructure along with soft measures will be required over a prolonged period to affect real change in travel habits.

should be given to how local parking and bus usage can be connected to promote small informal park and ride interchanges between car and bus.

Smarter Travel alternatives, by way of dedicated infrastructure in the urban structures, are limited. Where provided the networks are piecemeal and do not necessarily link large trip attractors and generators. Smarter travel alternatives in the hinterland do benefit from some rural transport initiatives but the marketing, service limitations, funding restraints and interconnectivity of the services needs to be addressed.

Car availability outside the city environment is higher than the national average.

Much opportunity lies in the hinterland and smaller towns (>5,000 pop.) to provide, possibly through pilot schemes, small smarter travel projects that could demonstrate how low cost investments into shelters, seating, information displays and car/cycle parking can make a change to the regional mode share.

Greater opportunity for change can also be realised in the major towns (c.<5,000 pop.) where targeted investment, marketing, work place travel planning and school programmes could establish a measurable and longer term behavioural change toward travel, as currently very little exists to promote the government policy of Smarter Travel.

2.3.7 > LIMERICK CITY

The Gateway Development Indices (GDI) Report, Southern & Eastern Regional Assemblies[26] found that Limerick Zone 1 (the City Centre) scores low on a number of domains including: population domain – relatively poor population growth; affluence

domain and social domains – high crime and low community participation indicators. The index found that growth in Limerick's City Centre is lagging behind that of the wider catchment area, and that Limerick City GDI status is longstanding and the City Centre has actually been falling over time compared to the national average.

In relation to the retail sector, Limerick City Centre's share of retail floor space has fallen by more than half since 2002; the recent trend has been for consumers to visit other retail areas on the outskirts of the City. Retail footfall and sales densities are significantly lower in Limerick City Centre than that of comparable cities i.e. Galway[27].

There are a number of substantial and potentially sustainable sites in Limerick City Centre that could be utilised for high end job creation and mixed-use.

2.3.8 > GOVERNANCE STRUCTURE

The collaborative approach which has resulted in the adoption of the Regional Planning Guidelines in 2010 should continue. This will allow for greater co-ordination of plans and policies for the benefit of the entire region. The recently enacted planning legislation will assist in this co-ordination objective.

Table 2.4: Car Ownership per Household (%)

AREA	NO CAR	1 CAR	2 CARS	3+ CARS
Limerick City	38	41	18	4
County Clare	15	38	37	9
North Tipperary	16	38	36	10
Limerick County	14	36	39	12
Mid-West	18	38	34	9
National	20	39	33	9

Source: CSO 2006.

Table 2.5: Journeys to Work by Bus (means of travel by usual residence for persons aged 15 years and over)

BUS USERS	COUNTY CLARE	LIMERICK CITY AND COUNTY	COUNTY TIPPERARY	MID-WEST TOTAL
Number of users	843	3222	766	4831
Per cent	1.7	4.1	1.2	2.5

Source: CSO 2006.

26 Source: Fitzpatrick Associates, Southern & Eastern Regional Authority, Preparation of Gateway Development Indices Report
27 Source: Colliers CRE, A Retail Strategy for the Mid-West Region, December 2009

2.4 > KEY PUBLIC TRANSPORTATION ISSUES

The region contains a variety of transport systems and services which neither individually nor as a system, provides an adequate transport network for the area. A key issue to be addressed is harmonising the service offering to provide a seamless transport system that serves the region.

2.4.1 > CAR

Car ownership is a key influence on the propensity to use public transport. Table 2.4 shows car ownership rates which reflect the dispersed residential locations. In particular are the low percentage without access to car and higher than average percentage with two cars. No bus network can address all travel needs and hence consolidating services is the best means of attracting users, particularly if interchange opportunities are established.

2.4.2 > BUS (REGIONAL)

The majority of services in the region are operated by Bus Éireann, the state-controlled operator of buses across the country. Whilst a regular service operates in the main urban areas, the rural and commuter services are sporadic with complex timetables that do not fully address main journey to work needs. This is largely evident in the regions mode split for journeys to work at 2.5% in 2006 Census, as shown in Table 2.5.

Census data indicates that the proportion and the number of journeys to work made by bus is relatively small, reflecting the largely rural travel patterns.

The proportion of journeys to school made by bus is much higher than that for journeys to work. For students aged between 13 and 18, between 33% and 28%, by county, of journeys in the region is made by bus/minibus/coach. It is evident that although children are used to travelling by bus, they do not become regular bus users subsequently. This is through a combination of home and work location, changing circumstances and personal preferences.

In Ennis, the narrow streets in the town centre preclude their use by buses but good walk and cycle links supported by signing to public transport stops would help to increase the public transport usage.

There is, however, a very strong public transport interchange provision and service offering in Ennis. The bus/coach station is again adjacent to the rail station, has a manned information point and space to support effective rail/bus, coach/bus and coach/taxi interchange. The disadvantage is that the facility is a few minutes' walk from the town centre and the facility would greatly benefit from some additional directional signage for all modes, including pedestrians and cyclists.

With bus providing only 2.5% of the trips to work in the region the Smarter Travel Policy of achieving 55% by Smarter Travel is a significant challenge for the region.

The new terminal facility at Shannon Airport has a capacity for 4.5 million annual users and extensive car parking is available to accommodate growth. However, the public transport service provision is unappealing, private car access and parking dominate over alternate more sustainable modes and the site layout adds to journey time.

Around 2,500 jobs are located at the airport; Shannon Free Zone employs around 6,500[28] (of which only 4% use buses) while the residential area of Shannon Town has a population of around 8,000. Therefore the local population, transient commuter and employment base make the locality a prime market for public transport, yet the current usage is poor. In the absence of a feasible rail link, public transport bus connections to the airport are provided by coach services.

28 www.shannonireland.com, Sept 2011, a Shannon Development supported website

However, the additional journey time for public transport commuter routes to access and egress from Shannon may make the choice of public transport over private vehicle a difficult service offer to sell, given the challenges the direct upgraded road access provided. At present a single bus trip is about one third the cost of a day's car hire at a little under €6.

In Nenagh, bus stop facilities are basic and are absorbed into the town centre activities. Provision should be aptly identifiable, clearly signed and informative of service provision. Similarly, the two bus stops in Roscrea do not stand out as a focus for local or inter-urban travel, a situation which is repeated throughout the region. In Thurles a similar public transport interchange provision similar to the rail station in Ennis could be made at the rail node. All of the region's major towns are of similar provision and public transport infrastructure provision is of poor quality and prominence.

The challenge from a public transport perspective is to make coach and bus services as attractive as car and work with the local employers to establish employment based travel plans, destination based travel plan for the Airport and an area wide travel plan that will encompass car sharing as an option. A community approach, through the business association, Airport or Chamber of Commerce, may work best.

There is a requirement to radically reform the way that bus travel is marketed as an alternative mode of transport to the people of Metropolitan Limerick.

2.4.3 > BUS (LIMERICK CITY)

The current network covers much of Limerick city but it is difficult for intending users to identify which services operate from which locations in the central area. The easy availability of such information is critical to making buses an attractive option and information should be clear at stops and on publicity material.

While some of the built-up area around Limerick City is relatively well provided for by bus, others have less choice. Currently, only two urban bus services, routes 302

and 305, operate across the City Centre both originating in the north-west. Other opportunities may exist to link routes and should be considered provided that reliability can be maintained through the central area. This can be assured by using priority measures which would create some efficiency savings.

The arrangements in Limerick city (and other boarding points) are somewhat confusing. Numerous layover and pick-up points exist with no apparent grouping of stops or services. In the central area, the presence of buses and coaches which lay over presents an untidy appearance. The facility at Colbert Station for rail/bus or coach/bus interchange requires upgrading and although planning permission has been granted for such no work has yet been undertaken. In the context of the strategy outcomes the scale of proposed investment here should be evaluated and reviewed in the context of identifying the premier location for bus/bus interchange.

The only bus priority measures currently in situ in Limerick County Council are on the R526 St Nessan's Road between Raheen Roundabout and Crescent Shopping Centre Roundabout and in Limerick City Council on, Ennis Road, Condell Road, Mulgrave Street, and William Street.

There is significant potential for reallocation of road space and enhanced urban design in Limerick City Centre, to complement the Limerick Orbital Route one-way traffic management arrangements implemented during 2010. A more radical approach to bus priority could be pursued by excluding general traffic from some streets and dedicating them to buses, cyclists and pedestrians; other traffic would be re-routed to parallel streets. The Public Transport Feasibility Study in the appendices refers to appropriate locations, based on a revised service schedule.

2.4.4 > PUBLIC TRANSPORT INFORMATION

Information on services, timetables and fares is difficult to obtain. Limited web site information is evident and for Limerick city, no single map shows all the routes[29]. This makes it difficult for intending users to identify the services that could meet their needs (with the result that they do not use them). Although a journey planner is available that includes fares, a real time bus information system on the web site does not include Limerick. At Shannon Airport, a number of coach services depart from stops close to the terminal building but facilities are basic. JJ Kavanagh operates regular coach services between Shannon Airport, Limerick City, Nenagh, Roscrea and Dublin Airport and real time updates are available via its web site[30].

However, it is understood that a number of developments are underway to address some of these deficiencies. The National Transport Authority is finalising the development of a National Journey Planner, which will cover the Mid-West Region. On-street Real Time Passenger Information (RTPI) is being rolled out to Limerick City during 2012 and web and smart phone apps will provide this information for most bus stops in the region by the end of 2012. New timetable and service information is also being introduced.

A central source of data on available travel options is required for the Mid-West Region.

2.4.5 > RURAL TRANSPORT

In rural areas the cost of providing conventional bus services can be prohibitively expensive due to low population densities and limited patronage. But the social inclusion and accessibility benefit is substantial. Rural communities are more reliant on private transport, with high levels of car ownership. However, for elderly or mobility impaired people and those on low incomes, access to private transport remains difficult and therefore rural bus services play a significant role in society.

The Government's 1999 White Paper on Rural Development acknowledged the economic and social impacts of inadequate rural transport. It articulated a vision for rural society with an overall long-term objective of maintaining vibrant communities in rural areas; the availability of transport is a critical element in achieving this objective. The programme has three schemes in the Mid-West, each operating as 'not-for-profit' companies:

29 www.buseireann.ie
30 www.jjkavanagh.ie

2 > STUDY CONTEXT

- **Clare Accessible Transport** (CAT) operates with Ennis as the principal hub with services to other service centres (e.g. Scarriff, Ennistymon, Kilrush, Gort).
- **North Tipperary Rural Transport** Programme The North Tipperary LEADER Partnership (NTLP) operates 31 routes in four main areas (Borrisokane, Thurles, Boherlahan and Kilcommon-Upperchurch) on a flexible basis.
- **Rural Bus (County Limerick and North Cork Transport Group Ltd)**[31] operates in six distinct areas of County Limerick and North Cork, over the following areas: Newcastle West, Rathkeale, Bruff, Castleconnell, Kilmallock and North Cork.

In overall terms, the rural transport provision needs to:

- widen its base of custom to become more sustainable,
- review becoming more integrated into the public transport system, through service integration, ticketing, information, smart card technology and pricing
- Routings need to be reviewed in order to facilitate transport interchange and localised facilities need to be upgraded to accommodate these interchanges.

But the core of social inclusion and accessibility elements of the service provision must not be lost either. Therefore demand responsive transport must remain fulfilling a key role, but possibly under a different model.

2.4.6 > RAIL

Census data, prior to opening of the Western Rail Corridor, indicates the number of rail users, as a proportion of total journeys to work, account for less than 0.5%. This figure is not likely to have grown significantly in terms of overall percentage of trips to work, with the inclusion of the Western Rail Corridor.

Even taking into account the longer distance journeys made by rail for other purposes (leisure etc), the number of rail users is low.

This implies that any investment would be difficult to justify unless substantial mode shift can be achieved.

In terms of the low proportion of commuter using rail as a means of travel to work the current rail system is primarily serving Inter-City movements and furthermore the planning policy has not made sufficient effort to intensify development around these transport nodes. Commuter times by alternate modes to key destinations from outer urban and rural conurbations are also far more competitive by car than the equivalent by rail or a combination of rail and local bus.

The current inter-urban rail service to/from Dublin is highly successful in many aspects but the service offering from the Mid-West Region to Cork fails to operate with any great market penetration. The localised urban commuter provision serving the region is not delivering sustainable quantum of patronage, with the exception of Ennis-Limerick. This means that the current level of service is costly to operate. And, without major changes, decline rather than enhancement of service provision is likely with the network being retained primarily to provide inter-urban links.

In order to attract more users additional investment and incentives are required. There are many options available, starting with low cost soft measures.

Although the region has a significant length of rail corridor the numbers using it (passenger and freight) are relatively low.

31 www.ruralbus.com

Aside from the commuter rail services there is also a significant distance of specific rail infrastructure which is generally associated with freight activity. These routes include the Limerick Foynes line which has capacity for freight / commuter services, and the Colbert / Cement works line. Both the Limerick Foynes and Limerick Cement works lines have a dual potential to service freight needs and reduce traffic on the substandard N69 and M21 / N20 road links into the City from the peripheral settlement areas to the south-west of Limerick.

The opportunities that Foynes presents as an employment hub are substantial but the accessibility of the location is poor. If Foynes is to grow its potential and the available land-banks along the estuary in public ownership are to develop, the N69 road and Foynes rail corridor require significant upgrading. Progress should be made on the design of upgrades for these corridors to be ready for when possible direct foreign investment arrives such that they may be fast-tracked through construction having already passed through the design process.

In line with the provisions of the Mid-West RPGs there is strategic need for a rail corridor to be preserved linking Shannon Airport to the existing Limerick/Ennis rail route as this link is seen as being vital for the long term viability of the airport. The recently shelved M21 road improvement scheme requires urgent reconsideration given its importance as a strategic link in the region. Any review needs to be undertaken in conjunction with connectivity between the N69 and M21. The outcome of the assessment and the design of the scheme should be progressed to planning application stage.

2.4.7 > WATER TRANSPORT

The Shannon River is a major resource in the region for the transportation of Imported and Exported goods and services into and out from the region. The Shannon Foynes Port Company Ltd. (SFPC) is the second largest port operation in Ireland and currently operates two major ports (Limerick and Foynes) and the Shannon Airport Fuel Jetty.

In line with the provisions of the Mid-West RPGs there is a strategic need for a rail corridor to be preserved linking Shannon Airport to the existing Limerick/Ennis rail route as this link is seen as being vital for the long-term viability of the airport.

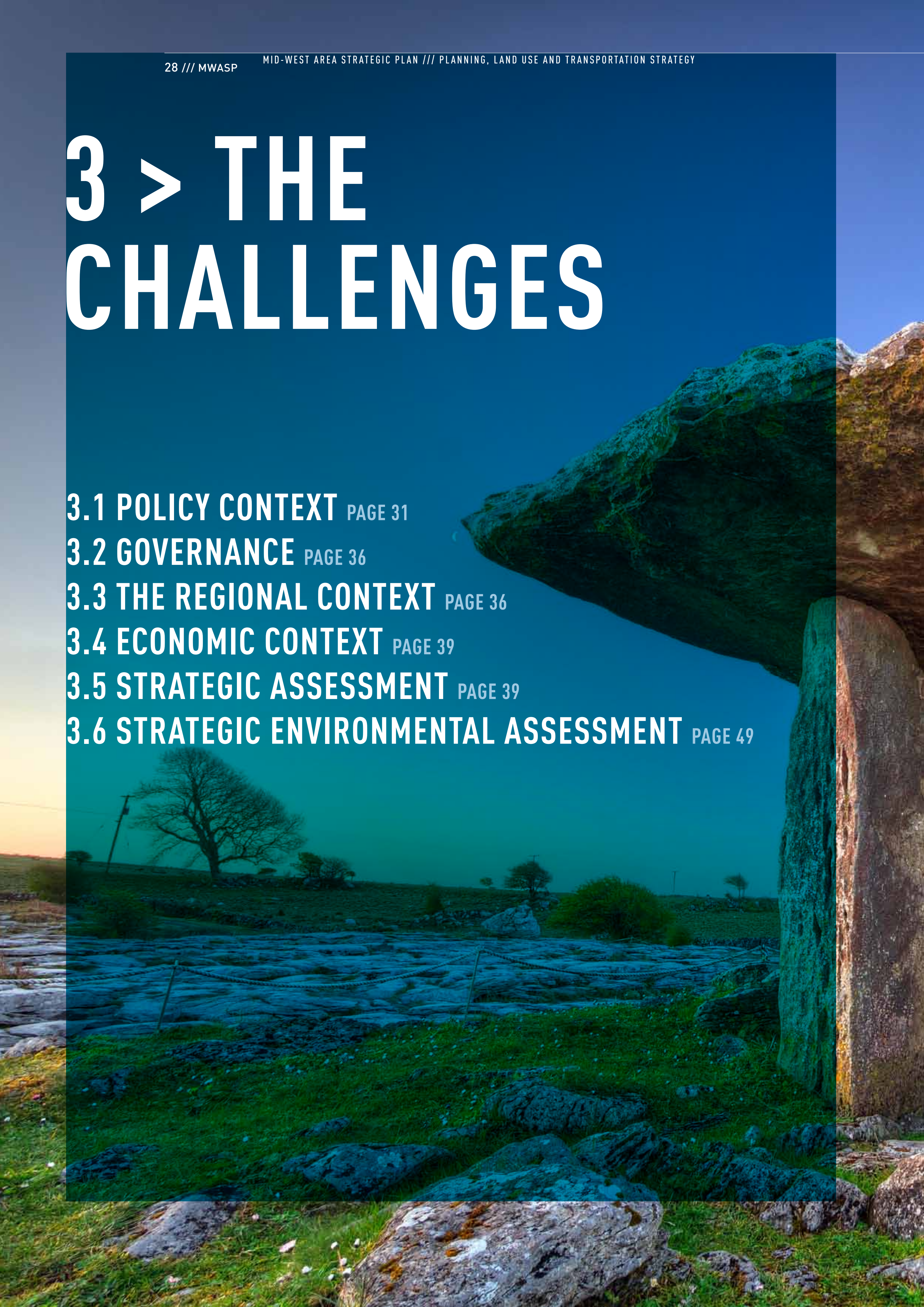
This company has statutory jurisdiction over all marine activities for a 500km² areas on the Shannon Estuary stretching from Kerry/ Loop Head to Limerick City. The company provides a variety of services including the management of navigation, marine safety and a number of services which include warehousing, logistics and cargo handling.

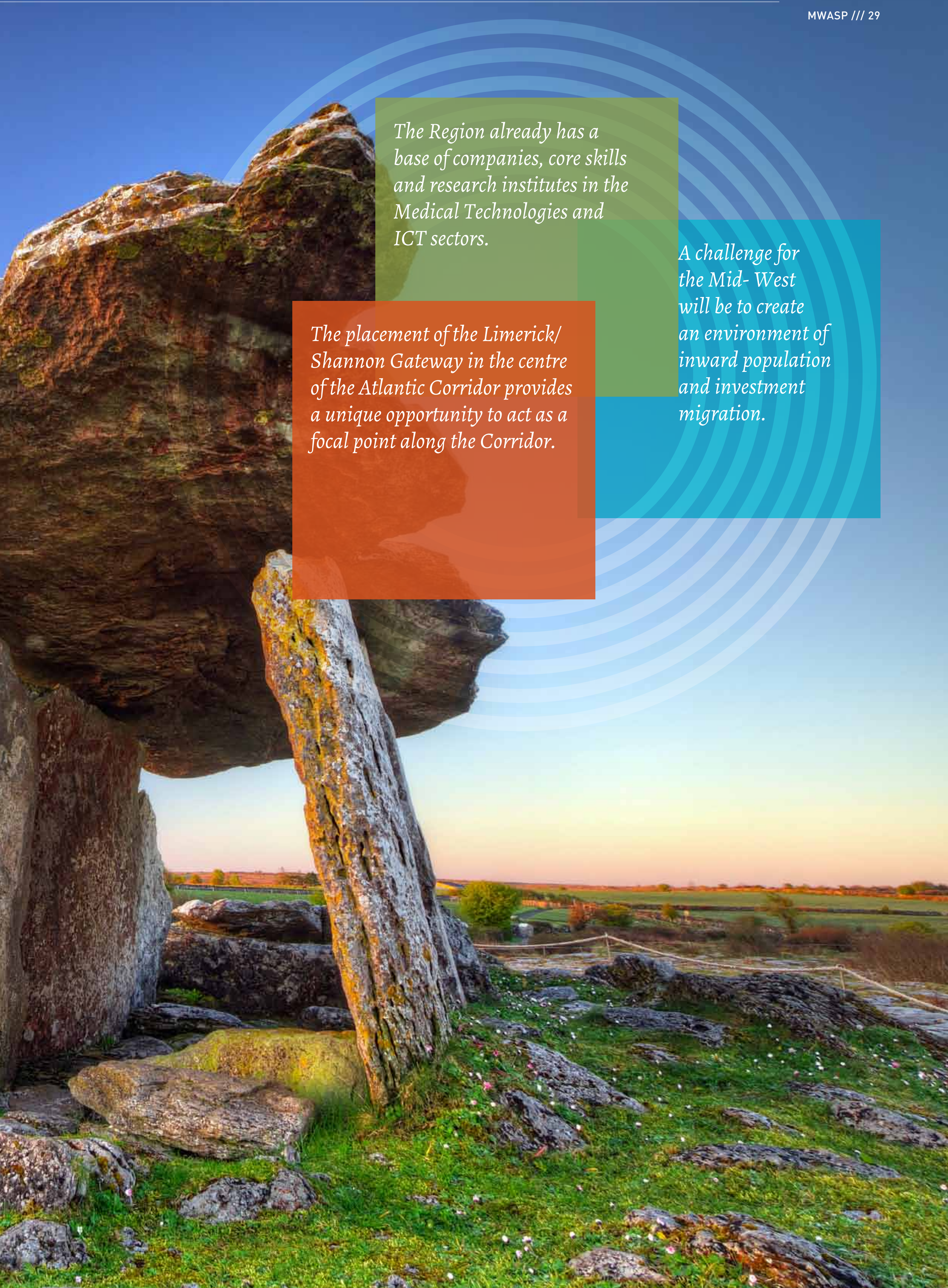
Vessels varying in size from 10,000 to 200,000dwt are handled within the Shannon Estuary area and tourism is promoted through the accommodation of cruise ships at Foynes Harbour. The port company is actively pursuing the objective to becoming Ireland Green Energy Port for handling of Green Energy imports to Ireland. Plans are in place for substantial growth of the SFPC activities in the Mid-West Region.

In addition to the port company there are a number of privately owned operated ports at Moneypoint and Aughinish Alumina, Tarbert/ Killimer which provide critical infrastructure for marine based transport facilities.

The Shannon Ferry Group Ltd. provides daily services linking Kerry to County Clare. Such service saves 137km travel between the two counties daily savings provide 42 trips in summer and 24 trips in winter with a capacity of up to 60 vehicles and 350 passengers per sailing.

3 > THE CHALLENGES





The Region already has a base of companies, core skills and research institutes in the Medical Technologies and ICT sectors.

The placement of the Limerick/ Shannon Gateway in the centre of the Atlantic Corridor provides a unique opportunity to act as a focal point along the Corridor.

A challenge for the Mid- West will be to create an environment of inward population and investment migration.

3 > THE CHALLENGES

Economic growth, social development and the management of the environment must be mutually supporting. Sustainable development integrates, and achieves a balance between, each of these areas. The Mid-West Region, in terms of the enterprise dynamic, has achieved a notable economic growth in the ICT and internationally traded and the medical technologies service sectors in recent years. There have also been great advances in addressing social development challenges thorough the Regeneration projects and a continuous approach to protecting the environment.

However, challenges still remain and while the emphasis of national policy has shifted from managing growth to stimulating economic activity, the need for more balanced and sustainable patterns of development remains. The varying potential of all Irish regions should be harnessed to build a sustainable national economy. A region's capacity to innovate, to create a well educated population to attract talented people, to be well connected to global markets, to have a business friendly environment, to provide quality infrastructure and to have a functioning labour market all contribute to its potential for growth.

While the Smart Economy Action Plan sets out a vision of structural reform focusing on export-led growth, innovation, R&D and highly skilled jobs, these jobs are increasingly concentrated in a select number of urban centres; notably Dublin, Galway and Cork. Little attention has been given to the regional aspects of this strategy and the effects on balanced regional development.

According to the OECD[32], Ireland needs to design regional polices that combine bottom-up with top-down approaches designed to unlock the regional potential of all Irish regions.

32 Key message delivered by the OECD (Joaquim Oliveira Martins, Head of the Regional Development Division at the OECD) to the Regional Studies Association at NUI Maynooth, Sept 2011

Making Ireland's Development Sustainable, 2002 (Department of the Environment and Local Government), suggests that a sustainable society provides the resources with which to maintain a strong economy, a high quality environment and an equitable society.

3.1 > POLICY CONTEXT

3.1.1 > NATIONAL SPATIAL STRATEGY

In this context, a key concept of the National Spatial Strategy, 2002 to 2020, is to promote more spatially balanced development by developing the potential of each region in the country. The potential of an area is the capacity that it possesses, or will possess, for development. This potential arises from its natural resources, population, economic and social capital and its location relative to markets. To achieve a greater balance, the NSS seeks to capitalise on the strengths of cities and major urban areas, as a mechanism of enhancing wider regional growth.

'Gateways' and 'Hubs' are identified which have the higher order functions and critical mass of population necessary to help realise this goal. Gateways are engines of regional and national growth based on their strategic locations. They also provide national scale social, economic, infrastructure and support services. Hubs support the national and international role of the Gateways and in turn energise smaller towns and rural areas within their sphere of influence. In the Mid-West, Limerick / Shannon is designated as a Gateway and Ennis as a Hub. The Limerick / Shannon Gateway, therefore, is to act as a driver for the region in order to improve its competitiveness at the national and international level.

3.1.1.1 > The Atlantic Corridor

The placement of the Limerick/Shannon Gateway in the middle of the Atlantic Corridor provides a unique opportunity to act as a focal point along the Corridor.

To further progress the NSS, the Limerick / Shannon Gateway and Ennis as a Hub, are placed in the context of the Atlantic Corridor through the Atlantic Gateways Initiative, 2006. The Atlantic Corridor concept seeks to combine the strengths of the Cork, Limerick/ Shannon, Galway and Waterford Gateways,

To achieve a greater balance, the NSS seeks to capitalise on the strengths of cities and major urban areas, as a mechanism of enhancing wider regional growth.

together with other large urban settlements in the area including Nenagh, Thurles, Ennis, Gort, Carrick-On-Suir, Tipperary, Mallow etc., to create a major economic corridor in the West with which to counterbalance the Greater Dublin Area (GDA). This initiative highlights the central location of the Limerick/Shannon Gateway between, and with direct linkages to, each of the three other Atlantic Gateways. This, and the region's national and international transportation infrastructure, presents a unique opportunity for the Gateway of Limerick/Shannon to act as a focal point along the Corridor. As a result of co-operation between the Gateways the development potential of intervening regions, and the Corridor as a whole, will be enhanced.

In this regard, the Atlantic Gateways Initiative prioritises the development of and investment in the four Gateway cities and their associated hubs. Over time, growth will be expanded outwards to accelerate the integration of intervening County towns and other urban and rural areas.

3.1.2 > NATIONAL RECOVERY PLAN (2011 – 2014)

The National Recovery Plan (2011 – 2014) provides a blue print for a return to sustainable growth in the Irish economy. In particular it:

- sets out the measures that will be taken to restore order to public finances.
- identifies the areas of economic activity which will provide growth and employment in the recovery.
- specifies the reforms the Government will implement to accelerate growth in those key sectors

The placement of the Limerick/Shannon Gateway in the centre of the Atlantic Corridor provides a unique opportunity to act as a focal point along the Corridor.

3 > THE CHALLENGES

The plan estimated by 2014, that current expenditure would be approximately €7 billion lower and capital expenditure €3 billion lower than it was in 2010.

The plan identified savings to be achieved in all of the departments including Transport, where expenditure is to be curtailed on roads, public transport and regional airports.

There are two pillars to the strategy for competitiveness, growth and employment:

- remove potential structural impediments to competitiveness and employment creation.
- pursue appropriate sectoral policies to encourage export growth and a recovery of domestic demand.

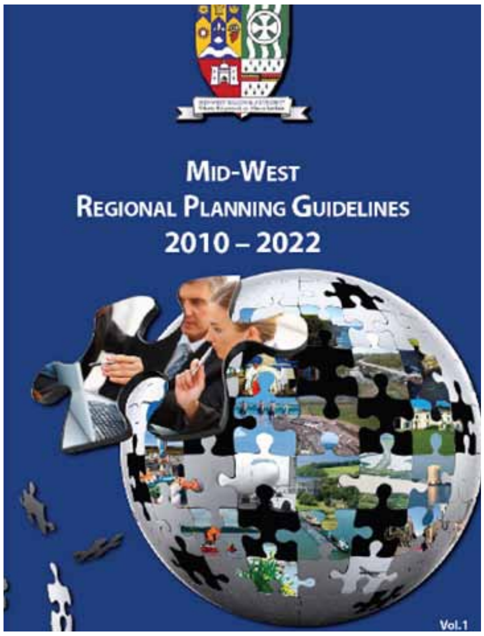
3.1.3 > INFRASTRUCTURE AND CAPITAL INVESTMENT 2012-16: MEDIUM TERM EXCHEQUER FRAMEWORK

Over the medium-term, there will be a lower level of resources available for capital investment. It is estimated that capital expenditure will drop from €3.9 billion in 2012 to €3.3 billion by 2015. While not ideal, this is the reality of the fiscal challenge which the Government faces. This review seeks to ensure the appropriate level and sectoral allocation of investment, given the overriding fiscal pressures. The review assesses the existing capacity of Ireland's infrastructure and identifies remaining gaps which must be addressed to aid economic recovery, social cohesion and environmental sustainability. In relation to the Mid-West Region the government is dedicated to honouring existing contractual agreements and other commitments e.g.

- King John's Castle and the Limerick Riverside (tourism capital investment programme).
- the University of Limerick Medical School.
- funding will be made available in the medium term for Limerick Regeneration.

Other projects will be examined on a case by case basis having regard to the economic and financial considerations in place in coming years.

Achieving this strategy requires patterns of development in Metropolitan Limerick, Ennis and key regional towns to be complementary and mutually supporting.



