LIMERICK SHANNON GATEWAY REPORT

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Preface

This report is one in a series of nine assessing the socio-economic performance of individual Gateways as designated under the National Spatial Strategy (NSS) 2002-2020. This series serves as both an update and progression of the Gateway Development Index (GDI), which was originally compiled and published in 2009. It builds upon the initial study using previously established domains and constituent indicators (or suitable alternatives where necessary and appropriate), as well as expanding the Index to encompass the Hub towns for the first time. Accordingly, the Index is hereinafter referred to as the Gateways and Hubs Development Index (GHDI) 2012.

Each report presents the updated findings for the relevant Gateway (a Hubs report is also available) using the latest available datasets in 2012, in the form of an Index, based upon the evaluation of all of the Gateways and Hubs within a series of domains and indicators. For reasons of comparability, these datasets were prepared and analysed for both 2006 and 2011. The domains and indicators were, for the most part, previously defined and used within the GDI 2009 report, while some minor adjustments have been introduced.

It is important to note that the geographic boundaries upon which the indicators are formulated have changed in all cases. It should also be noted that although both the GDI 2009 and the GHDI 2012 utilise largely the same indicators, they are however not directly comparable due to changes in the boundaries of the various Gateways and Hubs as defined by the CSO POWSCAR dataset. The GHDI 2012 therefore will compare the performance of the Gateways and Hubs in 2011 and 2006 by retrospectively applying the new framework to the GDI 2009. This is set out in the series of reports. In addition, the findings of a comprehensive perception survey complement the detailed domain analysis.

It should be noted that, for the purposes of the GHDI study (which is primarily tasked with measuring and monitoring the economic and social performance of each Gateway given the context of their prescribed NSS role, and the EU Co-Financed Regional Operational Programme investment), two 'Zone' boundaries have been determined to further inform the analysis, these are defined in such a manner that:

- Zone 1 reflects the urban cores, i.e. the relevant cities and towns and their environs as defined by the CSO (2011); and,
- Zone 2 consists of the wider Gateway catchment or functional area, where in excess of 20% of the residents in employment commutes to the urban core (Zone 1) to work. The Zone 2 areas may extend beyond the administrative boundaries of each Gateway settlement. In many cases, this has resulted in large parts of the surrounding rural hinterland also being included within the study area, which reflects the influence and economic reach of the Gateways. Accordingly, the population findings within Gateway reports should not be directly compared with Regional Planning Guidelines (RPG) population targets (as set out within the RPGs and development plans).

2 Reports have been compiled for each of the nine Gateways, with a single report to include all of the Hubs, and a summary Gateway and Hubs Development Index Report
3 A new domain, ‘Crime’ replaces ‘Social Facilities and Networks’ as a measure of human capital. The 2009 GDI domain ‘Social Facilities and Networks’ was largely based on crime statistics in any event. In addition, some minor indicator adjustments have been introduced to some indicators within domains.
The CSO derived boundaries of cities/towns (Zone 1) will not always capture the full extent of the influence of the Gateway/Hub as a number of large employment nodes are located outside of the defined boundaries e.g. Dublin Airport and Shannon Industrial Zone. CSO POWSCAR data is used in the Index to ensure and enable consistency of analysis across all Gateways and Hubs. However anomalies such as those identified may arise.

It should be noted that the remit and scope of this report is focused upon examining the economic and social performance of both the Gateways and Hubs and does not seek to catalogue or identify all investments delivered under national, regional and local investment programmes (information which is publicly available).

The reports are the outputs to a study which is co-funded by the European Regional Development Fund (ERDF) under the Regional Operational Programmes 2007-2013 undertaken on behalf of the Border, Midland and Western Regional Assembly and the Southern and Eastern Regional Assembly by Future Analytics Consulting, in conjunction with Behaviour and Attitudes. A steering committee, consisting of representatives from the following bodies guided the overall study.

A series of stakeholder workshops were organised by the BMW and S&E Regional Assemblies, and conducted with the assistance of Future Analytics Consulting and Behaviour and Attitudes (a list of those who attended is set out in Appendix 2). The feedback from these workshops was instrumental in informing the compilation and presentation of the final reports. The Steering Committee would like to sincerely thank all those who attended the workshops and contributed to the overall project outputs.
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1.0 Introduction

1.1 Gateway Context

Located on the banks of the Shannon River, the city of Limerick is the third largest city within the Republic of Ireland, and the largest urban area within the Mid-West region. Under the 2002 National Spatial Strategy, Limerick city and the adjacent town of Shannon have been designated as a Gateway, which can be seen as a logical progression of the relationship which exists between these two urban centres. Despite the fact that they are located within different counties, 19km apart, both have become interdependent upon each other, with their complementary functions contributing to a combined strength, allowing them to function almost like a single unit, and to become a key driver for economic growth within their region.

Like Waterford, Limerick was founded by the Vikings in the 10th century in contrast Shannon is one of Ireland’s youngest towns, having being established in the 1960s from reclaimed marshlands. Shannon is unique in that it is home to the Shannon Free Zone, which is a multi-sectoral business park, housing more than 100 companies and support around 6,000 jobs\(^4\), in addition to the 3rd largest airport (in terms of passengers) in the Republic of Ireland. Sport is an important element in the cultural identity of the Gateway, with both Gaelic games and rugby enjoying widespread support; indeed it was awarded the title of European City of Sport during 2011\(^5\).