3.1.4 > REGIONAL PLANNING GUIDELINES (RPGS)

Within the policy framework of the NSS and the Atlantic Gateways Initiative, the Regional Planning Guidelines, 2010 to 2022, sets out a detailed development strategy for the Mid-West region. The RPGs recognise the impact of the current economic downturn, emphasising the need to focus development in the locations with the greatest potential. To achieve this, a stronger central core around Limerick, Shannon and Ennis is needed that will drive growth in the wider region. As such, the Guidelines prioritise the development of the Gateway and Hub to achieve the critical mass and value-added investment which the wider region requires. In this way, the Gateway and Hub will provide regional and national level facilities, whilst the key regional towns will provide county and local level facilities. Achieving this strategy requires patterns of development in Metropolitan Limerick, Ennis and key regional service towns to be complementary and mutually supporting.

However, the RPGs recognise that there is and will remain a strong rural population base in the Region. The potential for rural based employment and local initiatives should also be promoted. Recent planning legislation has provided the Mid-West Regional Authority with addition responsibilities to coordinate strategic planning and infrastructure development for the region. The RPGs also highlight the development potential of the Shannon Estuary for a variety of uses.

This, with the protection of Natura 2000 sites is assessed in the Shannon Integrated Framework Plan.

3.1.5 > HOUSING POLICY

Housing policy is a key component to the successful implementation of these national and regional strategies. The Limerick and Clare Joint Housing Strategy, 2011 to 2017, prioritises the Limerick/Shannon Gateway, followed by Ennis, as the primary locations in the region for residential development. In the Gateway, the growth of the City is prioritised to rebalance recent patterns of development which saw significant population increase in the Limerick Suburbs. The Strategy acknowledges that the NSS and RPG population targets are ambitious, particularly as there has been a sudden slowdown in housing output. Responding to this challenge will require;

- the development of the City Centre as a primary employment location;
- progress on the Regeneration Programme; and
- the sustainable development of the Dock Road area and suburban locations.

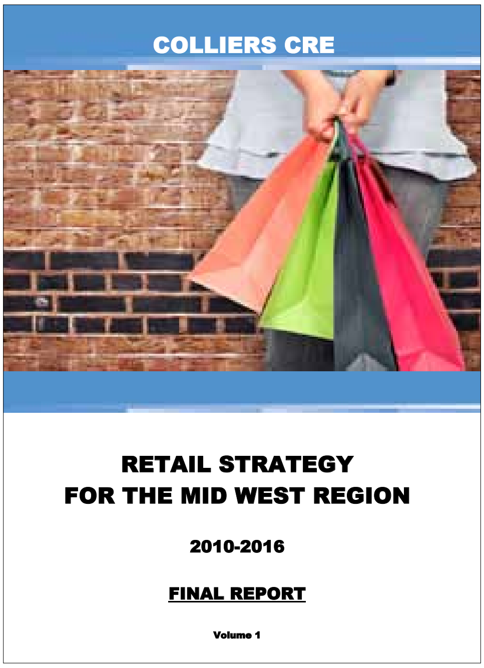
The Strategy finds that the Regeneration Programme in particular is critical to redirecting population growth into Limerick City and to the success of the Gateway overall. It finds that insufficient growth in

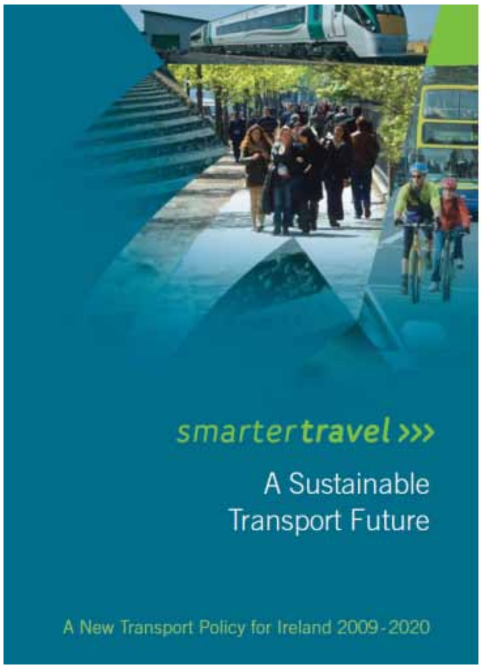
Responding to this challenge will require the development of the City Centre as a primary employment location.

the Regeneration Areas would have serious implications for the implementation of regional and national policy.

The Housing Strategy indicates the substantial proportion of individual houses built in the Region since 2005. With one-off homes in the region reaching 30% of new home developments, the region continues to undermine the need to achieve the population targets identified for key settlements in the RPGs. It has long been established that the costs of a dispersed settlement pattern can be high. A proliferation of one off houses in the countryside can be up to five times more expensive to create and three times more expensive to services on an on-going basis. The Joint Housing Strategy for Limerick and Clare 2011 indicates that since 2005 the extent of single house completions in the area remains substantial. The continuation of an overly dispersed settlement pattern in the Mid-West will undermine the achievement of the settlement targets in the RPGs and the MWASP. The historical settlement pattern makes sustainable transport options difficult to supported or achieved and will continue to be compromised unless the settlement patterns are changed.

In 2009, Forfás issued a Statement on Energy in Ireland, which stated that *"Ireland has opted for a policy of land use planning which has resulted in the sprawl of low density housing development. This approach which was socially popular is not sustainable from an energy, environmental, climate change or quality of life perspective."*





3.1.6 > RETAIL STRATEGY

Similarly, in relation to retail, the Retail Strategy for the Mid-West Region, 2010 to 2016, highlights that Limerick City Centre has fallen behind other cities in the State and no longer performs to its Tier 1 Status in the shopping hierarchy. The Strategy highlights that if the redundancy of the City Centre as a retail destination continues, it will accelerate the broader deterioration of the City where it may never regain its premier position in the region. The Strategy finds that too much trade has been lost to suburban locations. Limerick City Centre is in urgent need of comprehensive retail development that will prevent further erosion of its retail position and stimulate the wider regeneration of the City. The Strategy seeks to re-establish Limerick City Centre at the top of the regional hierarchy as the preferred location for new retail development in the Limerick Metropolitan Area.

The publication also outlines the hierarchy of retail centres in the areas of Clare and Limerick County Councils'. North Tipperary's Retail Strategy, July 2011, outlines the hierarchy of North Tipperary and the respective statutory councils contained therein.

Trying to achieve the Smarter Travel Policy objectives for the region may be difficult in the timeframe of the strategy so achieving it in urban centres should be the primary focus with improvements in the hinterland.

3.1.7 > SMARTER TRAVEL

Smarter Travel is the government policy which sets out a long-term plan to achieving a sustainable transport system for Ireland. The plan outlines how this can be achieved through a range of actions such as encouraging modal shift away from the car, promoting fuel efficiency and new technology, and improved planning.
The plan recognises that current transport and travel trends in Ireland are unsustainable, and that if present policies continue, congestion will get worse, transport emissions will continue to grow, economic competitiveness will suffer and quality of life will decline.

The goals of Smarter Travel are to:
- Improve quality of life and accessibility to transport for all and, in particular, for people with reduced mobility and those who may experience isolation due to lack of transport
- Improve economic competitiveness through maximising the efficiency of the transport system and alleviating congestion and infrastructural bottlenecks
- Minimise the negative impacts of transport on the local and global environment through reducing localised air pollutants

and greenhouse gas emissions
- Reduce overall travel demand and commuting distances travelled by the private car
- Improve security of energy supply by reducing dependency on imported fossil fuels

The key targets of smarter travel are to reduce work-related commuting by car from 65% to 45%, and increase other modes such as walking, cycling, public transport and car to 55%.

Smarter Travel includes 49 actions which can be grouped into:
- actions to encourage smarter travel
- actions to deliver alternative forms of travel
- actions to improve the efficiency of motorised transport
- actions to ensure integrated delivery of policy

Smarter Travel policy document acknowledges that dealing with these issues in rural areas will be particularly challenging. Census data from 2011 would indicate that the region, as a whole, faces a significant task in trying to achieve this policy objective whereas pockets of urban intensification have a far greater opportunity of delivering the required change. Therefore the focus of smarter travel reform should primarily deal with major urban centres, where greater benefit may arise from investment. Some of the local authorities have already compiled comprehensive Smarter Travel investment portfolios that are worthy of investment and will form the basis of achieving behavioural change in targeted areas.

Achieving the targets set out in the National Policy will not be achieved for the entirety of the Mid-West within the life-time of the regional strategy and the Smarter Travel Policy must be set as a longer term objective for the region, to be reflected in future statutory plans. However, the initial investment in more sustainable modes for the urban areas must be prioritised, in tandem with the prioritisation of land use development, and upon review of the Strategy significant progress should have been made with focused investment for the main settlements.

3.1.8 > STRATEGIC INTEGRATED FRAMEWORK PLAN FOR THE SHANNON ESTUARY (SIFP)

Clare County Council have procured advisors on behalf of Kerry County Council, Limerick County Council, Limerick City Council, Shannon Foynes Port Company and Shannon Development to undertake the preparation of a Strategic Integrated Framework Plan (SIFP) for the Shannon Estuary.

The aim of the Shannon Integrated Framework Plan is to identify locations to promote future development, economic growth and employment that can be sustainably located in the Shannon Estuary.

The aim of SIFP is to identify the nature and location of future development, economic growth and employment that can be sustainably accommodated within the Shannon Estuary whilst ensuring that the habitat status of the Natura 2000 and other environmentally sensitive sites would not be reduced as a result of the short-term or long-term impact of such developments. Such developments may include, but are not limited to: port functions, shipment, aquaculture/mariculture, fisheries, eco-tourism, leisure, culture, tourism, heritage, industry, energy generation, fuel storage, aviation, minerals/aggregates, transportation and agriculture.

The draft report is due to be published in the Autumn of 2012.

3.1.9 > POLICY ASSESSMENT

National and regional spatial policy seeks to develop the potential of cities, towns and rural areas to maximise the country's overall potential. However, the investment

3 > THE CHALLENGES

The strengthening of a settlement hierarchy will help to avoid settlements undermining each other and ensure that the benefits of growth and scale are accessible to more people and places.

and capacity for development with which to build on this potential is limited. The policy response is to prioritise the development of places with the greatest potential within a recognisable spatial structure.

Initially developing cities and major urban areas will enable the emergence of the critical mass needed to support higher order infrastructure, facilities and services that contemporary societies require. In the Mid-West, the development of Metropolitan Limerick, Shannon and Ennis is prioritised to create a strong and dynamic core for the region. This can only be achieved in conjunction with complementary policies which manage the development of other locations. The strengthening of a settlement hierarchy will help to avoid settlements undermining each other and ensure that the benefits of growth and scale are accessible to more people and places. As improved infrastructure, facilities and services are provided at these prioritised locations, growth will be expanded outwards to integrate intervening urban and rural areas. This will help to bring improved quality of life, living standards and social cohesion to the region overall.

Areas must be managed in a coordinated way to maximise the potential returns of this strategy instead of duplicating investment and functions. This will integrate areas to broaden access to the greater pool of benefits generated. The MWASP will contribute to this by improving the integration of land use and transportation and planning the stimulation of employment nodes at the regional level. The development of the Limerick/Shannon/ Ennis axis will create a strong and dynamic core in the Region.

3.2 > GOVERNANCE

The Development Plans for each of the Mid-West Local Authorities contain the social, economic and physical development strategies of each administrative area. Each plan remains broadly consistent with the NSS and the RPGs. The Plans seek to implement the spatial and quantitative strategies of these strategic documents and support the goal of balanced regional development. In this regard, the Development Plans emphasise the role of the Limerick / Shannon Gateway as the primary driver of growth in the Mid-West. They also promote a hierarchy of strong settlements with which to support growth at the Local Authority and regional level. This provides the critical mass, facilities and services necessary to drive growth and development at the local level and help sustain smaller settlements and communities. Vibrant and viable settlements provide the basis for strong economies and communities and support a greater range of sustainable modes of transport within and between settlements. The MWASP seeks to re-enforce the spatial strategies of these plans and to support the goal of balanced regional development.

3.3 > THE REGIONAL CONTEXT

The Mid-West Region is already the location of choice for a substantial population and a large business economy that enjoy the attractive and vibrant region. The challenge is to continue to grow the region as an attractive location and create inward migration of population and investment.

This requires the development of each area within the overall context of the region. There is also a need to better integrate the Mid-West with each of its neighbouring regions to support national policy goals. While spatially and functionally diverse, the development of settlements within and between the regions can be provided for in a complementary way.

In most settlement areas services and job growth relative to population increases have failed to match one another.

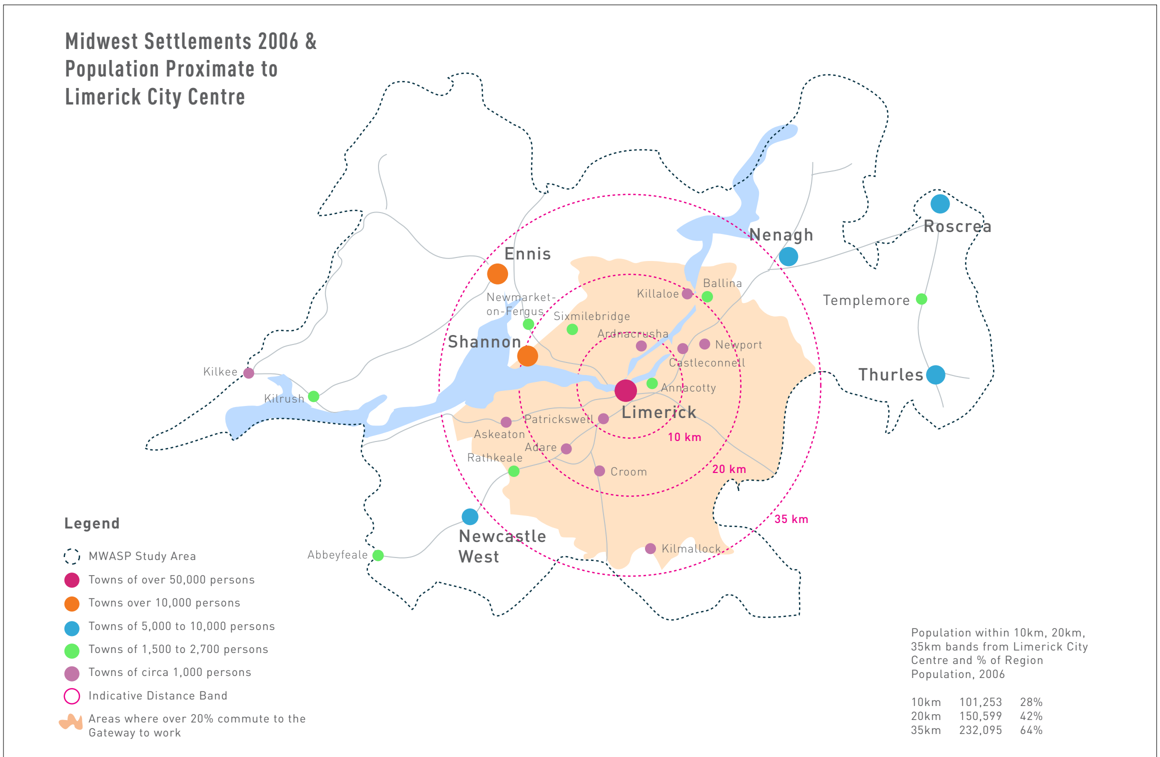
3.3.1 > THE HINTERLAND

Communities located near the periphery of the region have developed differently in recent years. Some have vibrant communities supported by strong local economies; others have experienced outward-migration, increased deprivation and reduced living standards. Many of these areas are supported by a narrow economic base which can be less robust in difficult economic circumstances. In addition, some of these areas are more strongly linked to large towns in other regions than to those in the Mid-West.

Other areas are strongly linked to larger urban centres such as Ennis, Newcastle West, Nenagh, Roscrea and Thurles. These centres have generated significant pressure for development in their surrounding rural areas. In addition, some of these centres have experienced significant suburban development and a low provision of facilities, services and infrastructure and job growth relative to population increase. It is important to manage the development of these centres, the development of surrounding areas so as to promote their role as links between the Metropolitan Area and smaller centres throughout the region.

The Mid-West must support the sustainable development of each of these areas over the long term without compromising their individual character and strengths. The main way in which a strategic land use and transportation plan can achieve this is by strengthening and supporting the settlement structure of these areas and improving access between them and the Metropolitan City. Figure 3.1 illustrates the Mid-West settlement hierarchy in 2006. It also shows the function urban area of the 'City Region' (in green) within which 20% or more of the population commute to work in the Metropolitan Area. It is clear that distance, the quality of the road network and the proximity of larger urban centres are key factors in determining the extent of the City Region.

Figure 3.1: The Settlement Structure of the Mid-West, 2006.



3 > THE CHALLENGES

3.3.2 > THE CITY REGION

In recent times, suburbs and villages close to the city have grown and commuting times and private car use have increased. The City Centre has lost population and has been developed at a low density relative to other European and Irish Cities. The continued existence of a low density city at the core of the region and the proliferation of small, residential settlements within commuting distance has inevitable consequences for service provision, infrastructural investment and the sustainable development of the entire region. The creation of a city region based on urban sprawl and long distance, car-based travel could undermine the emergence of high quality residential environments and higher order jobs, facilities and services. It could also negate the potential to integrate areas in a sustainable manner through high quality public transport.

As Ireland follows the global trend of increasing urbanisation, the spatial relationship between settlements and the regional capital, particularly their relative size, will have significant implications for the provision of services and infrastructure in the region. It is essential to manage the development pressure arising in and from the City Region as the area can also act as a bridge between the wider hinterland and the city if the growth and development of centres are managed correctly.

For the city to be a driver of economic competitiveness it must be a strong and successful place that enhances quality of life for its citizens.

3.3.3 > THE CITY

The City must be an attractive place to live, work and visit so that it can function as the focus of the region and it requires revitalisation to achieve this. Quality of life is essential and in cities it is derived from a range of components. These include: the availability of employment; access to social, cultural and amenity facilities; good public transport and a well planned living environment, including public realm, which is fit for purpose.

For the city to be a driver of economic competitiveness it must be a strong and successful place that enhances the quality of life for its citizens. The Limerick City Centre Strategy 2008 should be implemented in the short term as a matter of priority. The regeneration of the city, through the activities of newly established Office of Limerick Regeneration, is considered critical in this regard. The potential of the city centre and riverside areas should be fully realized. These elements, combined with strong educational and research facilities will attract the entrepreneurial and creative skills base necessary to drive sustainable economic, social and cultural growth, development and diversification. The most efficient way to provide these elements is through a well planned, compact city with a critical mass of population and higher order services and facilities. This requires appropriate investment in infrastructure and the integration of transport and land use. In turn, the size and form of a city informs both public and private investment decisions and directly influences the quality of life to be achieved.

The development of a strong, cohesive region requires integrated strategies for environmental protection and physical, social and economic development, with a particular emphasis on the integration of planning, land use and transportation.

3.4 > ECONOMIC CONTEXT

Recent major reports and plans have all been broadly consistent in terms of the strategic direction, steps that must be taken and priorities for the Mid-West Region as a means to achieving its economic potential.
The key reports used to inform the economic strategy include:

- Forfás, Regional Competitiveness Agenda, Volume I – Baseline Data & Analysis, Mid-West and Volume II - Realising Potential Mid-West, 2010;
- Mid-West Task Force, Interim Report, 2009;
- Mid-West Regional Authority, Regional Planning Guidelines 2012-2022, September 2010;
- Colliers CRE, Retail Strategy for the Mid-West Region 2010 – 2016, and
- The City and County Council's Development Plans.

The key priorities highlighted for the Region are as follows:

- To grow employment and tackle growing unemployment;
- To improve cost competitiveness;
- To improve and accelerate infrastructure development and connectivity in terms of transport and broadband;
- To improve the education, training and skill base;
- To increase the support for innovation, research and development and enterprise;
- To develop a number of key sectors including medical technology, ICT, food, internationally traded services, logistics and supply chain management, energy; tourism; retail (in certain areas); forestry; commercial fishing and mining;
- To increase support for tourism and develop a distinct proposition and clear product based on the Regions distinctive assets;
- To address issues related to Limerick City, in particular, the perceived image of the city, decrease in population and vacant retail floor space and office accommodation; and
- To address the governance structure of the Region and for the relevant local authorities in the Region to take a more collaborative and co-ordinated approach to the co-ordinated planning and development of the Region.

3.5 > STRATEGIC ASSESSMENT

It is clear that the region comprises a variety of different economic areas. It is also clear that recent patterns of economic change in the region have been imbalanced. This has led to the concentration of opportunities in some areas and challenges in others. In certain instances, high unemployment and deprivation have become spatially demarcated and persistent over time, although regeneration projects are attempting to redress issues. Existing patterns are not sustainable due to the significant inequalities and costs that are generated, evident in the emergence of the Regeneration Programme and the Mid-West Task Force. A more sustainable balance of development throughout the Region is required.

Responding to these issues has been made more difficult by the limited potential for growth and reduced availability of public and private investment. Achieving positive change in this context requires a focussed, coherent and coordinated response from all stakeholders. The policy response must prioritise specific issues and maximise returns for the entire region. There is a need therefore, for greater cooperation in the preparation and implementation of policy so as to maximise the returns from this limited potential.

3 > THE CHALLENGES

The MWASP contributes to this strategy and responds fully to these key issues, with a focus on the following key areas:

- Metropolitan Limerick
- Shannon
- Ennis
- Nenagh
- Newcastle West
- Rural hinterland

Any proposed transport options must provide the connectivity, accessibility and economic support for the region. Notwithstanding policies aimed at reducing the need to travel, developing, implementing and promoting the use of alternates to the car that connect home, work and recreational destinations must be assessed against population and employment placement.

A spatial strategy for the integration of settlement, economic development and transportation is proposed.

It is clear that recent patterns of economic change in the region have been imbalanced. This has led to the concentration of economic opportunities in some areas and challenges in others.

3.5.1 > A DETAILED ECONOMIC REVIEW

An economic review of the following locations was undertaken:

- Limerick City Centre;
- Raheen / Dooradoyle area;
- Castletroy / Plassey / Annacotty area;
- Newcastle West;
- Shannon;
- Ennis;
- Nenagh;
- Thurles and
- Roscrea.

Details of the review are contained in Appendix E, F & G. In summary it has identified key growth sectors for the region.

3.5.1.1 > SWOT Analysis of the Mid-West Region

From a review of the above information and including additional information, Tables 3.1-3.5 have been developed and highlights the economic strengths, weaknesses, opportunities and threats (SWOT) pertaining to the Mid-West Region. This SWOT analysis forms a fundamental input into shaping the economic strategy for the Region and is based on a review of the existing reports on the Region and PwC's own analysis/review.

Table 3.1: SWOT Analysis of the Mid-West Region. Category: **Infrastructure**

Key Strengths	Key Weaknesses
• **Road links** to Galway, Dublin and Cork have all been **improved.** • **Limerick Tunnel** opened in July 2010 and will connect the M7-M18. • **Shannon International Airport** offers domestic and international flights. The airport has no performance limitations, slots, curfew or noise restrictions. The airport has large MRO (maintenance, repair and overhaul) functions. Recently enhanced by extension of pre-clearance for US customs. • **Shannon estuary** which has a number of key ports providing for shipping access. • Shannon Foynes Port Company is the **second largest port operation** in the country. • There are **incubation, innovation centres and research institutes**. • Choice of **quality business and technology parks** that are fully serviced with quality building solutions e.g. the Shannon Free Zone, Raheen Industrial Estate, National Technology Park, Annacotty Industrial Estate etc. • The Region is relatively well served in terms of **access to higher education**, including UL, LIT, Mary Immaculate College, LIT Tipperary, and Limerick School of Art & Design etc.	• Travel time of rail service between Limerick and Cork and Dublin. • Major transport infrastructure elements to be addressed are the construction of theN20 to Cork and the completion of the M18 to Galway. • Poor road infrastructure serving the ports on the Shannon Estuary. • Lack of sufficiently developed deep water berthage at the Port of Foynes to facilitate export led growth and international demand.
Key Opportunities	**Key Threats**
• **Improved road access** – work currently underway on: the Atlantic Corridor road project linking Waterford to Letterkenny, including M18, with a combination of dual carriageway and motorways, improving M21 & N69, N24 and N20 to Cork. • To improve the **Limerick-Cork rail link** (Mid-West RPGs 2010 – 2022). • To **develop deep water sites** on the Shannon Estuary, in particular at the Port of Foynes. • The **further development of Shannon Estuary and its ports**. • There are plenty a significant number of **greenfield sites** in the region zoned commercial/industrial available for investment. • Development of office block infrastructure in Limerick City Centre. • **Considerable airside and commercial zoned land available** on and near the Shannon Airport – e.g. significant potential for the airport - development of airfreight/cargo related facilities. • **Improve broadband infrastructure and pricing** to allow SMEs to improve productivity, tap into new markets and to introduce new service delivery. • To improve the Limerick-Nenagh-Roscrea-Ballybrophy-Dublin rail link.	• The poor infrastructure around Shannon Foynes Port.

Table 3.2: SWOT Analysis of the Mid-West Region. Category: **Demographics and Education**

Key Strengths	Key Weaknesses
• Excluding overseas destinations, the Region ranked second to Dublin and the South-West in terms of **attracting PhDs and Research students**. (Mid-West Regional Authority Profile 2012) • **Lower cost of living than Dublin** e.g. average rent in Limerick City was €675 and in Dublin City was €1,032. (The Daft.ie Rental Report, Q1, 2012)	• **16.8% unemployed** compared to 14.8% nationally. Third highest employment rate after the Midlands and South East Region. (CSO, QNHS Q3, 2011) • **Live Register** – over 38,000 (April 2012) (CSO, Live Register, May 2012) • One of the **highest percentages of long-term unemployed** in the country (9.8%), an increase of 7.7% points since 2007. Areas such as Southhill and Moyross (regeneration areas) have contributed substantially to this (CSO, Special Data Run, Long term unemployment rate, Q3 2011) • **Marginally higher 'dependent' population** than nationally, 40% in the Region versus 39% in the State (CSO, Census 2011). • A relatively high proportion of **early school leavers** (c.14%) than nationally (c.12%), however this has declined over recent years. • The proportion of people with a **3rd level degree** or higher is **lower** (26.5%) than other Regions such as Dublin (35.6%), the Mid-East (30.8%) and the South-West (28.6%).(CSO, Census 2006) • Higher concentration of people with **qualifications in the areas of Engineering, Manufacturing and Construction** than nationally (CSO 2006). • **Retention/attraction of the key 25-29 year old** age cohort is low compared with some other Regions 7.9% compared with 8.8% State (Mid-West Regional Profile 2012). • Attracted a relatively **lower amount of research funding** than other comparable Regions. (Forfás, Regional Competitive Agenda, Mid-West, 2010) • **Underperforming** in terms of **innovation capacity and performance**. (Forfás, Regional Competitive Agenda, Mid-West, 2010) • **The current governance structures** mitigate against more effective and strategic urban planning and development in their current state. • **The image of Limerick City**, although based on media coverage of social problems and crime generally limited to pockets of the city, has impacted the perceived quality of life in the region and a negative effect on attracting potential investors. • **Broadband coverage is limited** in rural areas and **the quality of broadband service** in some of the covered areas is an issue. (Forfás, Regional Competitive Agenda, Mid-West, 2010)
Key Opportunities	**Key Threats**
• **Investment in skills and training** to develop capabilities and in-depth expertise in a range of areas form continuous improvement, lean principles, automation to Quality by Design (QbD), Process Analytical Technology (PAT), Supply Chain Management (SCM), international logistics, branding etc. Core skills need to be complemented so that people are equipped with multidisciplinary skills (Forfás, Regional Competitiveness Agenda, Realising Potential, Mid-West 2009). • Improve **linkages/cooperation between the HEIs and industry to increase innovation.** • **Higher concentration** of people with qualifications in computing (7.2%) than nationally (6.7%). (CSO, 2006) • To address the ongoing fall in Limerick City's population and **regenerate and re-brand the City.**	• A continued **decline in the population of Limerick City** (CSO, Census 2011 Town and County).

Table 3.3: SWOT Analysis of the Mid-West Region. Category: **Tourism and Leisure**

Key Strengths	Key Weaknesses
• Limerick was the **European City of Sport 2011**. • Significant **cultural resources** e.g. a concert hall at University of Limerick, Glor Music Centre in\Ennis, the Hunt Museum in Limerick City and The Source Arts Centre in Thurles. • The Region has **three of the top 20 most visited tourist attractions** in Ireland in 2010 namely: the Cliffs of Moher (720,000), Bunratty Castle (265,000), Holy Cross Abbey (240,000) (Fáilte Ireland Visitor Numbers, 2010). Other attractions include the Burren, Loop Head/West Clare peninsula, Adare, Lough Derg amenity area. • **Good sports facilities** e.g. Thomond Park, Gaelic Grounds, University of Limerick, Semple Stadium, Limerick Racecourse and Greyhound Stadium and world class golf courses.	
Key Opportunities	**Key Threats**
• Grow **tourist visitor numbers** throughout the region – increase activity-based tourism, including boating, angling, wildlife watching and walking along the Shannon, city tourism, rural tourism, cycling and golfing as an alternative to farming. • Grow the **cruise line business.**	• **Attractive and cheap tourist destinations** in Europe. • **Continued decline in overseas tourists** visiting the Region e.g. in 2007 close to 1.3 million overseas tourists visited the Region, this dropped to 770,000 in 2010 with a -39% decrease in revenue (Fáilte Ireland, 2011). • **Decline in visitor numbers to all the major tourist attractions** in the Region between 2007 & 2010 (Fáilte Ireland, 2011)

Table 3.4: SWOT Analysis of the Mid-West Region. Category: **Regional Bodies and Initiatives**

Key Strengths	Key Weaknesses
• There are a number of **state planning and development organisation exclusive** to the region e.g. **Mid-West Regional Authority** (prepare regional planning guidelines, review development plans etc.), **Shannon Development** (promoting and developing the Shannon Region), **Limerick Regeneration** (improve physical environment, quality of life etc.), **Mid-West Task Force** (develop proposals to address current unemployment challenges and ensure the future potential of Region is realised) etc. • A number of **networks and groups exclusive to the greater Region** e.g. Supply Network Shannon, Atlantic Technology Corridor, Atlantic Way, Eco-Industrial Network (Adapted from ITI, Business Networks on the Island of Ireland, 2006) • There a number of supports available including company network supports, **Industry-Led research Platforms, TechSearch and Skillnets** e.g. Limerick Chamber Skillnet, Mid-West Regional Engineering Skillnet, Taste4success Skillnet etc. (Skillnet directory 2008/2009) • The **development agencies and HEIs have demonstrated their ability to work collaboratively** to achieve common aims e.g. the **Túsnua initiative** - an initiative, launched by LIT, and including UL, FÁS, Enterprise Ireland, IDA the VECs, and the City and County Development Board which aims to retrain and educate those who have lost their jobs by providing comprehensive details about opportunities across the Mid-West.	
Key Opportunities	**Key Threats**

Table 3.5.: SWOT Analysis of the Mid-West Region. Category: **The Economy and Sectors**

Key Strengths

- **The third highest level of GVA[34] per capita in Ireland**, after Dublin and the South-West. (CSO, County Incomes and Regional GDP 2009, Jan 2012).
- **The third highest level of disposable income,** after Dublin and the Mid-East (CSO, County Incomes and Regional GDP (2009, Jan 2012)
- **The decline in employment numbers between 2007 and 2011 has been less** in the Region (-11.7%), than nationally (-16%).
- Between 2007 and 2011 the Region outperformed the State in terms of employment growth in a number of sectors between 2007 and 2011 e.g. accommodation and food service activities up 17% (this may have been helped by sports tourism and the attraction of Thomond Park), financial, insurance and real estate up 29%, public administration and defence sector up 19% and human health and social work activities up 19% (CSO, QNHS, Q3, 2011).
- Good growth in agency supported employment between 2001 and 2011 in a number of areas e.g. **business services, financial services, medical and dental instrument and supplies**. (Forfás, 2012)
- 95% of **retail expenditure by residents is spent within the Region**. (Colliers, Retail Strategy for the Mid-West Region, 2010 - 2016)
- A large share of State's energy (50%+) is sourced from the Shannon region. **Power transmission infrastructure and expertise** in power generation currently exist in the region, the area has large-scale power stations in Tarbert, Moneypoint and Tynagh and a gas transmission pipeline from Galway to Limerick. (Forfás, Regional Competitiveness Agenda, Mid-West, 2010).
- The level of business expenditure **on R&D is relatively high**, but it is limited to a small number of large companies.

Key Weaknesses

- **A decrease of 20,100 (11.7%) jobs** between 2007 and 2011. (CSO, QNHS, Q3 2011)
- **The greatest jobs losses were in industry, construction, agriculture and wholesale and retail trade** between 2007 and 2011.
- **The loss of 2,000 jobs at Dell** and subsequent indirect job losses.
- **Public sector has been a more significant source of growth** in employment than nationally, leaving the Region open to the continued impact of austerity measures.
- Between 2007 and 2011 there has been a decline in the numbers employed in a number of key sectors namely: **industry, agriculture, forestry and fishing and wholesale and retail trade.** (CSO, QNHS, Q3 2011)
- From 2001-2011 the Region experienced the **second highest decrease in agency supported FTE jobs** (-27.5%) (Forfás, 2012)
- **Agency supported jobs continued to fall** in 2011 (-1%), however the rate of decline has slowed down. (Forfás, 2012)
- **Decrease in chemicals, ICT, basics fabricated and metal products and transport equipment** agency supported employment in the Region from 2001 - 2011. (Forfás, 2012)
- **Retail footfall and sales density are significantly lower in Limerick City** then that of comparable cities e.g. the footfall is on average 40% lower than Galway and 50% lower than Cork. (Colliers, Retail Strategy for the Mid-West Region, 2010 - 2016)
- **Over-supply of retail floor space** – c.86,000 m^2 vacant (Colliers, Retail Strategy for the Mid-West Region 2010-2016)

Key Opportunities

- Continue to address cost competitiveness issues.
- Develop new direct air links with the US and high growth markets to support export growth and job creation. Improved international access through Shannon Airport will benefit a range of enterprise development, both directly (e.g. tourism, logistics) and indirectly (export oriented and global/European headquarter companies). Attract carriers to Shannon Airport which need to make a technical stop on their way to/from North America.
- In May 2012, the Government announced plans to separate Shannon Airport from the Dublin Airport Authority, and

Key Threats

- **Lack of available funding** due to high national debt. (a national issue) **Appreciation of the euro** against the currencies of major trading partners. (a national issue)
- At 17.2% the Region has the **highest proportion of its workforce employed in manufacturing and industry** in the country. The sector has been subject to increasing levels of competition from **lower cost countries** over the past decade (CSO, QNHS, Q3 2011).
- **Predominance of employment provided by Multi National Companies** in many important internationally trading sectors of the local economy – vulnerable to competition from lower cost countries.

34 GVA is the value of the Region's output less intermediate materials and services used in its production – it effectively equates to profits and wages

Key Opportunities Continued

bring it together with Shannon Development into a single entity. The Government believe this is a significant step in securing the future of Shannon Airport and aviation growth. Report by Booz and Company (Feb 2012)

- In September 2011 DAA signed head of agreement with US company Lynxs (a global airport cargo facility company) to develop a new global air freight hub at Shannon Airport (www.shannonairport.com).
- To enhance and expand port activities and create more jobs at Shannon Foynes Port, Shannon Foynes Port Company have identified a number of development projects.
- Shannon Foynes Port was identified as one of the 83 ports/port clusters within Europe under the TEN-T (Trans-European Transport Network) Framework – opportunity to effectively make use of the funding and other support measure that the TEN-T framework will provide. €31.7 billion will be invested between 2014 -2020.
- Expand and increase activity in various sectors e.g. business and shared services, food and tourism.
- Build on existing networks to stimulate interaction between companies and between companies and research institutes.
- Improve productivity and business processes. Forfás published a productivity guide – Boosting Your Company's Productivity – Simple Steps, 2009 to help business in this regard.
- Foreign direct investment since 2007 has been dominated by ICT (manufacturing and services) and medical technology (life sciences) and there is a base of companies, core skills and research institutes in these sectors.
- Sectoral linkages with Galway and Cork that will act as a real driver of development.
- The Region has an availability of natural resources for wind and ocean technology.
- Attract new company start-ups in hub towns and other locations through providing a competitive environment e.g. availability of competitively priced properties, quality business and industrial parks that accommodate mixed-use, serviced offices, car parking, transport networks; broadband, housing, access to skilled labour force, business support etc.
- Development of a European container transhipment hub at Shannon – deep sea port (Shannon/Foynes Port Company commissioned a report which was inconclusive about immediate prospects for such a venture, however should be reviewed in the future particularly in the context of energy related industries.)
- The Mid-West has the highest potential generating capacity of renewable energy in the country.(Source: Eirgrid Grid: A Strategy for the Development of Ireland's Electricity Grid for a Sustainable and Competitive Future, 2009)

3 > THE CHALLENGES

3.5.2 > KEY GROWTH SECTORS FOR THE REGION

Based on a detailed review of the current enterprise base, employment trends in the Region and anticipated development and growth sectors at a national level, it is envisaged that there is scope for job creation and employment growth in a number of key sectors.

The 'Forfás report 'Regional Competitiveness Agenda Volume II - Realising Potential Mid-West' highlighted seven sectors for growth in the Region. The key growth sectors identified were as follows:

Medical Technologies and convergence with ICT: Advances in technologies and an ageing population are driving developments in the Life Sciences sector. Increased technology convergence is stimulating more advanced innovations in product and services.
The Region already has a base of companies, core skills and research institutes in the Medical Technologies and ICT sectors and is well positioned between Galway (companies and research capabilities in the areas of Medical Technologies and ICT) and Cork with (Pharmaceuticals).

The Region already has a base of companies, core skills and research institutes in the Medical Technologies and ICT sector.

Food: The dynamic for the food sector has changed significantly in recent years, transitioning from being largely production-led, to now being led by market demands. People are more focused on a healthier lifestyle and on 'wellness', there is a growing demand for lifestyle related products and health enhancing functional foods.

There are also cross sectoral opportunities e.g. the underpinning sciences, regulatory controls, processing technologies and the need for scientific evidence to underpin medical claims are very similar to those within the pharma and biopharma sectors.

The Region has a strong capability in the food sector and is predominantly made up of companies that are involved in dairy and beef processing, with a small number involved in ingredients. The food sector employs almost 4,000 people directly and has sustained employment at these levels for the past decade.

However, the food sector is facing significant challenges. Irish food producers are also impacted by exchange rate differentials in their major UK markets. The sector needs to increase its value added, diversify its markets and increase productivity to remain competitive in today's challenging economic conditions.

Arrabawn Co-op KERRY

The 2020 Food Harvest Report has set out clear targets for the agri-food, fisheries and forestry sector for 2020. The key targets are:

- To increase the value of primary output in the agriculture, fisheries and forestry sector by €1.5 billion. This represents a 33% increase compared to the 2007-2009 average.
- To increase the value-added in the agri-food, fisheries and wood product sector by €3 billion. This represents a 40% increase compared to 2008.
- To achieve an export target of €12 billion for the sector. This represents a 42% increase compared to the 2007-2009 average.

Farmers play a major role in the food sector. In order to reach these targets farmers in the Region will have need to expand their production, which will provide an opportunity for job creation.

Internationally Traded Services: This sector tends to migrate toward urban areas. The growth trends experienced by Dublin in services are now being replicated in Ireland's main urban centres, including Cork, Galway and to a lesser extent Limerick i.e. GE Capital Services and Banta and indigenous companies such as Avvio.

Advances in technology have enabled the remote delivery of services, and increasing disaggregated supply chain model, providing services which had been formerly managed 'in-house'.

Logistics & Supply Chain Management: The concept of creating an *Agile Logistics Hub (ALH)* in the Region was identified during a regional workshop (facilitated by Forfás) as providing potential. This is largely driven by the existence of the Shannon Airport. This would require that the airport act as a central business district, around which clusters of aviation linked businesses develop, like the proposed Lynxs cargo facility.

Supply Chain Management (SCM) companies in Ireland could develop and manufacture higher margin products, or engage in process design and pilot manufacturing, while at the same time managing the supply process for lower margin goods which may never land in Ireland. Dell was well renowned for its capabilities in SCM and in adding value by managing high-volume assembly activities to deliver products specific to customer needs. The expertise of this workforce in SCM could be leveraged to advantage in the Mid-West.

Energy and Environmental Sector: There are opportunities for the Region in the development of energy related activities. For example the Region is well served with natural assets in wind and wave (Sustainable Energy Ireland's report "Tidal and Current Energy Resources in Ireland). There is also potential for developing a biomass/wood energy sector in the Western region.[35] The Region is also home to the Charles Parsons Initiative (CPI) on Energy and Sustainable Environment is based at UL CPI a merger of six research centres and 30 researchers, focused on researching environment and sustainable forms of energy across the areas of electrochemistry, physics, electronic, mechanical and aeronautical engineering, computer science, maths & statistics.

In March 2010, the Taoiseach announced that Shannon Development, the University of Limerick (UL), the University of Ireland Galway (NUI Galway), and Silicon Valley's Irish Technology Leadership Group (ITLG), had signed a Memorandum of Understanding to establish the Shannon Energy Valley project, a major renewable energy hub in Ireland's Shannon Region.

35 Western Commission, Wood Energy Strategy for the Western Region

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The Shannon Energy Valley initiative will create a national hub for Energy research and development, industry and commerce with a view to attracting international investment and generating high-end employment in the region.

Tourism: Tourism plays a significant role in the economic performance of the Mid-West with approximately 25,000 people employed in over 1,000 tourism businesses across the Region[36].

There has been a significant decline in overseas tourists to the Region over the past number of years e.g. in 2007 close to 1.3 million overseas tourists visited the Shannon Region, this dropped to 770,000 in 2010 with a corresponding -39% decrease in revenue[37]. However, 2011 saw the first increase in overseas tourist visits to the country since 2007 (regional figures for 2011 are not available).

The importance of developing innovative, clear and compelling tourism products and experiences based on the distinctive assets within the region complemented by clear priorities or specific sectors was identified in the Shannon Region Tourism Strategy 2008 - 2010. Recent years have experienced a major shift in travel by holiday-makers from sea to air, brought on by the growth of low-cost carriers. Over 80% of the region's overseas visitors arrived in the region by air (according to Fáilte Ireland data), illustrating the critical importance of Shannon Airport. Route development and international connectivity through Shannon will be vital for tourism in the future.

The Tourism Marketing Fund budget 2010 included additional funding provision for the promotion of the wider Shannon Airport Catchment – Ireland's Wonderful West. A sustained 'smart' marketing initiative is required to market the considerable tourism

The Retail Strategy proposed that substantial new retail floor space and extensions be developed in Limerick City Centre.

Colliers CRE, A Retail Strategy for the Mid-West Region 2010-2016

products and attractions in the Mid-West region. Tourism product innovation is key to the region maintaining and increasing market share.

The Shannon Estuary is one of the region's most important natural assets. There is an opportunity to further utilise the Shannon to help attract more tourists to the Region and subsequently help create jobs.

Other potential sectors for the region: Business Aviation and Aviation Training: Shannon Development identified a number of opportunities for the Shannon Free Zone including: a major business jet centre, dedicated hangers, MRO capability, spare parts of manufacturing and distribution and aviation training (flight operations training, cabin crew training, ground handling and other support services training, as well as air craft maintenance, airport operations and air traffic control training).

Maritime Sector: The Mid-West Task Force Interim Report recognised that a healthy maritime sector is key to the region's competitiveness, given that 98% of international trade is facilitated by seaports. A significant proportion of Ireland's bulk

36 Source: Mid-West Regional Authority, Mid-West Regional Profile 2012
37 Source: Fáilte Ireland, Shannon Region 2010

imports and bulk exports pass through the Region's ports, and their success is vital to the growth of the Mid- West Region's economy.

As mentioned earlier Shannon Foynes Port is the main port in the region. It is a deepwater facility (one of two in the country) catering for all key cargo classifications and has a substantial land bank and large storage facilities. At present, Shannon Development Agency owns a 240 hectare land bank between Tarbert and Ballylongford in North Kerry. The agency has pinpointed this land bank for maritime related industry due to its close proximity to deep, sheltered and navigable waters in the Shannon Estuary[38].

Commercial fishing/ aquaculture: Clare County Development Plan (2011-2017) and Limerick County Development Plan (2010-2016) recognise the role that the fishing industry (commercial fishing, aquaculture, marine culture) has in diversifying the economy of rural areas and providing direct employment and indirectly in processing, production, packaging etc.

Forestry: The Government is committed to developing a strong forestry sector in Ireland and has set a target to increase the national forest estate from 9% to 17% of land cover. County Clare has the largest area of new forests (afforestation) in Ireland and County Tipperary has the fifth largest area.[39]

The forestry sector and related industries such as biomass energy development was highlighted in both the Clare County Development Plan (2011-2017) and Draft Limerick County Development Plan (2010 – 2016) as having a significant potential for job creation and a major role to play in sustainable rural development.

Mining: Limerick County Development Plan (2010 – 2016) and Clare County Development Plan (2011-2017) and North Tipperary County Development Plan 2010-2016 recognise that quarrying and other extractive industries are important to the local rural economic development of the Counties in terms of providing employment and providing raw material to the construction industry.

Lisheen Mines, near Thurles North Tipperary is the largest zinc mine in Europe and employs over 300 people. It is the objective of the Councils' to identify areas containing significant aggregate resources and to safeguard these valuable un-worked deposits for future extraction and to promote the extraction of minerals and aggregates operations where such activities do not have a significant negative impact on the environment or landscape.

Other domestically traded services: Other locally traded services sectors (plumbers, solicitors, hairdressers etc.) are likely to grow as the population increases and the economy improves.

3.6 > STRATEGIC ENVIRONMENTAL ASSESSMENT

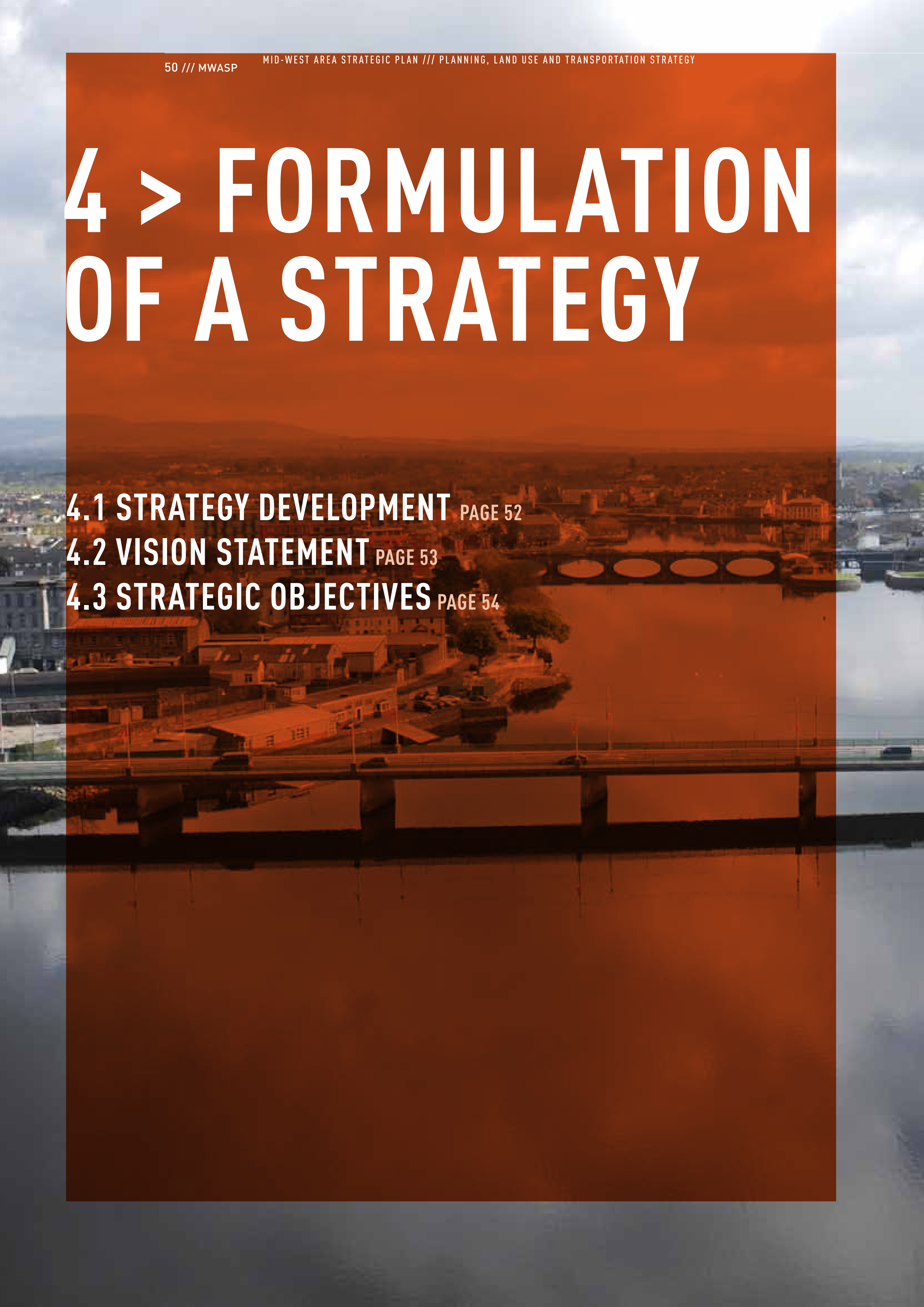
The Mid-West region has a valuable and attractive receiving environment, with particular regard to the high quality biodiversity evident in the area. This is demonstrated by the large number of designated ecological sites (61 Special Areas of Conservation, 14 Special Protection Areas, 30 Natural Heritage Areas and 125 proposed Natural Heritage Areas) and the location of a number of, nature reserves and the Burren National Park within the region.

In addition there is a rich archaeological and architectural heritage evident in the region, which is particularly note-worthy in the Limerick City Area.

The River Shannon is one of the most important waterways in Ireland and has significant value form an environmental point of view due its ecological value (Lower Shannon Special Area of Conservation), and its importance as a recreational resource and a source of fresh water.

The Strategic Environmental Assessment (SEA) is a formal, systematic evaluation of the likely significant impacts on the receiving environment and has been a key process in the development of the MWASP strategies to ensure sustainable future growth without causing a significant degradation of the sensitive and valuable receiving environment in the Mid-West region.

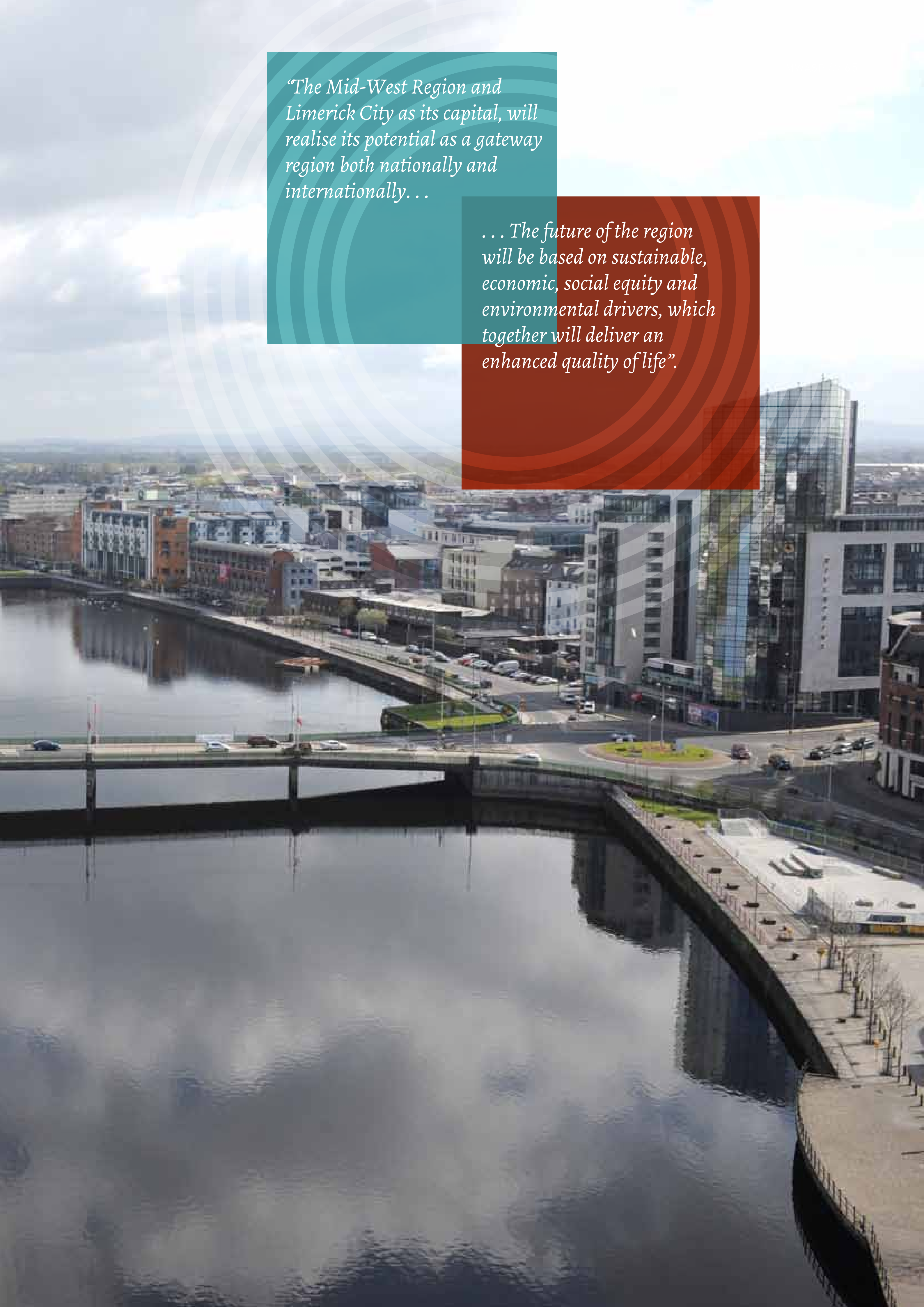
38 Source: Mid-West Regional Authority, Mid-West Regional Authority Profile 2012
39 Source: Forest Service, 2009



4 > FORMULATION OF A STRATEGY

"The Mid-West Region and Limerick City as its capital, will realise its potential as a gateway region both nationally and internationally. . .

. . . The future of the region will be based on sustainable, economic, social equity and environmental drivers, which together will deliver an enhanced quality of life".



4 > FORMULATION OF A STRATEGY

4.1 > STRATEGY DEVELOPMENT

The preparation of the MWASP strategy is closely informed by national, regional and local policy. In particular, the NSS, the RPGs, the Atlantic Gateways Initiative, Smarter Travel, existing Mid-West Local Authority plans and reports produced by Forfás and the Mid-West Task force have strongly influenced the development of the strategy. The 2010 Planning & Development (Amendment) Act highlights the need for plans to be consistent with national and regional policy. These sources provided the overall direction of the strategy, emphasising the need to promote more balanced, equitable and sustainable patterns of development.

Within this context, extensive research and analysis of the region was carried out in conjunction with the Local and Regional Authorities and relevant Central Government Departments. This work focused on patterns of demographic and land use change, the economic structure, and transportation in the Mid-West. This provided an evidenced-based platform from which to develop the strategy. The findings of this assessment strongly support existing strategic policy. This correlation informed the emerging land-use spatial strategy.

The development of MWASP focused on patterns of demographic and land use change, the economic structure, and transportation in the Mid-West. This provided an evidenced-based platform from which to develop the strategy.

Aligned with the land-use spatial strategy, the use of population targets is a key determinant in finding a sustainable balance to the distribution of future development and investment across the region. A number of development scenarios were assessed which reflected the range of long-term outlooks for population increase provided by the Central Statistics Office (CSO), DoECLG and RPGs. The RPGs targets for the period 2010 to 2022 were agreed as the most appropriate targets for that period. A number of scenarios were also assessed for the remaining years of the Plan, 2022 to 2030 against sustainable transport policy objectives. From these, three scenarios were selected for further evaluation and testing which represented high, medium and low growth options. This spread reflected the current economic uncertainty and traditional dependence of the region on in-migration. From these scenarios, the use of the medium growth scenario was used as the basis for the preferred scenario. In the context of the RPG targets, this provided the most appropriate basis for the formulation of the MWASP Strategy to ensure that infrastructural deficits are avoided and that public and private investment is focused to maximise returns for the entire region. Notwithstanding the above approach, as the RPGs are reviewed into the future and informed with regard to national and regional population targets, MWASP will align with the revised RPG figures.

Although ambitious the population targets set the horizon platform to which the region must develop and aspire to. Should they not be reached within the timeframe of the strategy, 20 years, the primary fundamentals of change required and direction needed are still viable pointers to achieving future success and sustainability. Using secondary research including: CSO statistics (Census 2006, Quarterly National Household Survey, PoWCAR etc.); ESRI, details on agency supports employments (IDA, Shannon Development, Enterprise Ireland) a profile of the current employment and business base was produced including a SWOT analysis of the Mid-West Region (Section 3.5.1.1). This analysis highlighted the economic strengths, weaknesses, opportunities and threats pertaining to the Mid-West Region. The SWOT analysis formed a fundamental input into shaping the economic strategy for the Region.

Based on the above review, the key strategic economic objectives for the Region have been identified, Section 4.3. Potential growth sectors for the Region are profiled in Section 3.5.2 and outcomes highlighted the likely locations for growth based on the findings from:

- profile of the current employment and business base,
- the review of current studies and plans
- business location trends e.g. internationally traded services tend to migrate towards urban areas and forestry, mining and commercial fishing will develop in rural areas etc.
- a profile of the population based on the Department of Environment, Community and Local Government (DoECLG) estimated population growth,
- labour force participation rates, projected unemployment rates and the projected increase in jobs in the Mid-West Region.

Following the above steps a list of key recommendations deemed critical to developing enterprise and the economy in the Mid-West Region are set out in the following chapters.

4.2 > VISION STATEMENT

Within this context, a vision statement has been prepared which influences the overall Strategy. It states:

The Mid-West Region and Limerick City as its capital, will realise its potential as a gateway region both nationally and internationally.

The future of the region will be based on sustainable, economic, social equity and environmental drivers, which together will deliver an enhanced quality of life.

Realisation of this vision will provide citizens with a variety of employment and educational opportunities, amenities and cultural facilities.

The Plan must deliver the key components of the vision. The main thrust of the strategy is to promote the co-location of employment and population in strategic locations, in-order to provide cost-effective public transport travel times, and an enhanced quality of life.

4 > FORMULATION OF A STRATEGY

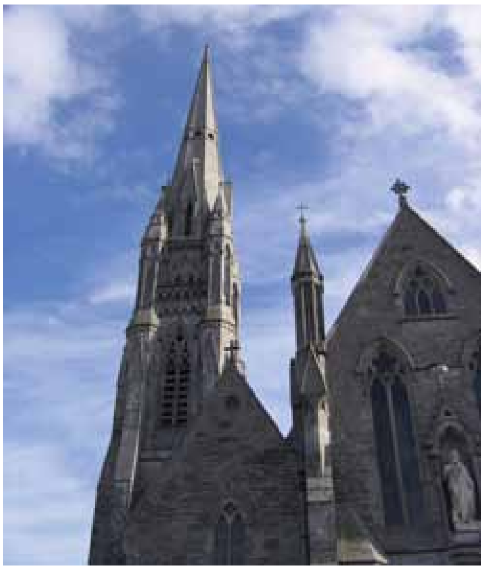
A focus on Limerick City Centre and its public realm and the regeneration of existing specific areas will help create a vibrant and strong metropolitan area that will be the economic driver of the region. Certain central parts of the city and particular settlements elsewhere in the region will emerge as the preferred location for investment and sustainable development.

The clearer distinction of roles for the city, towns and rural areas will allow for more efficient use of existing infrastructure. It will also allow for complimentary, non-competing roles to be developed with particular functions established. In this way the environmental and cultural qualities of the region can be protected from inappropriate development. The location of population with employment and service opportunities allows for a more efficient use of public transport and a compact and sustainable urban form. Levels of social inclusion and quality of life can increase.

4.3 > STRATEGIC OBJECTIVES

Distilling national and regional policy in the context of the specific challenges facing the region provides the following objectives with which to implement the Strategic Plan and achieve the strategy Vision:

- Sustainability – Development will be located in areas which maximises use of infrastructural investment and public transport and reduces the need to use the motor car:
- Priority – Prioritise investment and development opportunities in areas with the most potential for accelerated benefits for the entire region and in line with the proposed settlement hierarchy
- Balance – The focussing of development is not to the detriment of other areas in the region, but is in proportion to the traditional and emerging roles of each;
- Inclusion – Provide parity of access to social, employment and educational opportunities so as to reduce spatial inequalities and areas of deprivation;
- Cooperation – Provide a platform for the coordinated implementation of spatial, sectoral and investment strategies.



The Regional Planning Guidelines 2010-2022, set out a clear vision for the area. As part of the vision a number of objectives in relation to the economic development of the region were set:

- That Limerick/Ennis/Shannon should be developed in a co-ordinated way as a single integrated urban agglomeration that acts as the core driver of the region and a principal mechanism for attracting inward investment into the area.
- The City core of this area would develop as a vibrant, multipurpose zone, with a population of a size capable of supporting a high level of social and commercial activity.
- That, overall, the Mid-West Region and in particularly Limerick/Shannon/Ennis would be linked and integrated with the

Galway and Cork areas in particular, creating a critical mass to attract investment and activity on a competitive basis.
- That the economic development of the Region would be promoted through the development of the social, economic and physical infrastructure demanded by foreign and indigenous industry and that, in particular, the education and research resources of the Region be integrated with the needs of industry.
- That each of the peripheral areas of the region develop their own key service centres, encouraging enterprise development, and providing a significant level of social, commercial and community services to the local hinterland, as well as acting as a base for high quality transport links to the core area of the region.
- That the new enterprise sectors be developed.
- That the natural resources of the region be managed and developed so that their economic and social potential be realised while sustaining, protecting and enhancing environmental quality and the quality of the region's heritage.
- That the high potential of the region for the provision of renewable energy and other green technologies be harnessed to the benefit of the economy and the environment alike.

Allied to the objectives set out in the Regional Planning Guidelines, the economic strategy for the Region has a number of key objectives including:
- Ensuring that a the Region has a geographically balanced sustainable economic base;
- Sustainable rural economic development throughout the Region;
- Ensuring a diverse economic base across a wide range of high value-added economic activities in foreign and indigenous owned internationally traded services and export led goods in order to minimises the risks of relying on any one sector, or a limited number of potentially vulnerable sectors;
- Aligning the location of jobs with the current and projected population, so as to optimise the usage of existing and proposed infrastructure and minimise unsustainable commuting patterns;
- Stimulating the growth of current enterprises;

- Promoting economic growth and inward investment;
- Enhancing those areas where the Region has underperformed:
- Enhancing sectors where the region has a competitive advantage:
- Providing a labour and skill base through education and training which is aligned with the requirements of foreign and indigenous enterprises in the Region; and
- Addressing specific issues in terms of high unemployment and social exclusion.

While planning and other policies will assist in ensuring the future development needs are planned for in a strategic and co-ordinated manner and that infrastructural requirements are in place such as transport infrastructure, quality broadband as well as access to educated and skilled workforce etc., the actual employment level will be determined by:
- International and national economic and market forces.
- The commercial decisions of new foreign and indigenous investors.
- The viability and growth of existing business and other employers.
- The mix of economic activity in the region i.e. higher skilled, higher income activity tends to be less employment intensive.

5 > THE STRATEGY

A growth scenario for the period from 2022 to 2030 has been established and a realistic target population of 500,000 for the region has been set.

Priority will be given to infrastructural investments which fulfil the delivery of the Development Clusters.

Shannon Airport/ Free Zone is identified as one of the prime areas in the region for indigenous and international investment

5 > THE STRATEGY

In order to develop the region to reach its potential a single population growth scenario was utilised that simulates that of the Mid-West RPGs from 2010-2022 and a lesser growth to 2030. The economic, settlement, environment and transportation elements of the strategy were developed in a cohesive fashion to provide a comprehensive evidence based Plan.

The Plan was tested with an identified hierarchy of settlement and employment dispersal. A number of scenario tests were undertaken using a multi-modal transport model to establish the sustainability of the settlement pattern and ascertain the potential of a public transport system to serve the needs of the region.

The Plan also provides consistency between the Strategy policies and those of the NSS, RPGs and Smarter Travel and is essential in strengthening the link between national, regional and local policy. In this regard, the MWASP Strategy is based on the following strategic policies:

Settlement
- To integrate the location of key land uses with the highest level of access by public transport, cycling and walking.
- Improving quality of life and accessibility to transport for all and, in particular, for people with reduced mobility and those who may experience isolation due to lack of transport
- The promotion of key infrastructural investments in locations that can successfully accommodate significant development
- The revitalisation of Limerick City Centre as a key component in the economic competitiveness of the region and the heart of a strong and vibrant city.
- To identify types and levels of development that are appropriate to the function of the Gateway, Hub, strategic towns, villages and rural areas
- The reduction of overall travel demand and commuting distances travelled by the private car

Environment
- To protect the landscape, ecologically sensitive areas and the cultural and built heritage of the region from inappropriate development that is unsustainable.
- Minimise the negative impacts of transport on the local and global environment through reducing localised air pollutants and greenhouse gas emissions
- Improve security of energy supply by reducing dependency on imported fossil fuels.

Employment
- To locate major employment centres close to proposed settlements that are accessible

by the most sustainable and efficient means.
- Improve economic competitiveness through maximising the efficiency of the transport system and alleviating congestion and infrastructural bottlenecks
- The identification and location of employment opportunities that will enhance the economic performance of the region, utilising existing infrastructure
- To provide a sustainable and efficient public transport system for the City Region and identify key infrastructure needed to serve the needs of the region in an efficient and economic manner.
- To support sustainable settlement patterns throughout the region with a variety of interventions appropriate to function and location.

Core Strategies
The implementation of the MWASP settlement hierarchy will be carried out via the Core Strategies of each planning authority in the Mid-West. These will provide the basis for the distribution of population growth in each county and subsequent demand for transport. In order to integrate land use planning and transport in the Mid-West, it is important that the implementation and monitoring of MWASP is done in conjunction with the Core Strategies of North Tipperary, Clare and Limerick.

5.1 > POPULATION TARGETS

Population targets have been set in the RPGs for key zones and settlements in the region. These are refined in the strategy and projections to 2030. The establishment of targets allows for the prioritisation of investment in services, transport and employment. The implementation of these national and regional targets ensures that there is adequate investment in infrastructure to provide for economic growth. The targets are therefore seen as indicators of a spatial intent for the region. They are detailed in Figure 5.1 below. Limerick Metropolitan City comprises the existing city and suburbs. This new entity is then divided between the central area and the suburbs. Development clusters which will accommodate growth at various locations are shown in Figure 5.3.

Table 5.1: Population Targets for the Mid-West Region to 2030

PREFERRED SCENARIO	GROWTH 2011	GROWTH TO 2015	GROWTH 2016-2020	GROWTH 2021-2030	POPULATION TARGETS 2030
MID-WEST REGION	**379,327**	**33,000**	**33,250**	**54,550**	**c. 500,000**
LIMERICK METROPOLITAN CITY	**91,454**	**10,250**	**13,200**	**24,900**	**139,800**
Limerick City	*57,106*	*7,000*	*10,200*	*19,500*	*93,800*
Limerick Suburban	*34,348*	*3,250*	*3,000*	*5,400*	*46,000*
Ennis	**24,018**	**3,750**	**2,500**	**7,250**	**37,500**
Shannon	**9,305**	**1,250**	**1,900**	**2,500**	**15,000**
Nenagh	**8,036**	**750**	**750**	**3,500**	**13,000**
Newcastle West	**6,002**	**1,500**	**1,500**	**3,000**	**12,000**
Thurles	**7,545**	**1,000**	**1,000**	**1,800**	**11,300**
Roscrea	**5,201**	**7,750**	**650**	**1,000**	**7,600**
Rural Economic Nodes	**16,181**	**3,750**	**1,750**	**4,700**	**26,400**
Remaining Areas	**211,585**	**10,000**	**10,000**	**5,900**	**237,400**

Source: CSO 2011

A growth scenario for the period from 2022 to 2030 has been established and a more realistic target population of 500,000 for the region has been set.

Table 5.1 sets out indicative population growth targets for the Mid-West over the period 2010 to 2030. The targets are broadly consistent with the Regional Planning Guidelines 2010 to 2022. The 2011 Census results indicate the Mid-West population at 379,327, which are in line with projection targets.

Beyond the RPGs 2022 to 2030
Population targets for the regional settlement hierarchy to 2022 have been set by the DoECLG and RPGs.

While actual population increase exceeded population projections up to 2008, this has changed in the current economic climate. In light of this, the DoECLG and RPGs revised the preferred 2022 population target for the region downward from 475,000 to 462,300. It is acknowledged that there is potential for patterns of population change to alternate from 2010 to 2030 under the influence of economic and population cycles. However, in line with the DoECLG revisions it is considered prudent to take a more conservative approach over the long term.

Projecting the trends on which the RPG targets are based would provide for a 2030 regional population target of approximately 525,000. To take account of the more uncertain outlook, it was considered appropriate to apply the RPG targets to 2022 and then provide high (525,000), medium (500,000) and low (462,000) targets for the final phase of the MWASP. From this range, and based on:

- the uncertainty of the short and medium term economic outlook;
- current high out-migration;
- recent decrease in demand for and reported over-supply of housing units;
- the dependence on sanctioning and prioritisation of investment in achieving targets

The medium growth scenario has been selected as the preferred scenario for the region. This provides for a target population in the order of 500,000 persons by 2030. The requirements of the region in terms of infrastructure, servicing and land were modelled and tested at the upper population target (525,000). While it is considered that the upper target can and may ultimately be achieved over the longer term, the target for the region should be reviewed in light of periodic reassessment of the region and the RPGs and the target should be adjusted to the lower or higher figure accordingly.

The locations for development set out in the settlement strategy are the most appropriate locations in which to focus development in order to achieve the objectives of the Plan. The 2030 target reflects a trend of strong, but more moderate population increase over the long term. Should population trends change, the MWASP higher or lower targets will continue to support the appropriate relative growth of settlements within the hierarchy. In this way, the MWASP seeks to support the spatial strategy and settlement hierarchy set out by the RPGs to 2030 in each of the high, medium and low scenarios.

These targets have been provided within, and remain broadly consistent with, the RPG framework and reflect the potential of these centres to serve the increased population of the region to 2030. However, in light of the relatively small population increase provided by Phase 1 of the Regeneration Programme it was decided to moderate the population target for the Gateway over the short term (to 2015) below that provided by the RPGs. This was necessary due to the importance of the Regeneration Programme in achieving population targets for the City and the need to support the development of Central Limerick relative to Suburban Limerick. It should be noted, that the 2015 MWASP target for the Gateway is consistent with the DoECLG minimum target. It should also be noted that over the medium term (2015 to 2020), the MWASP targets for the Gateway return to levels consistent with the RPGs. Population reviews should be undertaken periodically.

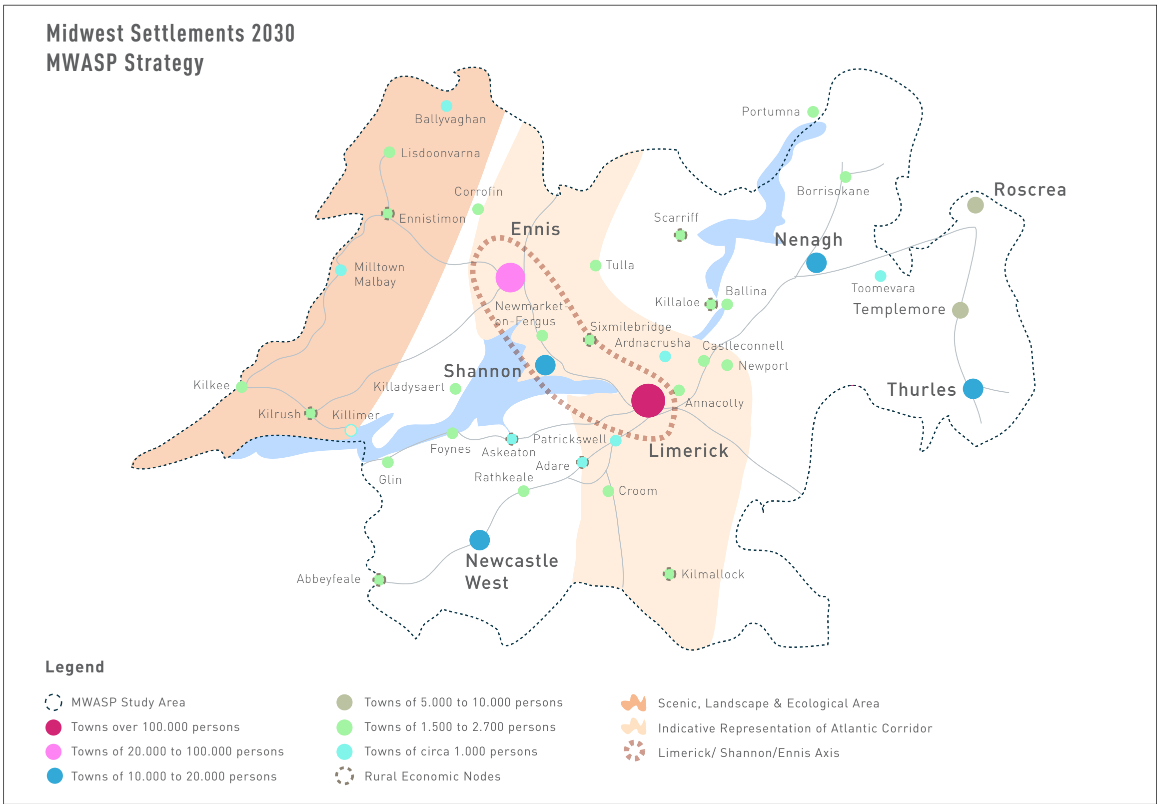
5.2 > SPATIAL STRATEGY

Derived from the Strategic Objectives and the main Strategy, the key concepts of the Spatial Strategy are:

1. Establishment of residential/employment clusters in Limerick city;
2. Revitalisation of the City Centre;
3. Establishment of key settlements throughout the Region;
4. Maintenance of the rural economy and population base;
5. Protection of countryside and environmentally sensitive areas.

In line with the NSS and RPGs, the MWASP spatial strategy seeks to prioritise the development of high potential, strategically located centres. The rapid development of such centres will enable the emergence of higher order services, facilities and infrastructure as well as improved access to same for the entire region. In this way, the Plan recognises the interrelationship of rural and urban areas. While the Plan focuses on the development and integration of specific centres, the spatial strategy and settlement hierarchy have been designed to promote the integration and mutual support of rural areas, villages, towns and the Metropolitan Area (City and Suburbs). However, the focus of the Plan is the development of the Limerick / Shannon / Ennis axis as the engine and core of the region. The Gateway must attain a critical mass of population with over 30% of the Region total. This must be the focus for the immediate future with attendant levels of commercial development in the central area of the city. The wider Settlement Hierarchy is set out diagrammatically below:

Figure 5.1: The Mid-West Area Strategic Plan Settlement Hierarchy



5 > THE STRATEGY

The RPGs have as part of the Settlement Hierarchy Strategy identified 8 sub zones which reflect the status and character of the respective zones.

Zone 1 – Which encompasses, Limerick/ Shannon/Ennis to Nenagh has been designated by the RPG as the economic engine of the region, and forms the Gateway/ Hub of the Mid-West, as designated in the NSS.

Zone 1 is the focus for major urban settlement, infrastructure and economic investment, employment, education, social, cultural and recreational provision which will act as the catalyst for the development of the Mid-West Region.

The remaining zones 2-8 are more peripherally located but form significant parts of the region, serving the wider needs of the urban & rural communities of the Mid-West.

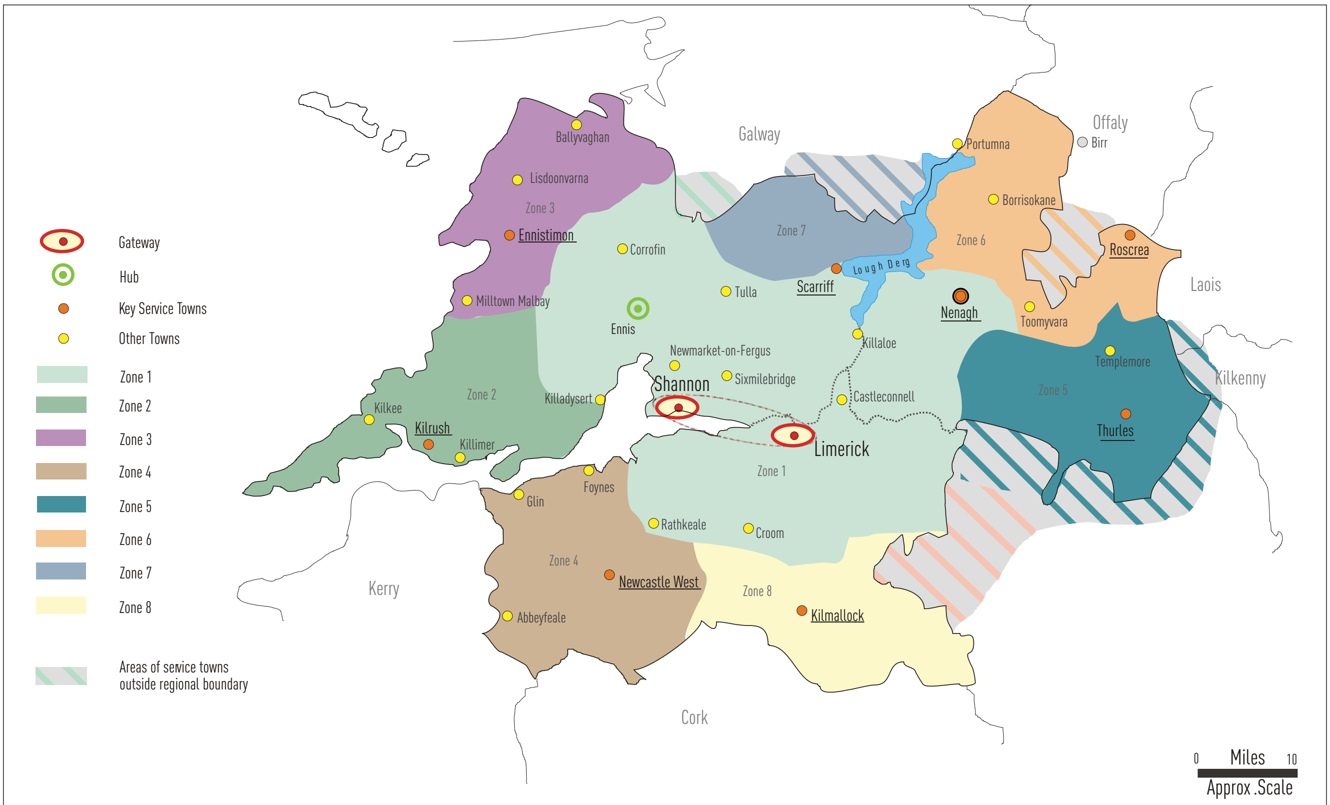
To support the overall spatial strategy and settlement hierarchy established by the RPGs it is considered necessary to specify objectives for a number of key locations:

Metropolitan Limerick
The settlement strategy identifies the built up area of the city and suburbs as one entity. It calls it the Metropolitan City. A population target is provided for the Metropolitan City which is divided between 'Limerick Central' and 'Limerick Suburban'. These locations will accommodate the majority of population and employment opportunities in the region. These targets are consistent with the RPGs and emphasise the need to:

- Support the regeneration of Limerick City Centre including the growth in employment;
- Rebalance population growth within the Metropolitan City in favour of the central area.

The targets for Limerick Central will be achieved by the intensification of development within the City Centre and the focussed redevelopment of the Regeneration Areas and the Dock Road area. The targets for Limerick Suburban will be achieved by focussing development in the Dooradoyle, Castletroy and Caherdavin areas.

Figure 5.2: Mid-West RPGs 2010-2022 Settlement Strategy Diagram



Development Clusters
In the Metropolitan area, development will be focussed at the locations set out above. However, these locations will be integrated through the building of strategic development clusters for both residential and employment which will be strategically located around the Metropolitan City. Each will contain a range of employment and residential uses and will all be linked by public transport. These will be located at:

- Caherdavin/Moyross;
- Docklands/City Centre;
- Dooradoyle/Raheen;
- Castletroy/Plassey;
- Southill/Ballysimon

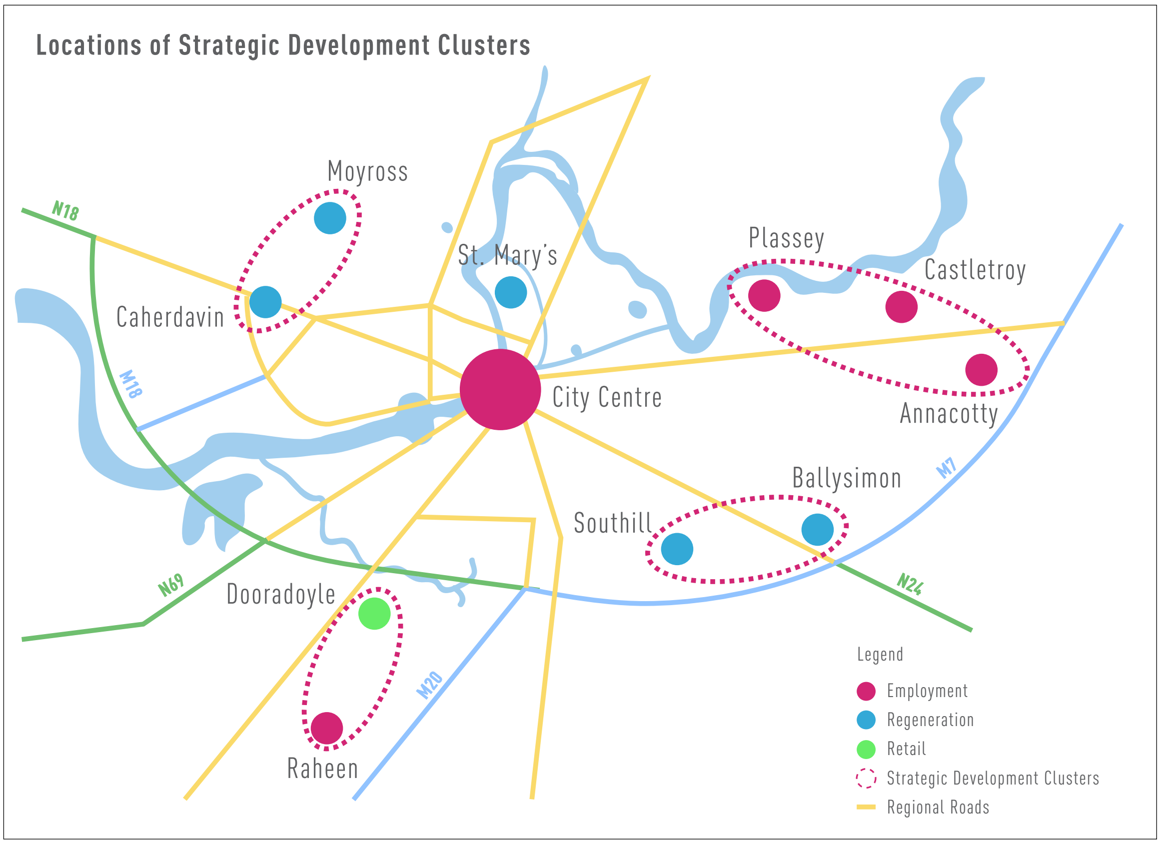
The potential for each cluster to provide employment and residential uses will be explored in a series of Local Area Plans to be based on a new public transport system for the Metropolitan City and the need to provide high levels of connectivity and permeability in and between each area. The size of each cluster will encourage the provision of cycle and pedestrian routes.

It is envisaged that the capacity of these clusters will allow for the Metropolitan area to develop to a population of c.140,000 by 2030, with attendant levels of employment and services. Priority will be given to infrastructural investments which fulfil the development of these clusters.

In addition to the above, as included in Clare County Council Development Plan 2011-2017, there may also be potential in developing Burlington. However, this potential will also need to be investigated further by undertaking a detailed local area plan study which must consider the options and connectivity of the area.

Priority will be given to infrastructural investments which fulfil the delivery of the Development Clusters.

Figure 5.3: Limerick Metropolitan Area Strategic Development Clusters



5 > THE STRATEGY

Whilst the City Centre will accommodate additional population and employment, its historic fabric must be protected. The physical fabric and public realm in the City Centre will be improved through reduction in traffic volumes and parking constraints will allow the public realm of the City Centre to be enhanced. The focus and concentration of higher order shopping and cultural/tourism uses with increased levels of investment will allow for improvements to the physical fabric of the City. A greater consideration is required of planning for the Metropolitan Area which will enhance the role of the City Centre with balanced development of the suburbs.

Shannon

The role of Shannon is recognised in the NSS and RPGs as being an important location lying between Limerick/Ennis/Galway, which forms part of the Atlantic Corridor. Whilst Shannon forms part of the Limerick/Shannon Gateway it serves a wider function as one of the major employment and residential nodes in the region. Due to its linked Gateway status in terms of the NSS and its position adjacent to the Shannon Estuary, Shannon International Airport, and Shannon Industrial Free Zones, and the M18 Freeway, this town constitutes a major settlement area in the RPG hierarchy and an important engine for balanced economic growth of the region.

Shannon Free Zone currently provides employment for c.6,500 people with almost 10,000 employed in the wider Shannon area i.e. Shannon Frees Zone, Smithstown, Airport and Shannon Town.

For the Shannon Free Zone, Manufacturing, International Trade Services, Aviation, Tourism, and Logistics services provides much of the employment opportunities. New development opportunities in freight handling, USA Customs Clearance, high end manufacturing and Aviation Training and Maintenance offer potential gains for rapid growth in the Shannon and Environs areas, and improved competitiveness for the Gateway Region.

It is anticipated that this vibrant settlement will over the short to medium term provide an enhanced role for Shannon, and that additional population and residential settlement will be attracted to the area. The population level proposed for the town in the strategy is greater than previous targets. This will create a more vibrant settlement that contributes in a more sustainable way to the performance of the gateway. Shannon has the potential to grow significantly over the period of the strategy providing an international entry to the Atlantic Corridor with excellent air, road and rail linkages.

A new Local Area Plan is planned to be provided for Shannon and Environs Area which it is envisaged will provide further guidance and policy for the future integration and development of the area. Such development will have implications for future infrastructure and development, including Rail, Road, Water Services and Broadband services.

As part of the Gateway the population levels in Shannon should increase to achieve a better balance between existing employment levels and resident population levels.

Ennis
Ennis has grown substantially in the last inter-censual periods. Its capacity for development in a compact form is great. This is due to its historic structure and recent pattern of development. The continuation of these will create a balanced centre for the development of employment and residential opportunities.

Over the long term, the strategy proposes a role for Ennis greater than that previously considered. Such organic growth should be maintained. It is strategically located on the Atlantic Corridor between Limerick and Galway and it is linked to each by high capacity road and rail systems. It is in close proximity to Shannon Airport. It is also in an important location relative to extensive rural areas in Clare and along the west coast. In this way, it has potential to help reduce the peripheralisation of parts of the region that are distant from the Gateway.

As such, it is has significant potential as a residential, employment, services and infrastructure node. A new plan that provides for its enhanced residential and employment role will deliver a sustainable centre of great benefit for the region. Accordingly, it was considered important to provide specific objectives for Ennis. In establishing targets for Ennis, it was considered necessary to provide for this enhanced role for the Hub which will emerge over the long term. This enhanced role will remain consistent with the hierarchy envisaged by the RPGs but will have implications for how Ennis relates to the Gateway in the context of its future size, range of services and facilities and infrastructure.

Newcastle West
NCW is strategically located but a distance from the Gateway. It is central to a hinterland and will have an important role to play in supporting the rural population base as a service centre. Potential also exists for it to perform as a node for public transport services to the city. NCW should be planned to operate in tandem with Rathkeale and Abbeyfeale.

Nenagh
It is considered important to provide specific longer-term population growth targets for Nenagh. The town's location within an important national transportation corridor will allow it to act as a local centre for the provision of services and employment. It will also function as a key transport node for the hinterland and provide transport links to the Gateway. It has the potential to act as a support centre providing complementary services to industry and commerce in the Limerick/Shannon Gateway. Nenagh will also provide retail services and act as a tourism base for the area.

Thurles
Thurles is a designated service centre with the potential to act as a base for indigenous industry and attract investment with transport links to Cork and Dublin. It will also act as a tourist base for the area. Potential exists for it to be a centre for alternative agriculture development, including food, afforestation and renewable energy. The Thurles /Templemore/ Roscrea corridor is an important part of a more extensive economic corridor that links Athlone/Portlaoise with Clonmel/Waterford/Rosslare

Rural Areas
Alongside the need to enhance the role of the city there is and will remain a sizeable rural population in the region. The key to the sustainable development of these areas is to provide and maintain a network of local centres that provide a range and level of services appropriate to their size. High order facilities and services remain in the city.
The management of urban generated rural development is key to allowing local centres to realise their potential and to reduce the need to travel long distances by car. Continuation of a dispersed settlement pattern outside the proposed hierarchy will militate against the provision of viable public transport systems.

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The spatial strategy for the Region will support the rural economy by the establishment of a hierarchy of local centres providing a range and level of service proportionate to their hinterland. Newcastle West, Nenagh, Thurles and Roscrea, while performing as development centres in their own right will also act as engines of growth in their surrounding hinterlands.

This in turn will support and be supported by the provision of an appropriate level of employment opportunities and services in a number of smaller settlements strategically located throughout the region.

Rural Economic Nodes
A number of rural economic nodes have been identified in the region having regard to geographical factors, their relative size and the existence of a rural hinterland.

Population targets for a number of 'Rural Economic Nodes' (REN) are also provided. These centres have strategic locations within relatively densely populated rural areas. The REN category includes Kilrush, Scarriff, Ennistymon and Kilmallock; these settlements are Key Service Centres in the RPGs. The REN category also includes Templemore, Abbeyfeale, Sixmilebridge, Adare and Askeaton. The REN's are essential to the success of the MWASP strategy as they will act as focal points linking rural areas and larger urban centres. In this regard it is envisaged that Newcastle West will function in synergy with Rathkeale and Abbeyfeale.

These centres are identified for infrastructural investments and protected from inappropriate or unsustainable developments in their hinterlands which will undermine their role.

Protection of the Environment and Rural Settlements
With a focus on the settlement hierarchy identified, it is important that infrastructural investments made therein are not diluted by developments elsewhere. Notwithstanding this, support for genuine rural housing needs which sustain rural communities is necessary. However, urban generated development in rural areas must be controlled. The erosion of the countryside, scenic areas and heritage sites can be reduced if development is focused on identified settlements. The provision of services will be channelled and prioritised into identified settlements. Save for instances of genuine housing need and indigenous enterprise development should focus on the range of settlements identified so that the countryside can be protected.

5.3 > ECONOMIC STRATEGY

5.3.1 > KEY GROWTH SECTORS FOR THE REGION

Based on a detailed review of the current enterprise base, employment trends in the Region and anticipated development and growth sectors at a national level, it is envisaged that there is scope for employment growth in the international and national traded services sector and to a lesser extent in high-end manufacturing.

The 'Forfás report 'Regional Competitiveness Agenda Volume II - Realising Potential Mid-West' highlighted seven sectors for growth in the Region including: medical technologies and convergence with ICT; food; internationally traded services; logistics & supply chain management; energy and environmental sector and tourism:
Other potential sectors for the region retail (for certain areas as set out in the Mid-West Region 2010 – 2016 was carried out by Colliers CRE) forestry, tourism, renewable energy, commercial fishing/aquaculture and mining (as highlighted in several of the County Development Plans), other domestically traded services which are likely to grow as the population increases and the economy improves. As highlighted in various reports the main development opportunities are somewhat location specific.

It is the role of the various agencies to build on established clusters of economic activity in each area and use them as platforms for growth. Certain towns have strong clusters such as ICT companies at Shannon and the Castletroy/ Plassey/ Annacotty.

5.3.2 > KEY STRATEGY RECOMMENDATIONS FOR THE REGION

A review the following data and information was undertaken:

- The current employment and business base in the Region;
- The identified potential growth sectors and
- A number of regional development plans.

This review led to the development a set of key recommendations deemed critical to developing enterprise and the economy in the Mid-West Region. These are set out in Figure 5.4 below described in detail under recommendations 1 – 10.

Table 5.2: Likely Locations for the Potential Growth Sectors

KEY SECTORS	MEDICAL TECHNOLOGIES & CONVERGENCE WITH ICT	INFORMATION & COMMUNICATIONS TECHNOLOGY	FOOD	INTERNATIONALLY TRADED SERVICES	LOGISTICS & SUPPLY CHAIN MANAGEMENT	ENERGY RELATED ACTIVITIES	TOURISM	BUSINESS AVIATION & TRAINING	MARITIME	FORESTRY/ MINING/ COMMERCIAL FISHING & AQUACULTURE	OTHER DOMESTICALLY TRADED SERVICES
Limerick City				✔	✔		✔		✔		✔
Raheen/ Dooradoyle	✔	✔		✔							✔
Castletroy/Plassey/Annacotty	✔	✔		✔							✔
Newcastle West			✔								✔
Shannon	✔	✔		✔	✔			✔	✔		✔
Ennis							✔				✔
Nenagh			✔				✔				✔
Thurles			✔				✔				✔
Roscrea			✔				✔				✔
Rural development nodes			✔				✔		✔		✔
Rest of the Mid-West Region *(inc. other key employment clusters)*			✔			✔	✔		✔	✔	✔

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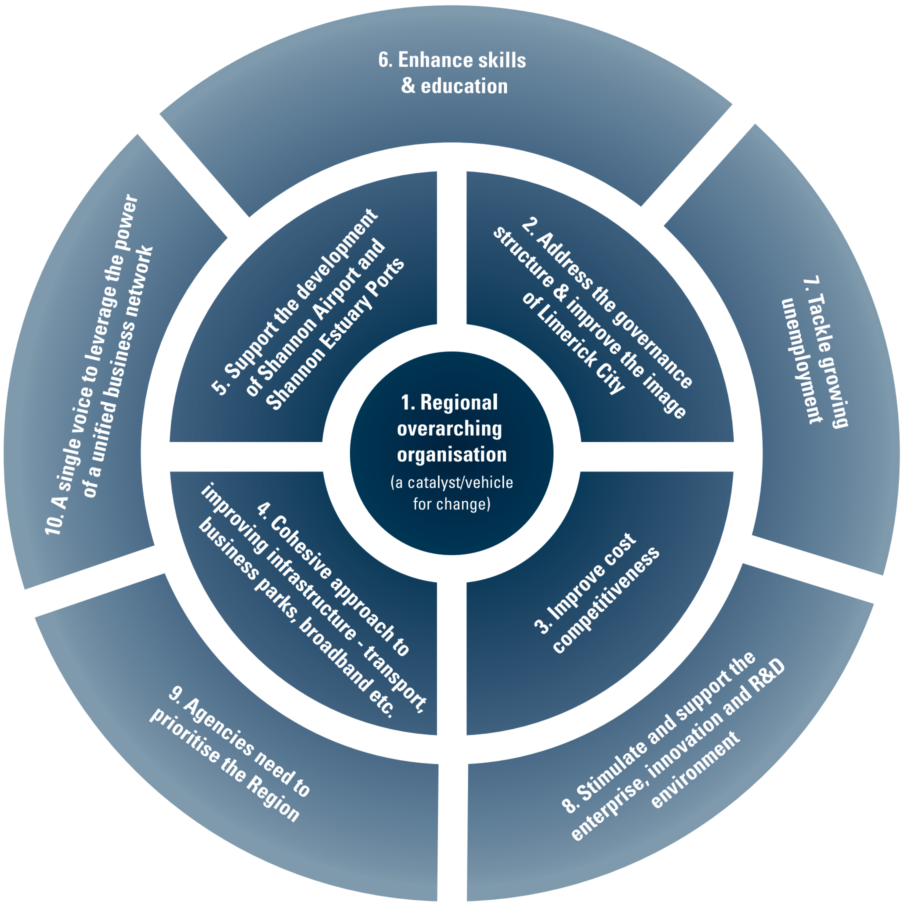
Key plans for the Region were recently prepared by the Mid-West Task Force (Interim Report, 2009) and Forfás (Regional Competitiveness Agenda, Volume II, Realising Potential: Mid-West, 2010). The plans provide the essence of a strategic development roadmap for the Mid-West region. Both plans made clear recommendations that are relatively consistent, in terms of the broad strategic direction, priorities and steps that must be taken for the Region to achieve its economic potential. The principal priorities and steps have been captured in the recommendations below.

Figure 5.4: Strategic Direction for Mid-West Region



1. To develop a smarter integrated regional approach
At the core of the region must be a cooperative and integrated approach that sites an overarching vision for each of the regions public bodies. With the assistance of the Regional Authority the Local Authorities must be focused towards achieving a unified cooperative drive to aid development and change. This approach should have:

- A distinct, unified vision for the Region with Limerick City/Shannon Gateway at the heart of the vision;
- A willingness to ensure alignment of all local authority policies with the single regional vision.
- A strategic approach to attracting the maximum possible of scarce national and EU public and private sector funding.

2. To improve the image of Limerick City and the Mid-West
Research consistently demonstrates that cities are the focus for activity of a Region; they lead recovery and drive the well-being of regions and nations. It is also national and regional policy. Therefore, in order for the Mid-West Region to prosper it is critical that the image, development and marketing of Limerick City, as a priority, and the Mid-West Region, in general, needs to be addressed. In this regard, MWASP supports the vision

and policies for the regeneration of Limerick City to improve and revitalise central areas and generate residential and employment generating uses therein.

The National Competitiveness Council highlighted that given the central role that cities play in driving national competitiveness that *"the re-prioritisation of capital expenditure should focus resources on their development*[41]*."*

Developing a clear vision and internal management capabilities allows a city to prioritise, invest in and strategically manage the building blocks or 'capitals' needed by any city for long-term prosperity – social, environmental, cultural, intellectual, infrastructural, ICT and political participation capitals. By putting in place and implementing the appropriate policies, Limerick could better maximise its investment in those capitals which are most relevant to its strategic vision, while optimising its investment in those capitals which are less relevant. This approach will help to better sell the region as being more in tune with its relevant needs and streamline its progressive growth.

"The more well-balanced a city is for both business and residents, the better it will fare[42]*."*

There have been a number of positive developments for Limerick City over the past number of years e.g.:

- Its designation as the European City of Sport in 2011.
- An Economic Development Committee representing both Limerick local authorities and chaired by Shannon Development was formed.
- The proposed merger of the Limerick City and County Council will help develop the City. The rationale behind the merger is to address the economic, social and administrative challenges facing the city in a more cohesive manner
- Continued support for the first phase of Limerick Regeneration Programme (€337m). Various reports highlighted that the Regeneration Programme is critical for the future of Limerick City.

The issue of declining retail in the City Centre needs to be addressed in order to improve the image and create a vibrant sustainable City.

Other recommendations made were to establish a city marketing fund; enhance and pedestrianise the City Centre and promote/brand the Region using 'stimulus' events including sporting, cultural and business conferences that excites international interest.

In parallel to the aforementioned merger between Limerick City and County Councils, the merger of North Tipperary and South Tipperary County Councils is proposed to occur after 2014. The merger between North Tipperary and South Tipperary County Councils will create the 6th largest county in Ireland, with a population of 158,652, which would be the 3rd most populated rural county nationally. The rationale for this merger is the same as the reasons for merging Limerick City and County Councils.

3. To improve cost competitiveness

The Mid-West Task Force report stressed the need for costs to be reduced at a national level as well as at a Regional level. The report recommended that a national cost competitiveness strategy be developed and delivered. The National Competitive Council's 2011 competitiveness agenda report highlights that there have been significant cost competitiveness gains made since 2008, however it is not happening quickly enough to improve the prospects for people who need jobs. There needs to be a continued consistent focus across Government on driving down the costs to create an environment where business can flourish, job creation can become a reality and exports continue to grow.

41 Source: National Competitiveness Council. Annual Competitiveness Report 2009, Volume 2 – Ireland's Competitiveness Challenge, January 2010

42 Source: Cities of Opportunities, Partnership of New York City/ PwC, March 2010

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4. To take a cohesive approach improving infrastructure in terms of transport, business parks and broadband.
The RPGs, Mid-West Task Force Report and the Forfás report highlighted the need to prioritise the completion of the M18, construct the M20 (the Limerick–Cork leg of the Atlantic Corridor); construct the Adare Bypass, improve the Foynes Port Link; construct the Limerick Northern Distributor Road, improve infrastructure around Shannon Airport and the port of Foynes etc. However, the access to Shannon Airport has been improved as there has been significant progress on the M18 Galway corridor with the opening of the Shannon Tunnel and Gort to Crusheen motorway. The completion of the M18 from Gort to Galway is a priority and should be constructed to make Shannon Airport more accessible to and from Galway City.

Shannon Airport/Free Zone is identified as one of the prime areas in the region for indigenous and international investment.

The availability of sufficient and competitive broadband needs to be improved in the Region. High quality broadband infrastructures, and data centre capacity, are critical to attracting investment into the Region in the future.

Both reports also recommended that the installation of metropolitan area network (MANs) in Shannon, Ennis and Thurles.

The Mid-West Task Force pointed out in their interim report, spending on infrastructure now will create jobs in the short term, and in the long term create an environment for investment.

5. To support the development of Shannon Airport and the Shannon Estuary Ports
Various reports (e.g. the RPGs, Mid-West Task Force and Forfás) highlighted that there is a need for greater support for the development of Shannon Airport and Shannon Estuary and its ports, particularly Foynes Port. Shannon Airport/Free Zone is identified as one of the prime areas in the region for indigenous and international investment.

Road infrastructure and connectivity surrounding the Shannon ports should be improved. Where required, additional zoned land should also be made available around the airport, ports and the land bank holdings of the DAA, Shannon Development, SFPC etc. These lands should be planned and serviced to allow the airport and ports to realise their full potential as drivers of Regional growth, enterprise development and employment areas. The drivers of such economic development could include a major passenger/freight/cargo hub in Shannon Airport in addition to the expansion of the port activities and promotion of associated business in the area. The Strategic Integrated Framework Plan (SIFP) for the Shannon Estuary will help identify the nature of development, economic growth and employment that can be accommodated within the Shannon Estuary.

The significance of the Region's ports and in particular the Foynes Port is recognised internationally, nationally and regionally. The Ports Policy Review Consultation Document, Department of Transport (2010) highlighted how ports are in a position to facilitate the return to economic growth. The RPGs also stated that economic growth must be promoted along the shores of the estuary.

The Shannon Foynes Port Company are presently preparing a masterplan which will provide a thirty year framework for growth promoting and supporting the development of a strategic vision for the provision of port infrastructure. It will focus specifically on the growth and expansion of Foynes Port, Limerick Docks and alternative uses for non-core assets located at those facilities. Extensive consultation was undertaken in autumn 2011. Key findings were that Foynes Port and Limerick Docks should expand their activities, rail and road infrastructure needs to be improved and there is an immediate requirement for deep water berthage greater than the current 10.5 metre in Foynes to meet new trading demands and larger vessels.

6. To enhance skills and education

A clear understanding of skills capacities/ specific capabilities in the Regions is essential and a list of skills required to service the range of potential future sectors/activities should be developed. Education establishments need to diversify to meet these future needs. The Expert Group on Future Skills Needs have already carried out some research.

Greater collaboration between the 3rd level colleges in the Region should be further developed to ensure flexible responses to the current situation & the efficient utilisation of all facilities and resources.

Agencies should work with companies and Higher Education Institutions (HEIs) to consider student work placements.

The Mid-West Task Force recommended that where possible, those in education should plan to remain there for the immediate future and reduce the time frame for qualification for the back to education allowance (3rd level) to three months and the number of places on FÁS and VEC courses should be increased and additional resources provided to do so.

Third level institutions in the Mid-West Region need to target and achieve increased national and international research and development funding to bring them into line with the more successful third level institutions across the Country.

7. To tackle growing unemployment.

There is a need to drive coherent thinking and delivery across all the relevant government departments.

The Mid-West Task Force recommended that funds should be allocated to relevant Departments & FÁS to encourage people to stay in education or return to education (re-training and up-skilling) and to the community enterprise schemes to provide employment and services in local communities. This has been addressed to some extent through the Government's Higher Education Springboard Programme. It is an initiative for unemployed people to gain qualifications and to up-skill so as to enable them gain employment in sectors where skills shortages have been identified. It provides 6,000 higher education places.

Third level institutions in the Mid-West Region need to target and achieve increased national and international research and development funding to bring them into line with the more successful third level institutions across the Country.

All the other recommendations e.g. stimulate support for enterprise; ensure agencies support the Region will all help tackle the growing unemployment.

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8. To stimulate and support the enterprise, innovation and R&D environment
Government policy is focused on supporting the 'Smart Economy'. 'Building Ireland's Smart Economy' sets out a framework to address the current economic challenges and to build an economy that combines the successful elements of the enterprise economy and the innovation or 'ideas' economy while promoting a high quality environment, improving energy security and promoting social cohesion. A key feature of the 'Smart Economy' is building the innovation component of the economy through the utilisation of human capital (the knowledge, skills and creativity of people) and its ability and effectiveness in translating ideas into valuable processes, products and services.

In terms of innovation a targeted approach to building company capabilities to innovation should be taken, taking into account the wider sources for innovation, end customers, companies with complementary products/ services, suppliers etc. All elements of physical infrastructure (business parks, broadband etc.) and soft infrastructure (skills, ease of access to market intelligence, business supports, facilitation of company networking etc.) need to be in place to stimulate enterprise and innovation and hence create jobs in the Region.

A number of initiatives have already been set up in the Region e.g. Tus Nua, a multi-agency group which specifically addresses the issues of business closures and downsizing across companies. The group have delivered support to individuals and companies through their web portal, information events, a collaborative information brochure, and programmes such as EI led Enterprise Start Programme etc. A successful application was made under the EU's European Globalisation Adjustment Fund in June 2009; this funding is supporting the costs of a personalised package of occupational guidance, training, employment, entrepreneurship and educational measures for workers made redundant at the DELL plant and ancillary enterprises.

The Forfás report recommended that the government bodies and agencies based in the Region need to assess how they themselves

can engage in innovation, improve performance, increase service efficiency and minimise costs

Forfás also recommended that the best way to enable companies to access technologies & research from HEIs should be considered i.e. the taking a proactive and open approach to IP negotiations etc. Interactions between HEIs and industry should be facilitated by promoting awareness of existing initiatives, i.e. EI's Industry Led Research Platform programme, Skillnets sector specific training initiatives etc.

The development agencies and HEIs have already demonstrated their ability to work collaboratively to achieve common aims e.g. the Túsna Initiative – an initiative launched by LIT and included UL, FÁS, Enterprise Ireland, IDA, The VECs and the City and County Development Board which aims to retain and educate those who have lost their jobs by providing comprehensive details about opportunities across the Mid-West. This initiative should be built on, to continue to develop a more structured approach for ongoing and proactive communications with the local authorities and HEIs.

The Mid-West Task Force recommended that bank funding for the SME sector needs to be made available on reasonable commercial terms and that Regional Aid derogation could be sought to permit support levels for Raheen Business Park, National Technology Park and the Shannon Free Zone.

9. To ensure that agencies prioritise the Region

The Region has seen the biggest drop in agency supported employment over the last 10 years. In terms of job creation, the Region needs to continue to make its case to be prioritised by the respective agencies.

In March 2010 the IDA launched its Horizon 2020 Strategy. The document sets out in detail the areas that the agency will target in order to maximise Ireland's attractiveness to potential investment. Specific targets for the period 2010-2014 including 105,000 new jobs; 640 investments and that 50% of investments will be located in areas outside Dublin and Cork.

The focus of the strategy is on winning new investments, particularly from the following sectors: life sciences; pharma and biopharma; medical devices; ICT; financial services; content industry; consumer and business services; diversified industries and engineering and clean technologies. The majority of the IDA identified sectors have been identified as potential growth sectors for the Mid-West Region.

In 2011, the IDA announced 79 investments of which only three of the investments were in the Mid-West Region. In 2012 the IDA announced a further 36 investments across the country of which four announcements were made for Limerick City resulting in the generation of 84 jobs.

There are positive signs for the Region. In 2011, the IDA brought 40 potential foreign investors to Limerick. The number of business visits to Limerick was second to Dublin.

10. To have a single voice to leverage the power of a unified business network

Now more than ever before there is a need for the businesses in the Region to work together in a cohesive manner, in order to ensure that the regional economic vision is realised.
The Mid-West business network has a good track record in making themselves heard and speaking with one voice e.g. when flights were pulled out of Shannon Airport.

It is important to ensure that potential new business and investments in the Region are strategically located to benefit the Region as a whole.

5.4 > TRANSPORTATION STRATEGY

5.4.1 > OBJECTIVES

Development of the Transportation Strategy has been influenced by the study objectives set out in Section 2.2, the objectives of the Regional Planning Guidelines 2010-2022 and objectives contained in the Smarter Travel policy. These have been refined into a series of objectives under the themes of economic growth, balanced spatial development, urban renewal, social inclusion, environment and transport, as follows:

Economic Growth
- Retain a robust and well balanced economy.
- International links and competitive location.
- Provide physical infrastructure required to support industry.

Balanced Spatial Development
- Facilitate the implementation of the Mid-West Regional Planning Guidelines and Core Strategies for each local authority.
- Develop Limerick/Ennis/Shannon as a co-ordinated urban agglomeration as the core driver for the region.
- Develop key service centres for each peripheral part of the region, linking to Limerick/Ennis/Shannon.
- Reduce car commuting where possible.
- Maximize the use of existing infrastructure.

Urban Renewal
- Develop Limerick City Centre as a multi-purpose zone supporting social and commercial activity.
- Promote regeneration of run-down areas.
- Provide good public transport to reinforce the role of the city.

Social Inclusion
- Improve accessibility to employment, education, health and community facilities.

Environment
- Minimize or where necessary avoid impact on sensitive areas.
- Minimize impact on rural landscape.
- Promote sustainable access to countryside.

Transport
- Link Limerick City Centre through an integrated public transport system and traffic management system.
- Ensure a high quality public transport system.
- Provide rural transport opportunities for the hinterland areas to access the core area and economic nodes.
- Link the region with Galway, Cork and Waterford creating a critical mass to attract investment.
- Investment in transport infrastructure.
- Reduce car dependency and increase smarter travel.

5.4.2 > CONSULTATION

The development of the public transport strategy for the Mid-West has been shaped by the opinions expressed during meetings with elected members, the workings of the councils, meetings with stakeholders and a preliminary public consultation exercise undertaken in October 2009. The purpose of this consultation was to explore local people's perceptions and attitudes to current transport issues in the Mid-West region and to help develop a vision for the future. Four focus groups were conducted, in Limerick city, Ennis, Newcastle West and Nenagh.

The general consensus from the group discussions was that public transport is either unreliable or, in the case of rural areas, non-existent. However, participants discussed the impracticality of developing a regular and reliable public transport system - given the high cost, low demand, and wide area to be covered – but suggested that a demand responsive transport-type service could work.

The points made in relation to the 2030 Vision for the Mid-West region included:

- Concentrating growth in Shannon and Limerick would put other towns at an economic disadvantage, although it was agreed that development should be focused on Shannon to safeguard the Airport and bring about better job opportunities.
- A more integrated transport system is needed. Buses should be frequent, reliable, cheaper and reach a wide range of people. Rail services should support local areas better, provide a link to Shannon Airport and be cheaper.
- Integrated ticketing was also felt to be important. Park & Ride facilities would work as part of an effective traffic management programme.
- Overall, all participants wanted growth to happen in the towns across the region as well as in Limerick, citing concerns about reduced quality of life from longer commuting distances as well as increased congestion in Limerick.

The development of the public transport strategy for the Mid-West has been shaped by the opinions expressed in the focus groups and comments received on a number of technical papers covering each of the transport modes presented to the four councils.

5.4.3 > PUBLIC TRANSPORT FEASIBILITY STUDY

Informing the strategy is a Public Transport Feasibility Study (PTFS), included as Appendix A. The PTFS comprises an important input into Mid-West Area Strategic Plan and aims to achieve a modal shift from car to more sustainable modes, primarily public transport, in its various forms. It strongly concentrates on the City Centre with regional connectivity and accessibility as key objectives.

The foundation of the PTFS is a 2009 base year multi-modal transportation model. The transportation model was built to be used as an assessment and scenario testing tool against which the strategy may be tested. Included in the model are comprehensive sets of data including:

- Data collected from over 30,000 face-to-face surveys with the travelling public
- Data collected on the movement of freight vehicles and commodities
- CSO data – PoWCAR, 2006 Census
- Population and employment targets and locations
- Future transport networks

The PTFS aims to reconcile the different transport needs of the population centres by improving accessibility and hence expanding opportunities within the region and improving links beyond. The existing transport options have been reviewed and it is clear that bus, coach and rail form a very small proportion of total journeys, car being by far the most popular means of travel around the region.

A number of possible improvements have been considered including demand management measures, upgrading of rail services, the introduction of more and better buses, the role of bus rapid transit, smarter travel and combinations of the aforementioned. For the rural area, public transport is difficult to provide and inevitably costly given the dispersed population. One option is to explore the role of taxi-bus services, linked with the main inter-urban bus corridors and the reshaping of the hinterland bus service into a more formulated "hub and spoke" service plan connecting into the main public transport nodes.

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Park and Ride will also have a role, primarily for Limerick city, by intercepting car journeys from the rural hinterland. In addition, smarter choice initiatives can contribute to play a role in the reduction of single occupancy car use and supporting healthier communities.

A single population growth scenario has been utilised, following consideration of various options. That population growth scenario is a replica of the Mid-West Regional Planning Guidelines, as informed by the Department of Environment, Community and Local Government population targets. For the following eight years it has estimated to grow to the order of 500,000. Aligned to the growth scenario a number of transport scenarios were tested, as outlined below.

Scenario 1 (Do Minimum) is based on the Regional Planning Guidelines and focusing population and employment in Limerick and the remaining dispersed across the region and with no changes to the current transport provision with the exception of some very low cost soft measures.

Scenario 2 (Do Something Low Cost) uses same population targets as Scenario 1 but includes a number of proposed public transport improvements.

Scenario 3 (Do Something High Cost) is a summation of Scenario 2 and further additional measures. It uses similar targets bu with a strong emphasis targeting a mode share of 55% for modes other than car; as per Smarter Travel policy, for the city region and a mode share increase for the hinterland. Accordingly this scenario includes a wide range of public transport and other initiatives, both hard and soft, but no demand management measures.

In Scenario 2, improvements to the local bus network in Limerick city and demand responsive services in the rural area are suggested. To achieve the significant mode shift outlined in Scenario 3, an extensive range of measures is proposed including major upgrading of public transport (both infrastructure and services), smarter choices initiatives and land use policies to avoid dispersed development plus investment in rural public transport.

A significant change in the regions mode split will be very difficult to achieve and may only be achieved with considerable sustained investment over a long period aligned with settlement and employment strategies. However, in the urban areas, in particular Limerick metropolitan area, the smarter travel policy targets will be achievable with targeted sustained investment. This will require the prioritisation of development into specified areas, along transport corridors as well as in the core City Centre.

Largely excluded from this strategy is the role that the electric car may have due mainly to the lack of specific transport policy relating to this specific mode of vehicular travel.

5.4.4 > STRATEGIC ROAD INFRASTRUCTURE

The requirements for the assessment, prioritisation and promotion of strategic road infrastructure are primarily a matter for the National Roads Authority. However, the potential of the region is impacted upon due to the lack of connectivity and uncertainty over schemes connecting the region to other Gateways.

Given the recent decline in government funds many of the proposed upgrades to national road routes within the region will not see the required investment in the short to medium term. In the interim, localised measures to upgrade sections or even create localised bypasses in order to facilitate better economic competitiveness for the region and enhance safety should be examined. The priority routes in this regard are the M17, M18 and M20, all of which form part of the Atlantic Corridor, a key infrastructure requirement.

Additionally, upgrades involving alterations to horizontal and vertical alignments and improved surface treatments should be considered for the following National Secondary routes N52, N62, N67, N68, N69, N75, N24 and N85 to improve connectivity, accessibility and competitiveness given the reliance on car trips in the region.

The strategic road network is the crucial element in ensuring the region's integration, making provision for smarter travel modes, in providing access to its major facilities and in protecting major urban centres from large-scale traffic activity.

The National Road recommendations for the region are detailed overleaf.

Prioritisation of these road schemes will take into account financial, environmental and spatial considerations. These schemes will be subject to review of the National Transport Authority, Department Of Finance Project Appraisal Guidelines and the findings of full environmental and habitats assessment in the context of legislative obligations.

National Road Recommendations		
1.	M18/M17	Connection of Atlantic Corridor to Tuam via Galway;
2.	M20	Connection of Atlantic Corridor to Cork and the linkage between the M20 and M/N21 (Adare By-Pass)
3.	M21	Review the corridor improvements and connection to Newcastle West, giving consideration to N69 connection (refer point 9 below)
4.	N24	Connection between the gateways of Waterford and Limerick/Shannon
5.	N52	The Mid-West link from the region to the Midlands and on towards Dundalk and Belfast
6.	N62	The link from the M8 through Thurles and Templemore giving the west of the region direct access to the M8
7.	N67	The upgrading of the Atlantic Corridor to facilitate access, connectivity to Killimer Ferry and support the Atlantic corridor tourism trail
8.	N68	The upgrading of the link between Ennis and Kilrush connection one of the Economic Nodes to the Hub and also increasing accessibility from the south-west of the region
9.	N69	Primary access route to Shannon Foynes Port requires complete upgrade and consideration of connection with M21 (refer point 3 above)
10.	N75	Upgrading of the link from Thurles to the M8
11.	N85	Upgrading of the direct route between the Hub of Ennis and transport node of Ennistymon improving accessibility and economic competitiveness for business from the west of Clare
12.	N65	Upgrading of the N65 Borrisokane to Portumna Road
13.	N69	Upgrade the road access to Foynes Port to motorway standard

5 > THE STRATEGY

5.4.4.1 > Regional and Local Routes

The second tier of the highway transport in the Mid-West Region is formed via the network of regional and local roads which form connections with the national road network.

These provide essential connectivity to the diverse hinterland of local towns, villages and rural communities. Rural roads play a strategic role and form a significant part of the transport network providing access and connectivity. Many of these existing roads require attention and there will also be a requirement for the development of some new builds and town bypasses to protect and sustain competitiveness and smaller urban centres. Some of these links and bypasses may be progressed through private sector financing.

Consideration must also be given to the cost of maintaining and reshaping road infrastructure where new national routes have been implemented and old national designated routes have been downgraded. This is of particular importance where these bypassed routes are in urban areas and continue to carry high volumes of traffic. This includes a number of reclassified roads inside Limerick Southern Ring Road and Ennis Bypass, where volumes are higher than some national routes in the region.

The development and upgrade of National/ Secondary and Regional Roads will stimulate and facilitate the development of Tourism and Economic Development throughout the Mid-West Region.

The regional and local road networks form a significant part of a regional transport strategy to aid in competitiveness, connectivity, accessibility and enhance the public transport offering.

One of the most important of these schemes is the Limerick Northern Distributor Road, to the north of Limerick City. This scheme, crossing three local authority jurisdictions would enable the region to connect and access the northern periphery of the city limits and protect the City Centre. It also brings the ability to make the regeneration area more accessible, enhance access to Limerick University and the related industrial zones. Prioritisation of these road schemes will take into account financial, environmental and spatial considerations.

These schemes will be subject to review of the National Transport Authority, Department Of Finance Project Appraisal Guidelines and the findings of full environmental and habitats assessment in the context of legislative obligations.

Non-National Road Recommendations	
1.	A Limerick Northern Distributor Road to the north of Limerick City opening access to the regeneration areas, linking the N7 and M18 to further protect the City Centre, to enhance access to the University of Limerick and its associated knowledge-based industrial zone
2.	Provision of the Thurles outer relief road giving a more appropriate and direct link with the M8 motorway
3.	The provision of an upgrade to the R503 link road between Thurles and Limerick City
4.	Provision of a link between the M7 and the N62 in Roscrea (Roscrea By-Pass)
5.	An upgrade of the R352 link between Ennis and Scarriff/ Killaloe in order to provide access to the Gateway/Hub
6.	Upgrade to the R515 (Abbeyfeale to Tipperary Town, via Charleville)
7.	The R518 road link between Kilmallock and the Limerick/Cork route
8.	The R494 link and new bridge between the Killaloe/ Ballina-Limerick route and the Nenagh/ Limerick route to facilitate access from the north-west of the Region to the Gateway. This development will also involve the provision of a by-pass for Killaloe/Ballina and possible connection to M7
9.	Childers Road Upgrade to include the provision of facilities for sustainable transport, including bus priority, cycling and junction upgrades
10.	The heavily used tourist routes in West and Central Clare including R460, R463, R473, R474, R478, R479, R480, R485 and R487
11.	Road links along the Shannon Estuary to facilitate employment, tourism and access
12.	Local authorities have identified strategic regional roads in Development Plans
13.	Roads associated with connection to identified regeneration areas
14.	Provision of an inner link road on the south east side of Thurles, linking the N62 and the N75 to provide relief to traffic congestion in the centre of the Town
15.	An upgrade of the R438 Borrisokane to Athlone Road
16.	The upgrading of the R498 link road between Thurles and Nenagh and connection to the M7 Nenagh Bypass
17.	Provision of a link between the N52 and the R445 (east of Nenagh)

5.5 > BALANCED GEOGRAPHIC DEVELOPMENT

In developing the MWASP strategy some basic principles have been assumed that align with national and regional publications associated with social impact and balanced development. The principles of achieving balanced geographical development have been:

- In areas of urban influence to provide and facilitate access to more sustainable services and facilities associated with a contemporary urban area.
- To develop a series of larger towns in the region to become stronger centres for residential, commercial and industrial development
- To enhance the livelihood of smaller towns, villages and rural areas as commercial and residential centres and protect and sustain villages and rural areas
- Ensure development is sustainable, environmentally neutral or better to the largest effect possible.
- The development and maintenance of viable, thriving communities in the City, urban and rural areas of the region.

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5.5.1 > IMPACT ON ENVIRONMENT

The improvements in settlement and infrastructure will allow for sustainable development, the protection of the environment and result in the reduction of pollution levels. It should be noted that one important element of the MWASP is that principles of sustainability and environmental protection are at its core. The proposed mitigation measures from the Strategic Environmental Assessment (SEA) undertaken for the project have been fully integrated into the MWASP.

The SEA describes that in general the preferred MWASP strategy has a largely positive impact on the receiving environment, with the implementation of appropriate mitigation measures and ongoing monitoring programmes

The development of MWASP has also taken into account the requirements of national planning and environmental legislation and the European environmental directives. The public transport actions will have a positive impact by decreasing reliance on private cars, thus alleviating congestion, the need to travel, producing alternatives and reducing concentrations of emissions.

It should be noted that certain projects which may result from the implementation of MWASP will be required to undergo Environmental Impact Assessment in line with the requirements of the relevant planning and development legislation.

5.5.2 > IMPACT ON EQUALITY

Many of the actions are gender-neutral. The provision of high-quality facilities enables the greater participation of all in the workforce. The transport actions will benefit women as they are more dependent on public transport. The expansion of and improvements to accessibility will be beneficial to women as they are more likely to be involved in caring for the elderly, the disabled and children who need medical services and access to education.

5.5.3 > IMPACT ON POVERTY

Improvements in employment opportunities will have a positive impact on poverty and will lead to a wider range of employment opportunities for those on low incomes. Provision of affordable housing and improved access to recreational, educational and social amenities will have a positive impact on alleviating the effects of poverty.

5.5.4 > IMPACT ON RURAL DEVELOPMENT

Balanced Geographic Development will have a positive impact on rural development as the benefits of economic development can be more evenly distributed, especially if the core continues to strengthen. Improvements in water quality will support rural development as the provision of clean water to rural dwellers will improve the quality of their lives and make these areas more attractive places in which to live.

5.6 > QUALITY OF LIFE

Quality of life is closely related to wellbeing, and for the purpose of this strategy is taken to refer to the individual's and society's social, economic and physical state. There is currently no agreed methodology for estimating impacts of development on Quality of Life. The CSO in its "Regional Quality of Life in Ireland" 2008 used changes in seventy-one variables under the eight indicators of housing, population, lifestyles, transport & travel, health care, education, economy and environment to indicate changes in Quality of Life. Consideration has been given to these issues in the development of this strategy.

5.6.1 > IMPACT ON ENVIRONMENT

There will be a positive benefit on the environment arising from more centralised development and increased use of smarter travel modes. A detailed assessment of the potential impact on the receiving environment was undertaken for the purposes of SEA. In general the SEA determined that the preferred MWASP strategy has a largely positive impact on the receiving environment. The SEA process has identified appropriate mitigation measures and ongoing monitoring programmes.

5.6.2 > IMPACT ON EQUALITY

A wider range of employment options will offer greater opportunities for women, especially in the tourism sector because of its ability to accommodate atypical working arrangements.

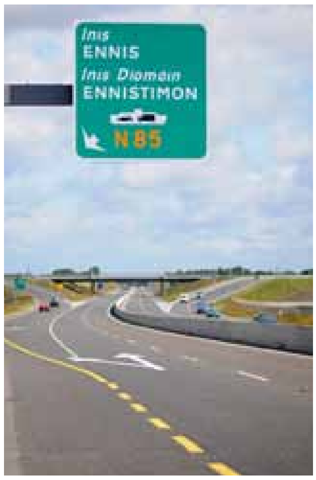
5.6.3 > IMPACT ON POVERTY

Increased lifelong learning opportunities will have a positive impact on poverty levels. Specifically, training and apprenticeship courses linked to the future needs of the economy and an increased level of adult literacy will lead to greater employability potential for those on low incomes. Provision of supports for families will increase opportunities to engage in economic opportunities and thus increase income.

5.6.4 > IMPACT ON RURAL DEVELOPMENT

The Mid-West, with rural population of c. 54%, which is above the national average of 40%, must develop a strong core for the region, which in turn will facilitate growth of the hinterland and lead to a positive impact on rural development. Vibrant, active communities will result in improvements in facilities leading to an improvement in the quality of life in rural areas. Conservation of the natural environment will increase the potential of the tourism industry in local areas and thus provide an additional source of income to the rural community.

The improvement in river water quality will increase the potential for water based recreational activities. Proofing will be an ongoing process with records of the implementation of actions maintained by the implementing agencies to ensure that the actions are having the desired results and are not causing unanticipated negative impacts.



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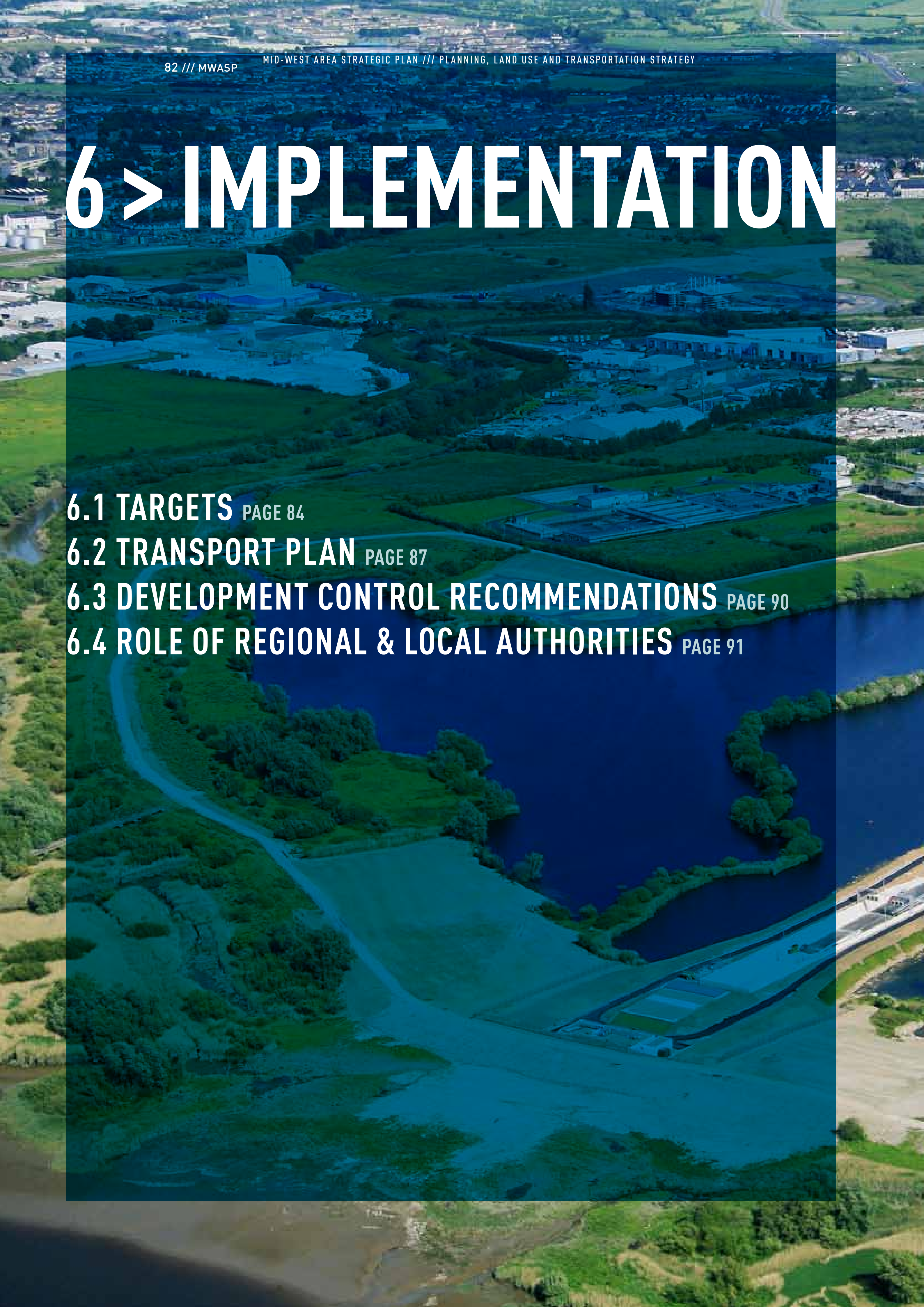

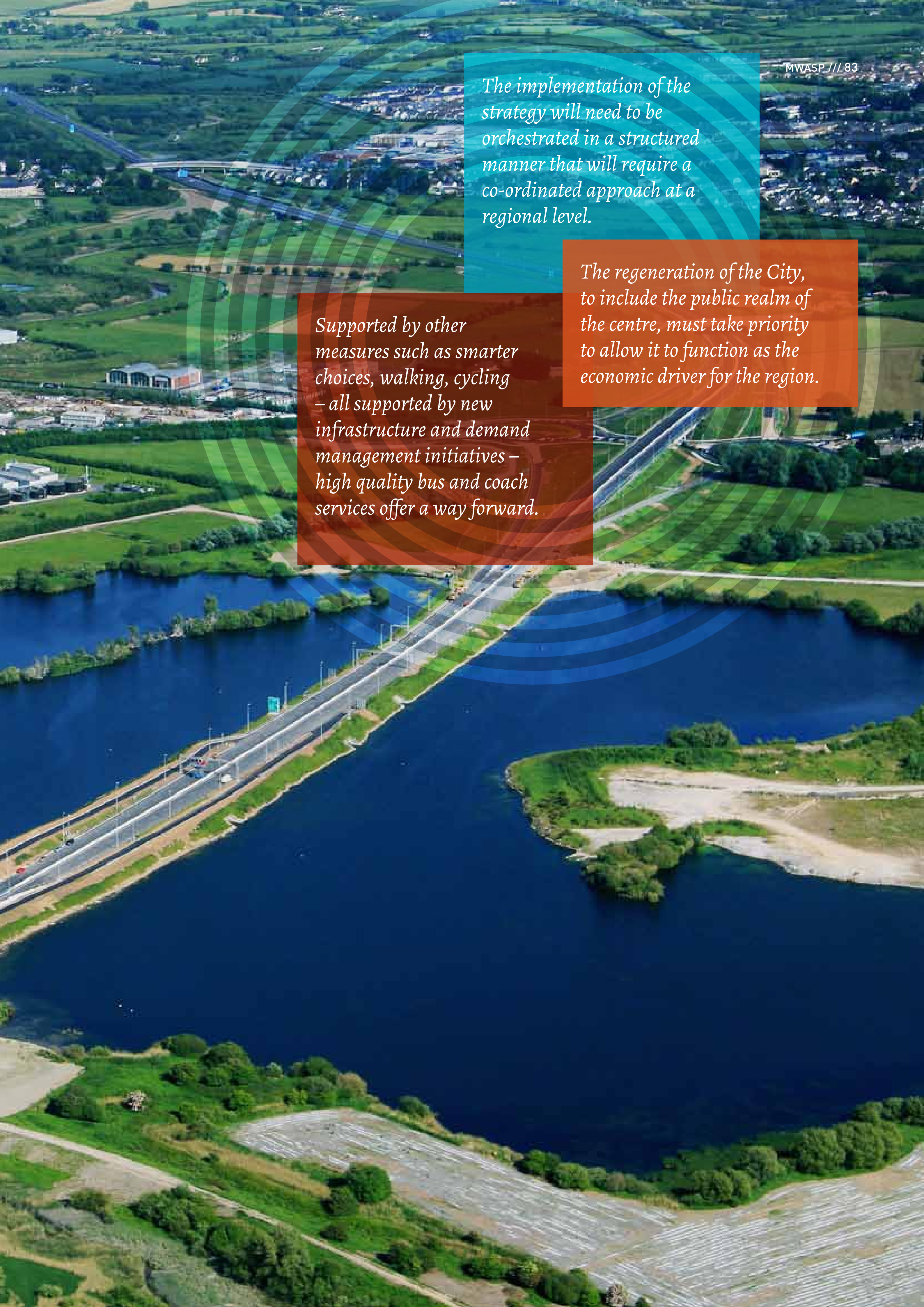

The implementation of the strategy will need to be orchestrated in a structured manner that will require a co-ordinated approach at a regional level.

Supported by other measures such as smarter choices, walking, cycling – all supported by new infrastructure and demand management initiatives – high quality bus and coach services offer a way forward.

The regeneration of the City, to include the public realm of the centre, must take priority to allow it to function as the economic driver for the region.

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The implementation of the plan will commence immediately and is targeted to profile and support the region until 2030 or until the population reaches 500,000. The implementation of the Plan has already begun with recognition of the MWASP in the RPGs and in the region's Development Plans. The government's moves to amalgamate two of the regions authorities will also help to achieve some of the Plans proposals and objectives.

The development of the strategic plan is not a means to an end but the first step in achieving betterment in many ways. But in order to achieve the benefit that the Plans sets out the Plan must be implemented with purpose and drive.

The Plan must be managed, financed, monitored, phased and achieve its targets in order to strengthen the region and grow to its potential of achieving the vision.

Implementation of the strategy will require a concerted effort to prioritise investment in social and physical infrastructure and to manage land use in a coordinated way. The prioritisation of investment should support the public transport initiatives and their integration with the settlement strategy. The regeneration of the City, to include the public realm of the centre, must take priority to allow it to function as the economic driver for the region.

This will require the inclusion of relevant policies in the Development Plans of the Local Authorities in the region. Consolidation will require the phased and controlled development of zoned and serviced land. Priority should be given to existing and proposed public transport initiatives and the development of brownfield sites. This will require the coordinated management of development elsewhere.

Population

The population targets proposed in the Strategy are indicative. Whatever population targets are achieved, it is important that growth occurs in a manner that supports and exploits investment in infrastructure, in line with the principles of the Mid-West RPGs. Therefore, monitoring of census information as set out in Section 6 is essential. The population targets will evolve and be updated through the MWRPG review process.

6.1 > TARGETS

6.1.1 > EMPLOYMENT ASSUMPTIONS

The targeted increase in jobs in the Mid-West Region to 2030 has been projected based on the following:

The regeneration of the City, to include the public realm of the centre, must take priority to allow it to function as the economic driver for the region.

1. Projected population growth
Population targets for the Region were set out by the Department of Environment, Community and Local Government (DoECLG) and were adopted by the Regional Planning Guidelines[43]. The regional population target for 2022 is 462,000, an increase of over 100,000 people from the 2006 Census. Using the DoECLG targets and projecting forward the target for 2030 would be c. 500,000. It should be noted the DoECLG population forecasts are significantly higher than those projected by the CSO in 2009.

2. Projected Labour Force Participation Rates (LFPR)
The CSO calculate the LFPR as follows: the labour force (i.e. those at work, looking for first regular job and unemployed) as a percentage of the total population aged 15 years and over. The CSO[44] projects that there will be a number of positive cohort effects i.e. more women in the labour force and minor increase in males aged 45 and over in the work force, however, the positive cohort effects will not be large enough to compensate for the downward impact of population ageing on LFPR.

Using the CSO population and labour force estimates it appears that the labour force participation rate could decrease by approximately 2.5% points between 2011 and 2021. A similar decrease has been applied to the Region.

3. Projected unemployment rates
In 2009, the Economic and Social Research Institute (ESRI) estimated unemployment rates based on two different recovery scenarios for Ireland[45]. The second, a more cautious scenario was based on a recovery taking place in 2012 and estimates that unemployment would stand at 6.8% in 2015 and 6.9% in 2020.

The ESRI have not updated their 2009 projections for 2015 or 2020, however their quarterly economic commentary for winter 2011/spring 2012 forecasts a national unemployment rate of 13.7% in 2013. This would suggest their original projections of 6.8% unemployment by 2015 would not be attainable.

The Department of Finance expect employment to rise moderately in 2012, with the pace of hiring accelerating over the next few years as economic activity strengthens and broadens out. Net employment creation of around 100,000 is foreseen over the period 2012-15. The Department estimated that the employment rate will remain high over the next number of years and average out at 10% in 2015[46].

The unemployment rate in the Mid-West, which was 16.8% in 2011, has been consistently higher than the national average over the past number of years. Over the last five years the employment rate in the Mid-West has been on average 1.5% points less than the national average. In 2011, the unemployment rate in the Region was 2% points less than the national average. Therefore, it is estimated that the unemployment rate in the Mid-West is likely to take longer to recover than other regions in Ireland e.g. Dublin.

By 2015 the unemployment rate in the Mid-West Region is estimated to decrease to approximately 13% and by 2020 it could further reduce to approximately 10%. By 2030, the unemployment rate is forecast to be approximately 8%, which is nearly half of its current rate.

It should be noted that the number of people at work in the Region will be strongly influenced by the factors aforementioned in the report e.g. the ability of the agencies and local authorities to attract enterprise and investment to the Region; the skills and education of the population; the national economy etc. In addition, estimating employment trends in a time of great national and international economic uncertainties is fraught with difficulty[47].

43 Source: Mid-West Regional Planning Authority, Regional Planning Guidelines 2010 - 2022, June 2010
44 Source: CSO, Population and Labour Force Participation Projections 2011 – 2041 (MOF1)
45 Source: ESRI. Paths to Recovery, Recovery Scenarios for Ireland, May 2009
46 Source: Department of Finance, The Irish Economy in Perspective, June 2011
47 Note: It should be noted that all assumptions used for the employment estimates are based on available data at the time of writing e.g. population forecast and unemployment forecasts and are dependent on subjective judgements based on 45. Source: ESRI. Paths to Recovery, Recovery Scenarios for Ireland, May 2009

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6.1.2 > PROJECTED EMPLOYMENT GROWTH

Based on the above assumptions and working off the CSO Principal Economic Status (PES) 'people at work' baseline of 152,300[48] in the Mid-West Region in 2011, it is estimated that the employment numbers in the Region could grow by approximately:

- 21,700 between 2011 and 2015;
- 16,000 between 2015 and 2020; and
- 22,300 between 2020 and 2030.

6.1.3 > REALITY SENSE CHECK

In order to get a reality check on the employment figures that are emanating from percentages of the population targets, a sense check was undertaken.

To apply a reality sense check to the future employment projections, past employment trends need to be considered. Between 2001 and 2008 the total at work increased by approximately 13,000 this equates to an average of 1,900 jobs a year.

Therefore, for the Mid-West Region to create the number of jobs required to have an unemployment rate of 13% by 2015 would appear very ambitious under the DoECLG population scenario.

In the short-term (2011 – 2015) it would appear that the estimated employment projections based on the CSO MOF1[49] population projections for the Region, would seem more achievable than the estimates based on the DoECLG population scenario.

Table 6.1: Estimated increase in employment numbers in the Mid-West Region (2010 – 2030)

DoEHLG	TOTAL POPULATION	TOTAL AGED 15+	TOTAL IN LABOUR FORCE	TOTAL AT WORK	UNEMPLOYED	LABOUR FORCE PARTICIPATION	UNEMPLOYMENT RATE
2006	361,028	286,646	178,800	169,200	9,600	58.9%	5.4%
2008	373,700	294,800	180,600	167,500	13,100	61.3%	7.3%
2011	379,327	298,681	183,100	152,300	30,800	61.3%	16.8%
2015	418,530	332,170	200,021	174,018	26,003	60.2%	13.0%
2020	451,936	358,696	211,130	190,017	21,113	58.9%	10.0%
2030	502,538	402,018	231,300	212,796	18,504	57.5%	8.0%
INCREASE/DECREASE							
2011 – 2015	39,203	33,489	16,921	21,718			
2015 – 2020	33,406	26,526	11,109	15,998			
2020 – 2030	50,602	43,322	20,170	22,779			
Total	**123,211**	**103,337**	**48,200**	**60,496**			
CSO MOF1							
CSO MOF1	**29,973**	**35,672**	**9,269**	**24,680**			

It should be noted that there is a significant difference between the DoEHLG and the CSO population projections to 2030. As a result, the difference in employment projections (applying the same LFPR and unemployment rates) is significant.
Source: PwC Derived based on the DoECLG population estimates, CSO LFP rates & ERSI and Department of Finance population projections

Table 6.2: Average Annual Employment Growth Actual & Estimated

AVERAGE ANNUAL INCREASE	DOECLG	CSO MOF1
2001 – 2008 (actual)	1,900	
2011 – 2015 (estimated)	5,430	1,698
2010 – 2030 (estimated)	1,199	1,299

Source: PwC Derived based on DoECLG and CSO population estimates

48 Source: CSO, Quarterly National Household Survey, Quarter 3, 20114, 20114, 2009 (Principal Economic Status), December 2011
49 Source: CSO MO – zero net migration and F1 – total fertility to remain at its 2006 level of 1.9 for the lifetime of the projections

The willingness of local government, the relevant local authorities, the development agencies, higher education authorities etc, to work in a cohesive manner, with the requisite support provided by Government, will be critical if the very challenging population targets and subsequent employment projections to 2030, as outlined by the Department of Environment, Community and Local Government, are to be at all achieved.

6.2 > TRANSPORT PLAN

As part of the development of the MWASP, in particular the transport requirements, a demand-responsive transport model has been built using the VISUM software. The base year is 2009. The model distinguishes highway and public transport modes, with the former consisting of cars, Light Goods Vehicles and Heavy Goods Vehicles and the latter of bus and train. In line with WebTAG[50] recommendations separate models have been created for the AM, IP (inter-peak) and PM time periods.

The model is based on data from a variety of sources, including new observed data covering both highway and public transport trips. Observed data has been combined with synthetic data allowing the matrices to be rich, so allowing for robust demand forecasting. The networks have been developed to include speed flow curves, car parks, and junction delays to provide realistic travel costs. Both matrix building and network coding have followed the latest guidance, including Production-Attraction (PA) format trip matrices for input to demand modelling. Calibration and validation of the models has been in line with guidance in the UK Department for Transport's WebTAG and NRA Design Manual for Roads and Bridges. The model provides a robust basis for forecasting the impacts of the MWASP study and proposed scenarios, in particular the placement of population and transport requirements.

For the design of future individual schemes, and their supporting Major Scheme Business Case, further refinements may need to be introduced to the model. This is common for these kinds of strategic transport models. The value of the model should be appreciated and further utilised to support changes in land-use and transport projects as they arise for both public and private sector development and assessment.

6.2.1 > IMPLEMENTING THE TRANSPORT STRATEGY

The implementation of the transport elements of the strategy have been phased on both budget constraint possibilities and the timeline for the roll-out of the Plan. Given the importance of the transport measures to support the movement of the economy, in terms of people and goods, the authorities and government's Department of Transport should strongly consider the establishment of a regional multi-modal transportation office mandated with designing and rolling out the proposed transportation measures.

6.2.1.1 Scenario Packages

DO MINIMUM	DO SOMETHING LOW COST	DO SOMETHING HIGH COST (PREFERRED SCENARIO)
Scenario 1 uses population projections from the Regional Planning Guidelines (RPGs) 2010-2022, based on DoECLG targets. This scenario assumes that no changes are made to the existing transport network and the only changes are soft measures.	Scenario 2 uses the same population projections as scenario 1 above, but includes improvements to the public transport network as well as all infrastructure in County Development Plans and new roads proposed by the National Roads Authority.	Scenario 3 uses the same population projections as scenarios 1 and 2 above, but has been developed with the objective of achieving a greater mode share for modes other than car. A range of public transport, smarter choices, land use and transport planning measures have been identified with the objective of achieving a greater public transport modal share and alternative to the car.

50 WebTAG refers to the UK Department for Transport's web-based multimodal guidance on appraising transport projects and proposals

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The proposed programme of transport interventions for Scenario 2 is presented in Table 7.1 (refer to Page 109). This indicates the various interventions, order of magnitude capital costs and likely timescales by which they should be implemented, set against target population figures as outlined earlier.

In this scenario bus routes are changed and frequencies enhanced, whilst also three BRT/QBC routes are introduced. Park and Ride capacities are increased. These are all explicitly modelled. Again, a number of Smarter Choices are included, and reflected through an additional increase of 20% in overall PT patronage, counterbalanced by an equivalent reduction in car trips. Some planned public transport interventions cannot be modelled, such as station refurbishment, SVD, RTPI and some of the proposed Park and Ride sites.

The model predicts that the public transport mode share increases to nearly 8%. Compared to the Do-Minimum case, this is an increase in public transport patronage of 43%.

The impact on highway and public transport passenger kilometres travelled and associated travel time is more visible. Highway kilometrage and vehicle hours fall (compared with the Do-Minimum) by 3.5%. Public transport passenger kilometres more than double and nearly triple compared to the 2009 base. Total travel time rises slightly less, indicating a slight speeding up of public transport trips.

The proposed programme of transport interventions for Scenario 3 is presented in Table 7.2. Scenario 3 is made up of those interventions listed under Scenario 2 and the additional ones listed under Scenario 3. This high cost scenario includes further improvements to bus services, frequencies and priority. Some bus gates are introduced. These are all explicitly modelled. Further Smarter Choices and as a result, the public transport share increases to nearly 9%, through an increase in public transport trips compared to the Do-Minimum situation of 65%.

Table 6.3: 2020 Do Minimum and Do Something Scenario 2 Daily Trips and Model Share

2020 DM	HWY	PT	2020 DS2	HWY	PT
Trips	267,189	15,217	Trips	261,742	21,827
Share	0.946	0.054	Share	0.923	0.077

Table 6.4: Comparison of Daily (12 hour) Kilometres and Hours (2009 and 2020)

HIGHWAY	2009BASE	2020DM	2020DS2
VehKm	543,659	731,106	707,288
VehHr	8234	10370	10029
PT	**2009BASE**	**2020DM**	**2020DS2**
PassKm	44,268	56,742	124,106
PassHr	740	887	1858

Table 6.5: 2020 Do Minimum and Do Something Scenario 2 Daily Trips and Model Share

2030 DM	HWY	PT	2030 DS3	HWY	PT
Trips	306,927	17,573	Trips	261,742	21,827
Share	94.60%	5.40%	Share	0.923	0.077

Please see 'Abbreviation of Terms' on page ii for explanation of acronyms.

Table 6.6: Comparison of Daily (12 hour) Kilometres and Hours (2009 and 2020)

HIGHWAY	2009BASE	2020DM	2020DS2
VehKm	543,659	731,106	707,288
VehHr	8234	10370	10029
PT	**2009BASE**	**2020DM**	**2020DS2**
PassKm	44,268	56,742	124,106
PassHr	740	887	1858

Please see 'Abbreviation of Terms' on page ii for explanation of acronyms.

Despite the quite modest increase in the number of public transport trips, the number of passenger kilometres increases substantially compared with the Do-Minimum: an increase by 237%. Car kms reduce by only 2.5%, again reflecting the continued dominance of the car mode in the study area.

An investment of €169.7M increases the public transport market share from 5.6% in 2009 to 7.7% in 2020, reflecting a trebling of passenger kilometres compared to the 2009 base year. An investment of €322.6M by 2030 increases the public transport share to 8.9%, and quadruples the passenger kilometres. This is not surprising as the base year modal share of cars is so high (94%). The public transport share in Limerick is greater (13% in the base year and 16% in the 2030 Do-Something Scenario 3) but the effectiveness of the policies is no greater.

6.2.2 > TRANSPORT SCENARIO CONCLUSIONS

The current public transport services have a number of weaknesses in addressing transport need, particularly in the rural parts of the region due to the dispersed nature of settlements and employment locations. Bus and coach services are established but have limited appeal for a variety of reasons while the uptake of rail is very poor as a proportion of total journeys.

To address policy objectives, public transport needs to play a much more prominent role. New forms of providing services have been considered including light rail (prohibitively costly) and Bus Rapid Transit for core corridors into Limerick city and linked with Park and Ride facilities for motorists from the surrounding rural catchments.

Preliminary technical papers produced for the project Steering Group and Working Group were conclusive in determining that Light Rail as an option for Limerick City and the Mid-West was not a viable option. Through model tests it has been determined the city can be well served by a bus based system of various levels, including the implementation of a possible Bus Rapid Transit System serving particular corridors.

Some improvements to rail such as Park and Ride and new stations are possible although capacity is limited and the level of service is relatively low. Interchange arrangements could be improved throughout with the development of new taxi-based services linking with core bus/coach corridors. However, providing such taxi-based services is unlikely to be on a commercial basis but may play a more financially viable part of the transport system with rural transport been slightly promoted to play a more integrated role in the transport hierarchy. A small number of pilot projects should be explored, possibly one or two each in Limerick, Clare and North Tipperary Counties, advised by local authorities and rural transport operators. They will however need to be integrated with a revised approach to the rural bus network operations and onward service connections.

Smarter choice initiatives can also play a role in supporting sustainable transport options while decisions regarding land uses can have a critical impact on travel patterns. Analysis of the smarter travel options, as outlined in the combined Limerick City and County Councils' Smarter Travel Stage 2 Bid, shows the substantial changes that could be achieved

if concentrated and concerted effort is made, particularly when concentrated around all grades of education establishments and socially deprived areas.

Concentrating growth has considerable advantages to the viability of public transport services, particularly if demand management measures such as strong parking controls are introduced. Links within the Limerick city/Shannon/Ennis area are crucial in this respect if car dependency is to be reduced. It is proposed that the bus network within Limerick city is redefined to simplify services, improve efficiency and reliability and to address emerging demand more effectively although highway priority measures would help considerably in this respect. It is understood that the National Transport Authority completed a bus network review in 2011 and are proceeding to implement its recommendations. Bus Rapid Transit options including quality bus corridors could be introduced (subject to confirmation of anticipated patronage), as the basis of a revised network of services offering a high quality alternative to car use. Across the region, services could be consolidated in core corridors with local public transport connections to meet the needs of the rural communities.

A range of potential improvements is proposed. Given the settlement and land use patterns envisaged by the three scenarios considered, it is clear that interventions on a very large scale will be necessary if the aspiration for a low level of car use is to be achieved.

The role of bus-based public transport is particularly important for all scenarios and if people are to transfer from car to bus in significant numbers then there must be adequate incentives to do so.

Supported by other measures such as smarter choices, walking, cycling – all supported by new infrastructure and demand management initiatives – high quality bus and coach services offer a way forward.

However, continued dispersed development will counteract efforts to introduce efficient sustainable transport. Hence Scenario 1 achieves some change compared with current travel, Scenario 2 achieves momentum of change at a cost of around €166.2 million while Scenario 3 achieves a tripling of PT usage at €339.2 million. Amalgamated with the higher percentages that walk and the few cyclists (excluded from the modelling results) there is potential through a sustained rolling investment programme to achieve the intended 55% non car mode share in some of the larger urban centres.

6.3 > DEVELOPMENT CONTROL RECOMMENDATIONS

To realise the settlement strategy it will be necessary for statutory development plans to include specific policy objectives which will allow for the control of development proposals. To this end, areas that accord with the settlement strategy and employment strategies should be identified and prioritised for development. This should be done in the identification of land zone phasing and development along with the provision of infrastructure. Higher densities should be encouraged within the catchments of public transport corridors and particularly at transport nodes. The control of car parking provision will be necessary as will the identification of sites for Park & Ride. Generally, there is an abundance of existing land zoned for development purposes. This will require streamlining or re-zoning in subsequent regional plans and core strategies in development plans and consistency between these and the RPGs.

Again, the prioritisation of services provision will have an important role to play. It is important that a coordinated approach to development emerges in the Metropolitan Area. This may be more readily achieved under review of local governance. Nevertheless, it is essential that the imbalance in the recent growth rates between the City and Suburbs is corrected. The policies in the Limerick and Clare Joint Housing Strategy and the Retail Strategy for the Mid-West Region should be reinforced in the provision of housing and employment opportunities. The development clusters, identified in the Strategy, should be the subject of detailed master planning exercises. Such plans should identify capacities for the accommodation of additional housing and employment opportunities. Routes for public transport, walking and cycling should form the spatial framework for land use and development.

Specific Development Management standards are not provided by the MWASP. There is sufficient guidance in this regard provided by the NSS, RPGs and national planning guidelines. However, it is the policy of the MWASP that Development Plans should clearly set out in their core strategies how national guidelines have been implemented. Where feasible master plans or local area plans should be prepared which straddle administrative boundaries.

6.4 > ROLE OF REGIONAL & LOCAL AUTHORITIES

6.4.1 > MWASP IMPLEMENTATION

The implementation of the strategy will need to be orchestrated in a structured manner that will require a co-ordinated approach at a regional level. The majority of the implementation will be delivered by local authority and semi-state bodies.

The RPGs implementation structure i.e. Steering and Sub-Groups should constitute the implementation committee and should be co-ordinated by the Mid-West Regional Authority. Meetings should be held at least three times a year. It is suggested that the Steering committee meet in September to identify budgets and process applications seeking annual government financial intervention to support the strategy. In early February, to confirm the budget allocations and projects to be delivered in the coming year and in late May to track annual progress on investment and discuss progress on aligned strategies and how the MWASP needs to be applied, revised or adapted to suit the changing environment.

6.4.2 > MWASP MONITORING

An integral part of the MWASP is to provide for a framework with which to measure

6 > IMPLEMENTATION

and monitor the progress of the region. Monitoring can be carried out through a number of approaches and at a number of levels. However, before monitoring starts there needs to be an understanding of the objectives, targets and indicators against which progress can be benchmarked. There are specific high level study objectives set out in Section 2.2, strategic objectives in section 4.3 and transport strategy objectives outlined in Section 5.4.1.

The targets are both input and output targets. One of the most important input targets is the adoption and incorporation of the MWASP through the constituent authorities plans and budgets into the statutory processes. This can be done in many ways but the thrust is to see the objectives, policies, targets and schemes of the document influence future thinking of plans, programmes and agencies of the region.

Monitoring requires the identification of measurable output targets. The most readily available information will be from the Census. Data on population, employment and transport can readily be assessed at intervals during the life of the Strategy. Progress on the growth of population in specific locations can be identified. Journey times for commuters and the mode of transport used can be assessed. The location of houses, offices and retail premises can be tracked. In this way, the development of the settlement strategy can be measured. Therefore, it is necessary that the initial assumptions made in the strategy are re-examined having regard to population growth and the location of development and are aligned with the RPG policies, objectives and population updates.

Other key indicators should include, but not be limited to, those outlined in the Mid-West RPGs 2010-2022 (page 106).

Review of the strategy targets should be carried out where identified sources are available. Such processes will inform whether the higher or lower targets should be pursued and the steps with which to achieve such targets.

Table 6.7: Strategy Performance Indicators to be used in assessment of Strategy implementation

STRATEGY OBJECTIVES	INDICATOR	SOURCE
Population Targets	Population Change (actual & %) by location and age cohort	CSO
Strategic Land Use Integration	Job to Labour Force Ratios	CSO / PoWCAR
Land Use Integration	Relative location of jobs / population / education providers	CSO / PoWCAR
Land Use & Public Transport Integration	Residences / Businesses in proximity to Public Transport Stops	GeoDirectory & GIS
Settlement Sustainability	Qualitative & Quantitative Settlements Assessment	Health Checks
Implementation of national guidelines	Population Density & Household Size	CSO
Smarter Travel Targets (Mid-West Targets)	As per Smarter Travel Policy document and PTFS report.	CSO
Road User Monitoring Surveys	Travel & Transport Comparators	Surveys
Transport Infrastructure	Km of new National Primary, National Secondary and regional roads constructed.	Surveys
Port Activity	Increase in import and export tonnage handled. Increase in commercial and recreational activity on the estuary	Surveys
Public Transport Corridor and Patronage Surveys	Numbers travelling, number of services, travel times versus car, etc.	Surveys
Shannon Airport	Number of passengers and commercial tonnage (import and export) at Shannon Airport	Surveys
Transport Investment – Value for Money Review	Patronage increase, Km's of route implemented, etc	Surveys

Source: Project Team

6.4.3 > MWASP REVIEW

Given the timeframe of the Strategy, regular reviews at a minimum of six year intervals shall be undertaken. A review of the plan may also be undertaken in light of any new statistical or policy updates that would fundamentally require the recommendations to be revisited. The spatial elements of the Strategy and the mechanisms to be used for its implementation are broadly similar to those identified in the Regional Planning Guidelines 2010 to 2022. It is therefore recommended that review and progress on the implementation of both the Strategy and Guidelines be undertaken at the same time. This process should be managed by the Mid-West Regional Authority and the structure of the Monitoring Team should be similar to that of the RPG Review and Monitoring Team with additional representatives from the Department of Transport and possibly the inclusion of a Transport Expert from industry, in an advisory capacity.

6.4.4 > STRATEGIC ENVIRONMENTAL ASSESSMENT

Implementation of MWASP strategies will require the implementation of all appropriate mitigation measures and the proposed monitoring programme as outlined in the SEA Environmental Report. This will ensure that the implementation of the MWASP strategies will not result in a significant impact on the receiving environment. The inclusion of these mitigation measures in the MWASP strategy ensures that the requirements of the SEA are fully integrated into MWASP. The mitigation measures required are outlined in Table 6.8 SEA Mitigation Measures.

Table 6.8: Strategic Environmental Assessment Mitigation Measures

Mitigation No.	Mitigation Description	SEO Code
MI-1	The development of any project that has potential to impact on a European designated site will be subject to a Habitats Directive Assessment as required under Article 6, paragraphs 3 and 4 of the Habitats Directive (92/43/EEC). Developments that occur in the vicinity of areas that have potential to contain valuable habitats or species should be fully assessed by a qualified ecologist in advance of any development. Valuable habitats or species should have appropriate buffer zone provision to ensure no significant impact on the habitat or species occurs.	T-BFF-01
MI-2	The development of any project that is in a location that has potential to impact on ecological connectivity between European designated sites will be required to ensure that a full ecological assessment is undertaken to ensure that no significant impact occurs.	T-BFF-02
MI-3	The development of any project that is in a location that has potential to impact on valuable ecological habitats (both designated and non-designated) will be required to ensure that a full ecological assessment is undertaken, with project specific mitigation measures required to ensure that there is no potential significant impact. Ecological surveys should include for the identification of invasive species and where such species are identified, appropriate Invasive Species Action Plans should be adopted.	T-BFF-03
MI-4	The site selection of a P&R facility to the south of the city should take account of the Loughmore Common Turlough pNHA adjacent to the Loughmore Roundabout. There should be no drainage works in the vicinity of the Turlough. This Turlough has already experienced some degradation (lower water levels) due to drainage. It should be ensured that any discharges from water arising from the proposed facility are sufficiently clean so as not to impact on the integrity of the pNHA.	T-BFF-01 T-BFF-02 T-BFF-03
MI-5	A site location for the Ennis Bulk Transhipment Centre will be chosen at an appropriate location in order to ensure that there are No potential impacts on sensitive receptors. The requirements of the EIA and the Habitats Directives in particular should be taken into account in the development of this proposed facility.	T-BFF-01 T-BFF-02 T-BFF-03
MI-6	It is essential that the Rural Transport Programme (ROT) remains in place to service rural areas. In addition the provision of "Demand Responsive Transport" services from isolated rural areas which would link with the bus network should be considered.	T-PHH-01

Mitigation No.	Mitigation Description	SEO Code
MI-7	During the construction phase of any capital works, appropriate health and safety measures should be implemented as required by relevant legislation.	T-PHH-02, T-PHH-03
MI-8	The routing of new cycle ways and walkways will be required to serve the areas that experience the most significant level of social deprivation.	T-PHH-01
MI-9	During the construction phase of any capital works, appropriate noise mitigation measures should be implemented to ensure that the potential impact on sensitive receptors (including sensitive fauna) is minimised.	T-PHH-03
MI-10	For those in more disadvantaged areas to benefit from employment opportunities, there should be a public transport service linking the proposed Ennis Freight Transhipment facility with the main residential areas in the region i.e. Limerick, Ennis and Shannon.	T-PHH-01
MI-11	The choice of a suitable location for the Ennis Bulk Transhipment Centre will ensure minimal potential impacts on sensitive human receptors, (in addition to other sensitivities of the receiving environment – See MI-5). Full environmental impact assessments will be required as part of the planning application process for the Ennis Transhipment Centre.	T-PHH-03
MI-12	The setup of "Eco-Industrial Networks", particularly with reference to Small and Medium Sized Enterprises could be undertaken particularly in identified development cluster areas. These networks would promote the "environmental performance" of industry with particular reference to reducing energy consumption, minimising CO emissions and reducing waste generation. The Centre of Environmental Research in University of Limerick (and others) set up a pilot Eco-Industrial Network in the Mid-West region, under an EPA Strive funded project.	T-AQC-01, T-AQC-02
MI-13	In order to facilitate further reductions in emissions it is recommended that the usage of electric or hybrid cars for commuters be encouraged, particularly for rural commuters (within the range of electric cars). This could be encouraged by the provision of free "charging points" at the P&R facilities and the provision of free parking and bus transport for those who use electric or hybrid cars.	T-AQC-01, T-AQC-02
MI-13	In order to facilitate further reductions in emissions it is recommended that the usage of electric or hybrid cars for commuters be encouraged, particularly for rural commuters (within the range of electric cars). This could be encouraged by the provision of free "charging points" at the P&R facilities and the provision of free parking and bus transport for those who use electric or hybrid cars.	T-AQC-01, T-AQC-02
MI-14	In advance of the development of P&R facilities, Traffic Impact Assessments (in accordance with National Roads Authority guidelines) should be undertaken to ensure that each P&R facility is adequately designed so that it does not cause localised traffic congestion.	T-AQC-01, T-AQC-02
MI-15	The implementation of traffic prioritisation measures should only occur when there is sufficient alternative transport provision to allow for a significant modal shift.	T-AQC-01, T-AQC-02
MI-16	Any proposed development that occurs based on this strategy should undergo full environmental assessment including an assessment of potential to impact on the geological heritage at the specific location in addition to any potential impacts on soils and groundwater resources. Specific attention will be required to the requirements of the European Communities Environmental Objectives (Groundwater) Regulations, 2010.	T-S-01
MI-17	Any development proposed under this strategy should take full cognisance of the designated cultural heritage sites and designated architectural conservation areas.	T-CH-01
MI-18	The choice of suitable locations for bus stops should take cognisance of the location of protected structures and sites, and of the conservation objectives of the Architectural Conservation Areas. In addition, the design of street furniture should take full cognisance of the Architectural Heritage Protection Guidelines for Planning Authorities, DOECLG 2004.	T-CH-01
MI-19	The exact location of the proposed park & ride facilities will have to be decided upon based on a full appraisal of archaeological and architectural heritage in the area. In addition, it is recommended that during site preparation works a qualified archaeologist be present to identify any potential archaeological or architectural elements uncovered. The proposed P&R facilities will be designed to the highest standards with appropriate screening and landscaping on the approach roads to ensure that there is not a setting impact on any elements of cultural merit.	T-CH-01
MI-20	The routes of the proposed cycle and walking routes will have to be appropriately located based on a full appraisal which identifies and records elements of archaeological and architectural heritage in the area. It is recommended that if the proposed routes are in proximity to any protected structures or located within the Architectural Heritage Areas, that during site preparation works a qualified archaeologist be present to identify any potential archaeological or architectural elements uncovered.	T-CH-01

Mitigation No.	Mitigation Description	SEO Code
MI-21	Through the planning approval process it should be ensured that any potential upgrade of Colbert Station in Limerick takes full cognisance of the conservation value of the building and associated structures.	T-CH-01
MI-22	Any development proposed under the strategy should take full cognisance of the landscape character, landscape value and sensitive landscapes as identified in the relevant County Development Plans. Specifically, in Limerick City, the protection and preservation and Linear views, river prospects and approach road views should be considered as required in the draft City Development Plan 2010 -2016.	T-L-01
MI-23	The choice of suitable locations for proposed bus infrastructure in Limerick should take cognisance of the visual amenity of the city centre to minimise any potential negative impact on valuable views. Negative impacts on important linear views of landmark buildings or on river prospects should be minimised. In addition, the design of street furniture should take full cognisance of the Architectural Heritage Protection Guidelines for Planning Authorities, DOECLG 2004.	T-L-01
MI-24	The exact location of the proposed park & ride facilities will have to be decided upon based on a full appraisal of the landscape character and sensitivity of the surrounding areas. The proposed P&R facilities will be designed to the highest standards with appropriate screening and landscaping on the approach roads to ensure that there is no potential impact on the landscape and visual amenity.	T-L-01
MI-25	Any development proposed under the strategy should take full cognisance of the receiving water environment. Development should only receive planning approval at locations where adequate wastewater treatment capacity is available, so that discharges from wastewater treatment facilities do not have a significant impact on water quality. In addition, planning approvals on sites adjacent to water courses should be conditioned to include for appropriate wastewater and runoff water treatment so that there is no potential impact on water resources. In determining the potential capacity of a water body to assimilate discharges, the requirement of the Water Framework Directive in terms of attaining at least "good water status" will be considered in addition to the water quality limits set in the Environmental Objectives (Surface Water) Regulations 2010.	T-W-01
MI-26	The zoning of land areas for specific land use types will be required to comply with the requirements of The Planning System and Flood Risk Management - Guidelines for Planning Authorities (November, 2009).	T-W-02
MI-27	Planning approvals on sites adjacent to water courses should be conditioned to include for runoff water treatment so that there is no potential impact on water resources. In determining the potential capacity of a water body to assimilate discharges, the requirement of the Water Framework Directive in terms of attaining at least "good water status" will be considered in addition to the water quality limits set in the Environmental Objectives (Surface Water) Regulations 2010.	T-W-01
MI-28	Each of the BRT/QBC routes will traverse areas where flood events have been recorded in the past. The provision of any additional infrastructure in these areas should be avoided with particular reference to passenger facilities such as platforms, bus stops etc. In the event that it is necessary to provide facilities at such locations, the infrastructural elements should be designed appropriately. Planning approval for any development will have to be considered in terms of the requirements of the DoECLG guidance document The Planning System and Flood Risk Management - Guidelines for Planning Authorities (November, 2009).	T-W-02
MI-29	The site selection process for a P&R facility in the vicinity of Milltown should take full cognisance of the flood risk in this area. Sustainable Drainage Systems should be utilised in the design process for P&R facilities to attenuate runoff from these sites, mitigation the flood risk. Planning approval for any development will have to be considered in terms of the requirements of the DoECLG guidance document The Planning System and Flood Risk Management - Guidelines for Planning Authorities (November, 2009).	T-W-02
MI-30	Planning approval for any development will have to be considered in terms of the requirements of the DoECLG guidance document The Planning System and Flood Risk Management - Guidelines for Planning Authorities (November, 2009).	T-W-02
MI-31	Proposed developments under the MWASP strategy should implement "green" building techniques to ensure waste minimisation and energy and resource consumption is controlled.	T-MA-01

Another integral part of the SEA process is the introduction of a monitoring programme which will require ongoing monitoring of key environmental indicators in order to assess the impact of the implementation of the MWASP strategies. The impact of the strategies will be assessed by determining the environmental impact as measured in relation to a set of Strategic Environmental Objectives (SEOs).

A set of "indicators" have been outlined, which will act as a measure of the impact of the MWASP strategies on the SEOs over the duration of the implementation of the MWASP strategies. Indicators have been chosen that are relatively readily available, quantifiable and that relate to the SEOs. The proposed monitoring programme is outlined in Table 6.9 MWASP SEOs, Indicators, Targets and Monitoring. It is considered that an Environmental Review Report will be prepared that will present the results of the environmental monitoring on a five yearly basis. This will ensure a quality record of the performance of MWASP in terms of the impacts on the SEOs over the lifetime of MWASP.

Table 6.9: MWASP SEOs, Indicators, Targets and Monitoring

OBJECTIVE TITLE AND CODE	TARGET/ ASSESSMENT CODE	DETAIL OF OBJECTIVE	INDICATOR	TARGET/ ASSESSMENT CRITERIA	MONITORING
Biodiversity, flora and fauna **(O-BFF)**	T-BFF-01	The Strategy alone or in combination should not significantly impact on valuable ecological habitats and species including European Designated Sites (SACs and SPAs), Nationally Designated Sites (NHA's) other designated sites (e.g. sensitive waters, bathing waters) ecological corridors or local sites	Conservation status of habitats and species as assessed every 6 years under Article 17 of the Habitats Directive and % of other valuable habitats and species due to implementation of MWASP strategies through trending of ecological surveys.	Estimated effects of development for which this plan provides a framework on protected sites.	Consultation with the National Parks and Wildlife Service, Inland Fisheries Ireland and the co-ordinating local authority for the River Basin District (where relevant) in order to identify changes in the ecological status of relevant habitats followed by quantitative analysis of relevant data..
	T-BFF-02	To ensure compliance with Article 10 of the Habitats Directive and protect ecological connectivity between Natura 2000 sites.	Percentage loss of areas of ecological connectivity as a result of implementation of MWASP strategies	Estimated effects of development for which this plan provides a framework on essential dispersal and migration corridors/ stepping stones between Natura 2000 sites.	Consultation with the National Parks andWildlife Service, National Biodiversity data Centre, Inland Fisheries Ireland and the co-ordinating local authority for the River Basin District (where relevant) in order to identify changes in the ecological status of relevant habitats followed by quantitative analysis of relevant data..
	T-BFF-03	The Strategy alone or in combination should not impact the biological diversity within the study area and to ensure that invasive species do not impact significantly on the biodiversity of the region there is no significant loss of valuable habitats and species not protected as European Designated Sites.	Percentage of valuable habitats and species lost in sites and the occurrence of invasive species not protected due to implementation of MWASP strategies through trending of annual/bi-annual surveys	To avoid having a significant impact on the integrity of regional scale biodiversity in the region.	Consultation with the National Parks and Wildlife Service, Inland Fisheries Ireland and the co-ordinating local authority for the River Basin District (where relevant) in order to identify changes in the ecological status of relevant habitats followed by quantitative analysis of relevant data. In addition consultation should be undertaken with Invasive Species Ireland (National Biodiversity Data Centre) to identify the status of invasive species.

OBJECTIVE TITLE AND CODE	TARGET/ ASSESSMENT CODE	DETAIL OF OBJECTIVE	INDICATOR	TARGET/ ASSESSMENT CRITERIA	MONITORING
Biodiversity, flora and fauna **(O-BFF)**	T-BFF-04	Aims to ensure that the strategy or proposals arising from the strategy do not result in the introduction of invasive species to the region.	Establishment of invasive species in areas where MWASP strategies have been implemented.	To avoid the establishment of invasive species in areas where MWASP strategies have been implemented and to promote the implementation of Codes of Practice where required	Consultation with the National Parks and Wildlife Service to identify the occurrence invasive species in the region followed by quantitative analysis of relevant data..
Population and Human Health (including Noise) (O-PHH)	T-PHH-01	The strategy should enhance the economic and employment opportunities within the area and should implement strategies that promote social and economic inclusiveness for those suffering economic and social exclusion. In addition the Strategy should increase accessibility to quality public, cultural and community services (recreational, social and educational) in particular for those who are physically or economically deprived.	In making this assessment, consideration will be given to the potential affects to quality of life and environmental quality of the study area arising from MWASP. Emphasis will be placed on economic regeneration within the core of the strategy development.	To promote social and economic inclusiveness.	Every 5 years during the lifetime of MWASP monitor data on the unemployment levels in areas impacted by high unemployment and social deprivation, where proposed elements of the transport networks have been implemented.
	T-PHH-02	The Strategy should promote the use of safer modes of public transport.	% change in road accidents in areas where MWASP strategies were implemented.	Increasing the attractiveness of public transport through enhanced safety measures.	A review of road and traffic related accident data should be undertaken every 5 years to identify % change in road accidents in areas where MWASP strategies were introduced.
	T-PHH-03	The strategy should minimise noise and vibration effects on sensitive receptors	% change in noise levels on transport routes in proximity to residential areas.	To ensure that the strategy does not result in significant population exposure to noise and vibration effects when compared with the existing situation	A review, every five years of the Local Authorities noise action plans and monitoring data to identify % change in road traffic generated noise along routes where MWASP strategies were introduced.
	T-PHH-04	The Strategy should promote healthy lifestyle choices in respect of transport mode selection.	% change in transport by walking or cycling in areas where MWASP strategies implemented.	Increase in healthy transport options utilised, such as cycling and walking	A review every 5 years of the % change in modal shift towards walking or cycling where MWASP strategies were introduced.
	T-PHH-05	The strategy should ensure that human health is protected from hazards or nuisances arising from exposure to incompatible land uses	% change in occurrence of respiratory diseases or conditions related to noise exposure in areas where MWASP strategies implemented.	Increase in efficient public transportation and effective land use zoning ensuring separation of hazardous land uses from residential areas.	A review of local area Health Status Reports every five years for areas where MWASP strategies were implemented.

OBJECTIVE TITLE AND CODE	TARGET/ ASSESSMENT CODE	DETAIL OF OBJECTIVE	INDICATOR	TARGET/ASSESSMENT CRITERIA	MONITORING
Water (O-W)	T-W-01	The Strategy alone or in combination should not impact on water quality (river, lake, transitional, coastal and groundwater) arising from the implementation of same	Change in water status of water bodies in proximity to areas where MWASP strategies implemented.	To ensure water bodies within the area where MWASP strategies are implemented are not precluded from compliance with the Water Framework Directive due to strategies and to ensure that the objectives and measures for waterbodies set out in the relevant River Basin Management Plan are complied with. .	Fiver year review of the Shannon International River Basin District Water Status for catchments in areas where MWASP strategies are implemented
	T-W-02	The Strategy should ensure that development occurs in areas not prone to flooding in the absence of appropriate mitigation and should be undertaken to ensure no risk of future flooding.	Change in area of land developed in high risk flood areas	To ensure compliance with the Floods Directive (2007/60/EC) and the National Flood Risk Management Guidelines.	A review (every 5 years) of OPW records of flood events in areas where MWASP strategies have been implemented and of development in high risk flood zones to ensure compliance.
Air Quality and Climate (O-AQC)	T-AQC-01	The Strategy should promote the improvement (through quality or reduction) in emissions to atmosphere arising from the transport infrastructure.	Change in emissions of transport related emissions in areas where MWASP strategies implemented.	A decrease in atmospheric pollution in the region related to transport emissions.	A review (every 5 years) of Limerick City Council Air Quality monitoring data to identify changes in air quality emissions. .
	T-AQC-02	The Strategy should minimise energy consumption and thus greenhouse gas (GHG) emissions, which contributes to climate change.	Change in ghg emissions in areas where MWASP strategies implemented.	A decrease in GHG emissions in the region related to transport emissions.	A review (every 5 years) of Limerick City Council Air Quality monitoring data to identify changes in air quality emissions and of EPA GHG inventories and emissions data.
Soils (O-S)	T-S-01	The Strategy should ensure the preservation of areas of Geological Heritage Importance	Change in area of Geological Heritage Areas within area where MWASP strategies are implemented.	To ensure conservation of areas of Geological Heritage Importance	The potential impact on geological heritage is project specific. A review every 5 years will be undertaken of Environmental Reports/ Environmental Impact Statements issued as part of planning approval applications to monitor any potential impacts on geological heritage.

OBJECTIVE TITLE AND CODE	TARGET/ ASSESSMENT CODE	DETAIL OF OBJECTIVE	INDICATOR	TARGET/ASSESSMENT CRITERIA	MONITORING
Cultural Heritage (O-CH)	T-CH-01	The Strategy must not impact on designated cultural heritage sites (e.g. National Monuments), areas of known potentially high archaeological importance, conservation areas and Protected Structures.	The potential for direct or indirect impacts on areas of Cultural Heritage Importance.	To ensure conservation of areas of Cultural Heritage Importance.	The potential impact on cultural heritage is project specific. A review (every 5 years) will be undertaken of Environmental Reports/ Environmental Impact Statements issued as part of planning approval applications to monitor any potential impacts on cultural heritage.
Landscape (O-L)	T-L-01	The Strategy should minimise impacts on the landscape character, and on designated, sensitive and protected landscapes. The Strategy will promote the integration of transport modes into the urban fabric rather than greenfield development	The potential for direct or indirect impacts on the landscape character, and on areas of landscape importance. Promotion of the and the use of brownfield development sites/ corridors rather than greenfield locations	To ensure conservation of areas of the landscape character and importance designated, sensitive and protected landscapes.	The potential impact on landscape will result from individual projects. A review (every 5 years) will be undertaken of Environmental Reports/ Environmental Impact Statements issued as part of planning approval applications to monitor any potential impacts on the landscape and visual amenity.
Material Assets (O-MA)	T-MA-01	The Strategy should minimise the demand on fossil fuels, and maximise the use of existing national, regional and local assets where appropriate whilst minimise the generation of waste	% change in imported fossil fuel usage in the area where MWASP strategies were implemented. Change in length of additional infrastructural assets (on Greenfield sites) and waste quantities generated by MWASP strategy led projects.	Maximising the use of existing infrastructural assets. Integrating access to public facilities and amenities. Minimising the use of finite natural resources and minimising the generation of waste.	A review of transport fuel consumption and C&D waste generation within the Mid-west area should be undertaken and reported on every 5 years and analysed in light of the implementation of MWASP strategies.

7 > NEXT STEPS

The lack of modern road and rail connectivity which the region has with Galway, Cork & Waterford requires immediate attention if the region and Atlantic Corridor are to achieve the economic balance sought for the country.

To achieve a balanced approach to development, including improvements to quality of life and social inclusion, regional rural transport forms will need to be revised, supported and implemented to promote sustainable development.

The Strategy is not intended to be an 'end-state', but rather the first substantial step in a rolling strategy that will help shape the future of the Mid-West Region.

7 > NEXT STEPS

The Strategy for the Mid-West area is designed to provide a land use and transportation planning framework to guide the sustainable spatial and infrastructure development of the Region to 2030. In so doing the strategy will be used to further inform the authorities' future social, physical, educational, economic, infrastructural spending programmes as well as statutory plans.

The Strategy is not intended to be an 'end-state', but rather the first substantial step in a rolling strategy that will help shape the future of the Mid-West Region. The Strategy will seek to provide a more sustainable future for the Region, supported by strong evidenced based research.

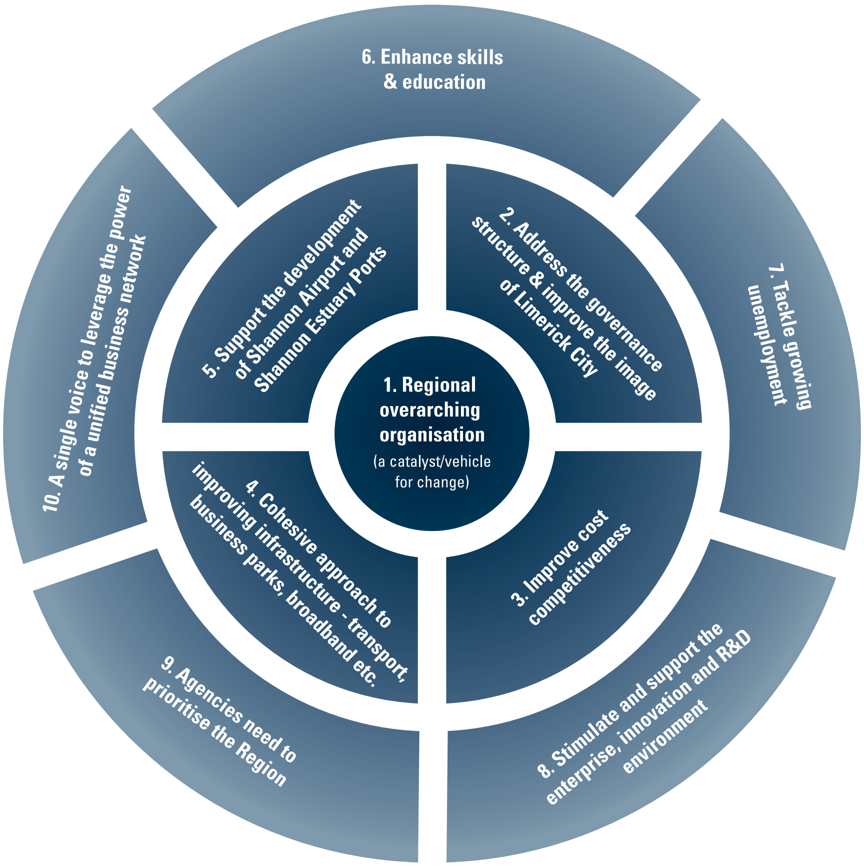
Formulation of the Strategy has been based upon a comprehensive assessment of the planning, land-use, transportation and economics of the Region. There has been a dramatic change in the economic stability of the country that has greatly impacted on the region and the ability to accurately predict in the short term. In the Region, there is high unemployment, greater settlement dispersal, incomplete infrastructure and a weak central core in Limerick city. Therefore, in view of the current economic circumstances and the requirement for value for money, for return on government investment already made, efficient and effective use of the existing transport infrastructure will be paramount. The short term objective must be to reverse the above trends and plan towards a more sustainable and competitive region for the long term. The strategy has been outlined to coincide with a population target of 500,000 for the Mid-West Region by 2030. In the event that this is not achieved within the timeframe, the fundamentals of the strategy will remain, as the basis of the recommendations are engrained in the population targets and the destination year. Therefore the strategy objectives will remain until such time as the population exceeds 500,000 or if internal and external forces on the region change dramatically.

The Mid-West Region, with Limerick City as its capital, will realise its potential as a gateway region by taking a course of action to address key issues of decentralisation, competition, transport, investment and job creation. Through a host of intertwined interventions the future of the region will become more economically balanced and deliver benefits for an enhanced quality of life, social equity and sustainability.

By already adopting the clearly defined direction on proposed population settlement targets, given in the 2010 Regional Planning Guidelines, the road to recovery has started. Following on, the evidence based assessment of the Mid-West Area Strategic Plan has outlined potential opportunities to further enhance this recovery. The strategy sets out a clear route to help achieve a stronger core and accessible region that are inter-dependent. The planning system has evolved a region of dispersed nature. Coupling this issue with recent government policy on transport has meant that individuals need to reconsider the necessity for travel, the distance to travel and the sustainability of the existing modes of travel used. The knock on effect is that there is a need to improve the balance and concentration more than initially envisaged of population growth in order to achieve greater success.

7.1 > ECONOMICS

The current economic down turn (2007-current) has affected the mid-west with rates of employment are less than the national average. A comprehensive economic strategy has therefore been developed to address the immediate issues and plan for the future needs. The strategy is summarised in the following diagram;



At the core of the region must be a far greater cooperative and integrated approach provided through a single voice that can champion the change. That change must include the way Limerick and the Mid-West is portrayed, have prioritised support for the region by the agencies and improve cost competitiveness.

The role of Shannon Airport must be improved and possible niche markets found to allow it further develop. The land resources comprising, the Shannon Airport land bank and Shannon Development Enterprise lands must be protected and exploited to maximise the job creation and development potential of this important hub of the region. Similarly, the availability of key land holdings available for development in the heart and periphery of the core city centre must be developed to create strong prioritised growth in the Gateway.

Given the future reliance on the private sector to create employment and as the markets change so too will the need for education, re-training, up-skilling and research as the current economic base is weak.

Based on a detailed review of the current enterprise base, employment trends in the Region and anticipated development and growth sectors at a national level, it is envisaged that there is scope for employment

7 > NEXT STEPS

growth in the international and national traded services sector and to a lesser extent in high-end manufacturing. The strategy highlights seven sectors for growth and potential job creation in the Region including: medical technologies and convergence with ICT; food; internationally traded services; logistics & supply chain management; energy and environmental sector and tourism. Other potential sectors for the region include forestry, renewable energy, maritime, commercial fishing/aquaculture mining and other domestically traded services which are likely to grow as the population increases and the economy improves.

While it is critical that Limerick City is developed as a strong urban core for the Region, the success of a City is dependent on a surrounding area and Region that is also prosperous. This relationship between the City and the Region needs to be further developed. In summary, an integrated and proactive approach will be required to grow the economic base, to develop the sectoral/business clusters and attract investment.

7.2 > SPATIAL STRATEGY

The core of the strategy remains the focus of strengthening Limerick Metropolitan Area, in particular the City Centre, and the implementation of a clear settlement hierarchy built upon the foundations of the National Spatial Strategy, the Regional Planning Guidelines and the Core Strategies of each local authority in the region.

The Gateway of Limerick-Shannon needs to continue to grow but at a faster rate than anticipated or planned for, particularly that of Limerick City Centre and the Limerick Metropolitan Area. The Metropolitan Area must increase the population percentage to at least 28% of the regions target of 500,000 population in the coming years and reverse the City Centre decline. The Gateway must command over 30% of the population and develop this as quickly as possible. In order to achieve this, the governance of the Limerick Metropolitan area must be addressed immediately and future commercial development must be predominantly focused into the heart of the City Centre.

Over the long term, the strategy proposes a role for Ennis greater than that previously considered. The Hub Town of Ennis will

continue to be embellished, to hold 7.5% of the population, and act as a strong catalyst and node of influence for the regional hinterland of Clare and connecting the gateways of Limerick/Shannon and Galway together in an economic corridor with strong infrastructure. The greater establishment and prominence of Nenagh and Newcastle West, to towns with population of over 12,000 and Roscrea to 7,500, can only but strengthen the current regional Limerick/Shannon and Ennis axis to provide a complimentary corridor to support better regional development and further balance to the region. Thurles will grow to a similar population and act as an economic hub to the western area of the North Tipperary region.

A further fourth tier of rural economic nodes have also been recognised that should see a doubling of population in these ten areas combined.

The spatial strategy for the Region will support the rural economy by the establishment of a hierarchy of local centres providing a range and level of service proportionate to their hinterland. Newcastle West, Nenagh, Thurles and Roscrea, while performing as development centres in their own right will also act as engines of growth in their surrounding hinterlands.

This in turn will support and be supported by the provision of an appropriate level of employment opportunities and services in a number of smaller settlements strategically located throughout the region. Due to geographical factors, their relative size and the existence of a rural hinterland:

- Population targets for a number of 'Rural Economic Nodes' (REN) are provided in Table 5.1. These centres have strategic locations within relatively densely populated rural areas. The REN category includes Kilrush, Scarriff, Ennistymon and Kilmallock; these settlements are Key Service Centres in the RPGs. The REN category also includes Templemore, Abbeyfeale, Sixmilebridge, Adare and Askeaton. The REN's are essential to the success of the MWASP strategy as they will act as focal points linking rural areas and larger urban centres.
- In this regard it is envisaged that Newcastle West will function in synergy with Rathkeale and Abbeyfeale.

These centres are identified for infrastructural investments and protected for inappropriate or unsustainable developments in their hinterlands which will undermine their role.

7.3 > TRANSPORT

To assess the strategy a comprehensive assessment evaluation tool, in the form of a regional transport multi-modal demand model, was developed. The model has been used to inform a transport strategy to support the economic, land-use and population targets for the regions population of 500,000. Given the circumstances of

- the rural nature of the region,
- dispersed employment centres,
- upgrades in national road infrastructure,
- low public transport usage,
- abundance of destination car parking facilities and
- scale and settlement pattern of population.

The provision of a 'big-ticket' public transport facilities, like light rail, new heavy rail or high speed rail, are unlikely to be needed in the foreseeable long term (30 years). However, the region still needs the significant investment to deliver much improved public transport and an extensive cycle network.
Unless there are major changes in the cost of private travel, the most that can be achieved in terms of supporting mode changes are smaller-scale projects supporting public transport and gradual modal shifts towards smarter travel. In those circumstances, a range of smaller-scale initiatives that will help to improve the image of public transport, better the service offering and the culture around its use would be the most appropriate. This will give added value to social inclusion and remap the services to give better accessibility, integration and connectivity.

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If, in the longer term, the culture does change and the economics of private car travel becomes substantially altered, then more significant investment might be justified. Changes may also be brought about through acceptance or requirement for inclusion of demand management measures, like car park levies and congestion charging, to support the changing agenda.

Whilst it is acknowledged that there is a serious disconnect and imbalance in the provision of public transport for the region the main thrust of public transport investment must be guided to the major urban conurbation of Limerick Metropolitan Area where the proposed investments can lead to potential to achieve Smarter Travel policy objectives and mode splits, when walking and cycling are included.

Certainly, if the population and settlement targets outlined in MWASP are realised there will be significant opportunity for better non-private car movement and the promotion of bus rapid transit should be able to grow the market share in Limerick Metropolitan Area. However, it is important to support the strategic economic settlement and development dynamic of the region with accessible transport. To achieve a balanced approach to development, including improvements to quality of life and social inclusion, regional rural transport forms will need to be revised, supported and implemented to promote sustainable development. These will also need to be supported with smarter travel infrastructure as there is a deficit in most sizeable towns.

Even without the use of the transport model it is very evident that the competitiveness of the region is impacted upon by poor accessibility and lack of appropriate road infrastructure Therefore, within the hinterland region there will continue to be a requirement for good quality road infrastructure in order to facilitate accessibility, connectivity and safe passage. Rural movement, as important as it is in this region, must be complimented with appropriate connectivity to the National Road network. Connections are important in order to strengthen links and increase competitiveness, through secure and safe routes.

The lack of modern road and rail connectivity which the region has with Galway, Cork & Waterford requires immediate attention if the region and Atlantic Corridor are to achieve the economic balance sought for the country.

With the proposed growth of Newcastle West, as a key urban agglomeration in the region, there is a renewed requirement to reconsider the upgrading of the N21. This should be reconsidered in the context of the N69 and how the two routes could facilitate the growth and movement in the south-west quadrant of the region, including the provision of connectivity to industrial and employment lands along the estuary.

The unconfirmed future role of Shannon Airport and the lack of national aviation policy give further rise to uncertainty of investment in the region, including that of the Airport and potential to further develop international freight logistics. The strategy promotes the role of Shannon Airport and the industries associated within the Shannon Free Zone.

Protection of the rail corridor to support the future growth potential of Shannon Airport must be ensured and also considered in the assessment of possible high-speed rail lines for the country. Shannon Airport requires support to promote a significant upgrade of its public transport facilities and services to encourage a more sustainable alternative to the car. This investment must not alone target the home market requirements but also compliment the tourist requirements to choose public transport options to tour the region.

Although rail corridors feature heavily in the region there is a very disappointing level of usage in terms of passengers or freight. There is no doubt that the western rail corridor, through Colbert Station and onto Limerick Junction performs a reliable and essential service connecting the region and city to both Dublin, Galway and Cork, if not directly. A more comprehensive study should be undertaken to look at the Limerick-Ballybrophy line to understand the potential business case options available and also how best to grow market share in the medium and long-term given the proposed growth of Nenagh and Roscrea and the potential for future high-speed rail line connections between the urban agglomerations.

The development of high speed direct rail connections from Limerick (Colbert Station) to Dublin, Cork and Waterford could be investigated further, so as to complement the development of the NSS, RPG and Atlantic Corridor Strategies such studies include both Freight and Commuter traffic.

The substantial public investment packages, outlined in Scenario 2 and 3 intervention measures, will bring substantial economic, social inclusion and supporting infrastructure to achieve a more robust core, stronger hinterland and accessible region that can achieve a significant increase in public transport usage and strive for transport policy targets in the core. This will also need to be supported by adequate road infrastructure serving the region and connectivity to Dublin and along the Atlantic Corridor.

7.4 > KEY RECOMMENDATIONS

In summary, the following are a list of key recommendations under the key headings incorporated in the development of the Strategic Plan.

7.4.1 > ECONOMICS

- A more streamlined corporate governance structure to achieve a better platform for Limerick Metropolitan Area to achieve its potential. This objective can be assisted with the amalgamation of the two Limerick local authorities.
- Government direction on the long-term future role for Shannon Airport and development of a long term strategic business plan for the Airport, Shannon development Lands and Shannon Estuary
- The need for education, re-training, up-skilling and research as the current economic base is weak
- greater cooperative and integrated approach provided through a single voice that can champion the change

7.4.2 > LAND USE

- The promotion of the Metropolitan City as the economic driver for the Region with a focus on the rejuvenation of the central area to develop as a place of quality for citizen, worker and visitor;
- Develop Shannon and Ennis as complementary settlements pending a better balance of employment and population levels between the two;
- Promote a role for Nenagh to provide support services and facilities for the Metropolitan Area given the proximity afforded by the M7;

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- Provide key settlements at NCW, Thurles and Roscrea to act as service centres for the rural hinterland;
- Develop rural economic and settlement nodes at strategic locations in the rural area of the Region to provide key services and provide a more sustainable compact settlement pattern.

7.4.3 > TRANSPORT

- Completion of the Atlantic Corridor transport connections to Cork, Galway and Waterford in accordance with the national and regional policies.
- A revision of the public transport system and subsequent investment to achieve a more sustainable, accessible and competitive region
- Publication of the National Aviation Policy outlining the role of Shannon Airport in a national context
- Support for the sustainable upgrading of the National Secondary and Regional Road network that functions as a key transport network in the region.
- Comprehensive review of the future rail corridors as part of a long term possibility of implementing high-speed rail line connections between the cities in Ireland.

7.5 > MOVING FORWARD

Planning

- Review County, Town and Village Plans, where appropriate, to allow for the fulfilment of key roles identified in the RPGs Settlement Strategy and in the Core Strategies for each local authority area.
- Prepare integrated plans for the development clusters identified in the Metropolitan City to promote sustainable transport, employment and residential investments.
- Prioritise infrastructural investment for the provision of water supply and sewage facilities.
- Develop rural settlement policies that sustain the indigenous rural communities in the Region, with support for rural enterprise and local rural population; but that strictly control the incidence of urban generated housing.

Transport

- Assign a Travel Plan Co-ordinator for each of the counties
- Develop smarter travel plans for each of main settlement locations in the region
- Devise a series of destination travel plans for key attractors in the region
- Restructure the bus networks to form an integrated and seamless public transport offering
- Investigate the potential for public transport interchange, possibly at rail nodes, in each of the main towns and a bus interchange facility in the City Centre of Limerick
- Establish a long term implementation plan to assist the phased development of a number of national primary and national secondary routes in the region in accordance with the policies and objectives of the Mid-West Regional Planning Guidelines.
- Revise the role of Rural Transport to become better integrated into the public transport offering
- Prioritise the changes in Limerick City's streetscape to accommodate more sustainable modes following the removal of through traffic since the Southern Ring Road opened.
- Provide improved public transport information.
- Complete the Atlantic Corridor Road Network in accordance with national and regional policies.

Sections 7.6.1 and 7.6.2 set out a number of potential transport measures which have emerged from the modelling analysis and public consultation exercises which were undertaken as part of MWASP. They are set out in terms of their priority and the costs are indicative only. Their implementation will be subject to further detailed investigation in terms of affordability, value for money and technical and operational feasibility. They will be examined in conjunction with the relevant statutory agencies (Bus Éireann, CIE, Irish Rail, NRA, NTA) and will be implemented as part of ongoing investment packages such as Smarter Travel.

7.6 > TRANSPORTATION PLAN SCENARIO OPTIONS

7.6.1 > SCENARIO 1 (DO NOTHING)

Scenario 1 was the 'Do-Nothing' scenario to establish baseline conditions and does not include new transport measures.

7.6.2 > SCENARIO 2 (DO-SOMETHING LOW COST)

Table 7.1: Scenario 2 (Do Something Low Cost) – Recommended Transport Implementation Plan

			TIMESCALE		
REF NO.*	MEASURE	2010 CAPITAL COST (€M)	SHORT-TERM	MEDIUM-TERM	LONG-TERM
Bus Services					
S2BS1	Limerick city Bus Éireann service simplification	€0.4	■		
S2BS2	Enhance existing Shannon-Limerick services	€1.1	■		
S2BS3	Rail/Air Shuttle Sixmilebridge-Shannon	€0.2	■		
S2BS4	Cross-city bus services (to complement QBC/BRT routes)	€1.2	■		
S2BS5	Reconfigure regional Bus Éireann network	€0.5	■		
S2BS6	Enhance Expressway route 12 (Dublin - Roscrea - Nenagh - Limerick)	€0.4	■		
S2BS7	"Collect and Connect" taxi feeder services to public transport interchanges	€1.5	■		
Bus Infrastructure					
S2BI1	First showcase cross-city bus corridor (QBC/BRT)	€9.5	■		
S2BI2	Second showcase cross-city bus corridor (QBC/BRT)	€23.5	■		
S2BI3	Third showcase cross-city bus corridor (QBC/BRT)	€9.8		■	
S2BI4	UTMC system for Limerick city and environs	€2.0	■		
S2BI5	Ensure RTPI compatibility for all buses	€0.3	■		
S2BI6	SVD at all signal controlled junctions in Limerick, Ennis and Shannon (AVL)	€0.4	■		
S2BI17	City Centre, Limerick public transport interchange improvements	€10.0	■	■	
Heavy Rail Services					
S2HR1	Refurbishment of Limerick Colbert station	€15.0	■		
S2HR2	Promotion of rail services on the Limerick-Nenagh-Ballybrophy line to increase public transport usage for work, education and other trip purposes between settlements	€3.1	■		
Car Parking					
S2CP1	Bus-based Park & Ride N of R510/R526 Loughmore Rbt, Ballycummin	€9.4	■		
S2CP2	Bus-based Park & Ride at Milltown (M7 Limerick Bypass, N24 Ballysimon Rd)	€12		■	
S2CP3	Bus-based Park & Ride site N of M18 Clondrinagh Rbt	€14.3		■	
S2CPX4	Small scale Park & Ride/Park & Share sites (10 locations)	€2.0	■		

** This reference relates to a specific input into the traffic model as prepared to inform the development of the strategy.*

			TIMESCALE		
REF NO.*	MEASURE	2010 CAPITAL COST (€M)	SHORT-TERM	MEDIUM-TERM	LONG-TERM
Public Transport Information					
S2PTI1	Mid-West Region/Limerick City Public Transport Map and Guide	€0.2			
S2PTI2	Printed information displays (branded) at all Limerick city bus stops	€0.5			
S2PTI3	Improved signing to major public transport interchanges	€0.1			
S2PTI4	Promote new ticketing products	€0.1			
Smarter Choices					
S2SMC1	Assign Travel Plan Co-ordinators (five years) for each local authority area	€0.9			
S2SMC3	Launch Limerick City Car Club	€0.3			
S2SMC4	Cycle parking facilities	€1.0			
S2SMC5	Develop Limerick Cycle Network	€20.0			
S2SMC6	Implement Smarter Travel Pilot Projects in 10 rural towns of various scales	€2.5			
S2SMC7	Develop Region Wide Cycle Network including signage, mapping and connectivity to Rural Network Trails	€5.0			
Additional Schemes					
AS01	RTPI for Limerick	€2.0			
AS02	Limerick Green Routes and bus priority measures	€20			
	Total Costs**	**€169.1**			

** This reference relates to a specific input into the traffic model as prepared to inform the development of the strategy.*
*** The capital estimates provided are notional capital values as sourced from* MWASP Public Transport Feasibility Study, Mott MacDonald, June 2012.

7.6.3 > SCENARIO 3 (DO-SOMETHING HIGH COST)

Scenario 3 is in addition to Scenario 2 measures.

Table 7.2: Scenario 3 (Do Something High Cost) – Recommended Transport Implementation Plan

			TIMESCALE		
REF NO.*	**MEASURE**	**2010 CAPITAL COST (€M)**	**SHORT-TERM**	**MEDIUM-TERM**	**LONG-TERM**
Bus Services					
S3BS1	Increase scheduled bus frequencies from Scenario 2	€10.2			
S3BS2	Limerick Orbital service	€1.5			
Bus Infrastructure					
S3BI5	Upgraded bus stops Coonagh Rbt - Shannon – Ennis	€0.9			
S3BI7	Public realm and bus facility improvement William St/Roches St/Henry St/Parnell St/ O'Connell St, Limerick	€25.0			
S3BI8	Bus gate Lord Edward St, Limerick	€0.1			
S3BI11	Shannon Airport public transport interchange improvements	€5.0			
S3BI13	Public transport interchange improvements (bus, rail or both) in Nenagh, Thurles, Newcastle West, Roscrea to include seating real time timetables, electronic ticket purchasing, designated parking for buses, bicycles and cars, and associated upgrading of the hard and soft landscaping around the stations.	€10.0			
Car Parking					
S3CP1	Limerick Parking Management Strategy	€1.0			
S3CP2	Limerick routeing/signing strategy	€2.4			
Smarter Choices					
S3SMC1	Workplace Travel Plans (appoint additional Travel Plan Co-ordinators (five years))	€1.5			
S3SMC2	Establish Area Travel Plan Networks (five years)	€1.1			
S3SMC3	School Travel Plans (five years)	€1.5			
S3SMC4	Individualised Travel Marketing	€10.0			
S3SMC5	Travel Plans for Limerick Colbert Station and Ennis Bus/Rail Station	€0.2			
Walking and Cycling					
S3WC1	Shared use cycleways/footways beside strategic roads	€20.0			
S3WC2	Cycle lanes on residential roads	€5.0			

** This reference relates to a specific input into the traffic model as prepared to inform the development of the strategy.*

			TIMESCALE		
REF NO.*	MEASURE	2010 CAPITAL COST (€M)	SHORT-TERM	MEDIUM-TERM	LONG-TERM
Walking and Cycling					
S3WC3	Advanced stop lines at signal junctions where appropriate	€2.0			
S3WC4	Raised pedestrian priority crossovers on minor road arms at appropriate locations	€5.0			
S3WC5	Conversion of signal controlled pedestrian crossings to raised zebra crossings at appropriate locations.	€5.0			
S3WC6	Provision of raised zebra crossings on roundabout arms where appropriate	€5.0			
S3WC7	Cycle racks on Limerick city/regional buses	€0.1			
S3WC8	Limerick Public Use Bicycle Scheme	€0.5			
S3WC9	Off-street cycle/pedestrian Greenways linking employment, residential and commercial areas	€31.3			
Freight					
S3FR1	Pilot Freight Transhipment Centre for Ennis Town centre	€2.0			
S3FR2	Limerick Freight Quality Partnership (five years) + Freight Management Strategy for Limerick City Centre	€2.2			
Demand Management					
S3DM4	Mid-West speed limit review	€5.0			
	Total Costs**	**€153.5**			

** This reference relates to a specific input into the traffic model as prepared to inform the development of the strategy.*
*** The capital estimates provided are notional capital values as sourced from MWASP Public Transport Feasibility Study, Mott MacDonald, June 2012.*

7.6.4 > STRATEGIC NATIONAL AND NON-NATIONAL ROAD OPTIONS

Strategic road national and non-national road schemes proposed within the Mid-West region are detailed below. These upgrades have been proposed for a variety of strategic reasons which include completing the Atlantic Corridor, strengthening the national spatial strategy objectives, improving local and regional access, and improving the tourist routes.

As discussed in Section 5.4.4, prioritisation of these road schemes will consider financial, environmental and spatial issues. These schemes will be subject to review of the National Transport Authority, National Roads Authority and the Department of Finance Project Appraisal Guidelines and the findings of full environmental and habitats assessment in consideration of legislative obligations.

Table 7.3: Strategic National and Non-National Roads

NATIONAL ROADS

Clare County

- Upgrading of N67 Atlantic Corridor from Miltown Malbay to Killimer ferry – connectivity from Clare to County Kerry to promote tourism;
- Upgrading of N67 from Ennis to Kilrush to promote connectivity between the economic hubs;
- Upgrading of N68 direct route from Ennis (Hub Town) to Ennistymon (transport) node;
- Upgrade of the N85 Western Relief Rd, Ennis to Ennistymon N67.

North Tipperary County

- Upgrading of the N52 from Nenagh to the Midlands town Athlone/Dundalk/Belfast;
- Provision of a link between the N52 and the R445 (east of Nenagh);
- Upgrading of the N62 from the M8 through Thurles and Templemore;
- Upgrading of the N75 from Thurles to M8;
- Upgrading of the N65 Borrisokane to Portumna Road.

Limerick City

- Upgrading M20 & N24 from Limerick City to Cork and Waterford cities/ Gateways.

Limerick County

- Upgrading M20, & N24 from Limerick City to Cork and Waterford Cities/Gateways through Limerick County;
- Provide Northern Distributor Road linking the M7 to M18 and northern suburbs;
- Upgrade of N69 from Limerick to Foynes Port to motorway standard;
- Review corridor improvements and connections for the M21 providing access from Limerick to Newcastle West and Kerry via the planned Adare Bypass. Consideration to be given to linkages between the N69 to N21.

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REGIONAL ROADS

Clare County

- Northern Distributor Road;
- Upgrade of R352 – Ennis to Scariff/Killaloe to provide improved access to Gateway and Hub;
- Upgrade of R494 and Killaloe/Ballina Bypass and 4th River Shannon crossing to facilitate access from North west of region to M7;
- Upgrading of the R460, R463, R473, R474, R478, R479 ,R484, R485 and R487 in Central, South and West Clare.

North Tipperary County

- Provision of Thurles outer relief road providing an improved link to the M8;
- Provision and upgrading of the R503 link road between Thurles to Limerick City;
- Upgrading of the R438 Borrisokane to Athlone Road;
- Upgrade of R494 and Killaloe/Ballina Bypass and 4th River Shannon crossing to facilitate access from North west of region to M7;
- Provision of an inner link road on the south east side of Thurles linking the N62 to N75 to relieve congestion in the town centre;
- Upgrading the R498 link road between Thurles and Nenagh and connection to the M7 Nenagh bypass.

Limerick City

- Provide Northern Distributor Road linking the M7 to M18 and northern suburbs;
- Prove for the upgrade of Childers Road and ancillary junctions;
- Upgrading roads to regeneration areas.

Limerick County

- Upgrade of the R515 (Abbeyfeale to Charleville);
- Upgrade the R518 link between Kilmallock and M20 Limerick/Cork.

7.7 > COMMITMENT TO MWASP

MWASP has been developed to provide strategic direction for infrastructure and land use planning in the Mid-West region and for the achievement of key regional objectives, including the revitalisation of Limerick City, the effective implementation of the Regional Planning Guidelines, the sustainable development of enterprise and employment, and the delivery of critical infrastructure projects.

Implementation of MWASP will help the region to overcome existing and future transport challenges and will make a significant contribution to the creation of a more competitive and sustainable region socially, economically and environmentally.

It is intended that MWASP will be reviewed periodically and amended where necessary in order to ensure that it remains current and relevant to the needs of Limerick City and the Mid-West Region in general.

8 > ACKNOWLEDGEMENTS

8 > ACKNOWLEDGEMENTS

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Steering Group Members
Mr Tom Mackey, Limerick City Manager,(Chair) (Retired Feb 2012)
Mr Kieran Lehane, City Manager (Chair) (March 2012 to August 2012)
Mr Conn Murray, Limerick City & County Manager (August 2012)
Mr Joe McGrath, County Manager, Tipperary North County Council
Mr Liam Conneally, Director, Mid-West Regional Authority
Mr Paul Hannon, Department of Transport (to end of 2009)
Mr John McCarthy, Department of Transport (2010 onwards)
Ms Clare Finnegan, Department of Transport (2010 onwards)
Ms Gabrielle McKeown, Department of Environment
Mr Gerard Dollard, Director of Services, Clare County Council
Mr Matt Short, Director of Services, Tipperary North County Council
Mr Tom Enright, Director of Services, Limerick County Council
Mr Gerard Sheeran, Acting Director of Services, Limerick County Council
Mr Pat Dromey, Director of Services, Limerick City Council (Retired November 2010)
Mr Oliver O'Loughlin, Director of Services, Limerick City Council (Nov. 2010 to Jan 2012)
Mr Paul Crowe, Director of Services, Limerick County Council
Mr Vincent Murray, Senior Engineer, Limerick City Council

Working Group Members
Mr Pat Dromey, Director of Services, Limerick City Council (Chair, Retired November 2010)
Mr Oliver O'Loughlin, Director of Services, Limerick City Council, (Chair, Nov. 2010 to Jan 2012)
Mr Liam Conneally, Director, Mid-West Regional Authority (MWRA)
Mr John Bradley, Senior Planner, Clare County Council & Mid-West Regional Authority
Mr Gordon Daly, Senior Planner, Clare County Council
Mr Tom Tiernan, Senior Engineer, Clare County Council
Mr Gerard Sheeran, Senior Planner, Limerick County Council
Mr Pat O'Neill, Senior Engineer, Limerick County Council
Mr Brian Beck, Senior Planner, Tipperary North County Council
Mr Michael Hayes, Senior Engineer, Tipperary North County Council
Mr Dick Tobin, Senior Planner, Limerick City Council & MWRA (Retired 2011)
Mr Kieran Reeves, Acting Senior Planner, Limerick City Council
Mr Vincent Murray, Senior Engineer, Limerick City Council
Mr Tim Fitzgerald, Senior Engineer, Mid-West National Roads Design Office

Mid-West Region City and County Managers
Mr. Joe MacGrath, MWRA Designated County Manager and North Tipperary County Manager
Mr. Alec Fleming, Clare County Manager (retired)
Mr Terry O'Niadh, North Tipperary County Manager (retired)
Mr Ned Gleeson, Limerick County Manager (retired)
Mr Conn Murray, Limerick City and County Manager

Project Consultant
Mr Sean Doherty, Mott MacDonald
Mr Paul Kelly, Mott MacDonald
Mr Stephen Hartrich, Mott MacDonald
Mr Tom van Vuren, Mott MacDonald
Mr Colin McGill, McGill Planning
Ms Jennifer Gillen, PwC
Ms Anne O'Connell, PwC

Elected Members of the four local authorities and the Mid West Regional Authority

Organisations/Individuals who were consulted/made submissions, included:
National Transport Authority
Department of the Environment, Community and Local Government
Department of Transport
Department of Arts, Heritage and the Gaeltacht
Department of Agriculture, Food and the Marine
Mr Warren Whitney
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National Roads Authority
Mid-West Regional Authority
Dublin Transportation Office
Bus Eireann
Irish Rail
Shannon Airport Authority
Dublin Airport Authority
Shannon Foynes Port Company
Shannon Development Agency
Enterprise Ireland
Failte Ireland
Health Services Executive
An Garda Siochana
Department of Education
University of Limerick
Limerick Institute of Technology
Limerick Northside Regeneration Company
Limerick Southside Regeneration Company
Irish Farmers Association
Industrial Development Authority
Environmental Protection Agency
Waterways Ireland
Chambers Ireland
IBEC
ISME
Ballyhoura Development
Irish Cattle and Sheep Farmers' Association (Limerick Branch)
Zinc Properties Ltd
Great Southern Trail
Atlantic Force Hydro Ltd
Joseph Murphy Builders
RR Donnelley
Limerick Port Users Group
RG Data
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Limerick Cycling
Limerick Earth Day
Shannon Protection
Union of Students Ireland
General Public

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