Since the introduction of the NSS in 2002, work has been carried out in Gateways and Hubs providing both hard and soft infrastructures to allow them to unlock their potential. Since the 2009 report was published there have been further improvements to the infrastructure linking Limerick and Shannon (the N7 Limerick Tunnel), as well as linking the Mid-Western region with the rest of the country (the N7 Dublin-Limerick motorway). The Gateway has also become an important centre for education, with University of Limerick having benefited from both capital and current investment in recent years\(^6\) as well as Limerick Institute of Technology; there were 19,067 students enrolled in third level institutions such as these in 2011. Shannon is also an important international transportation hub, with the Shannon Foynes Port, which has the second largest port operation within the Republic of Ireland\(^7\), and Shannon Airport providing vital European and Trans-Atlantic routes to and from the region. The recent announcement of the separation of Shannon Airport from the Dublin Airport Authority (DAA) and the planned merger with a restructured Shannon Development will enhance the long term viability of the Airport as well as to provide a large number of employment to the Gateway\(^8\).

Limerick and Shannon have proven that they have the potential to be a successful Gateway but, in order to continue to address the issues which they face, it is important that they focus available resources into areas which represent a good return on investment. With this in mind, continued investment in infrastructure projects aimed

\(^4\) http://www.shannonireland.com/media/Media.11813.en.pdf
\(^5\) http://www.irishsportscouncil.ie/Media/Latest_News/2011/EU_City_of_Sport_Status_to_Boost_Limerick’s_economy.html
\(^6\) Atlantic Philanthropies, founded by Chuck Feeney has been responsible for providing much of the capital required to enhance the facilities of the University of Limerick in the last number of years: http://www.ul.ie/news-centre/news/university-of-limerick-honours-chuck-feeney-with-eight-other-irish-universi
\(^8\) As reported in http://www.irishtimes.com/newspaper/breaking/2012/1203/breaking23.html
at increasing the attractiveness of the Gateway, as a place to live, work and do business in, must be seen as key to its future success.

In the 2009 Gateway Development Index (GDI)\(^9\), it was found that the performance of the Limerick-Shannon Gateway was below that of some other Gateways, with an overall score of \(4.8\)\(^10\). The Gateway demonstrated positive results in the Crime and Knowledge and Innovation domains, while the Enterprise and Employment and Health and Wellness domains demonstrated a need for improvements in performance. In the 2012 GHDI, the Limerick-Shannon Gateway returned a score of \(4.8\), illustrating that there has been no change on the 2009 score.

### 1.2 Use of POWSCAR Data

The boundaries of the Limerick-Shannon Gateway have been defined using the Central Statistics Office (CSO) Place of Work, School or College Census of Anonymised Records (POWSCAR) data derived from the 2011 Census. Each Gateway is divided into two specific Zones for analysis, with **Zone 1** defined as the city, legal town or small town and environs (as defined by the CSO, 2011), while **Zone 2** has been defined as consisting of District Electoral Divisions (DEDs) where in excess of \(20\%\) of the resident population in employment commutes to the Gateway urban core for work. The use of POWSCAR data facilitates an understanding of the functional area of the Gateway, to examine its economic reach and to ascertain how it is acting as a driver of growth based on its NSS-identified role. Although the Gateway boundaries were defined from POWSCAR data, for the purposes of this analysis, data for travel to schools and colleges was not utilised. The rationale for this was to replicate as closely as possible the approach taken in the previous GDI boundary definitions as the travel to schools and colleges was not included in the POWCAR 2006.

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\(^9\) In order to facilitate comparison between the GHDI 2012 and the GDI 2009, the 2009 Index has been remapped across the 2011 Census boundaries to produce a comparative Index.

\(^{10}\) The 2009 GDI can be accessed at: [http://wwwỊbmwassembly.ie/publications/other_reports/BMW_GDI_Report.pdf](http://www.Ịbmwassembly.ie/publications/other_reports/BMW_GDI_Report.pdf)
The extent of the functional area of the Limerick-Shannon Gateway in 2012 remains largely unchanged to that identified in 2009; 
Zone 2 can be seen to encompass much of county Limerick, as well as sizeable proportions of south county Clare, and west county Tipperary.
1.3 Use of GeoDirectory Data

GeoDirectory 2012 is a service, jointly established by An Post and Ordnance Survey Ireland, which provides a complete database of all of the buildings in the Republic of Ireland and their geolocation details. It holds records for 1.8 million properties. The database is regularly updated and no legacy or previous versions are retained. In this case the GeoDirectory 2012 (used under licence), provides a snapshot for a particular point in time (Q1 2012). The GeoDirectory 2012 has been utilised in this project to determine the level of retail activity and the sectoral base/provision of services in the Gateways (and Hubs).

11 The Q1 2012 version of GeoDirectory 2012 ‘has been frozen’ such that it can be considered in any future review and update of the Gateways and Hubs Development Index.
2.0 Policy Context

2.1 The Importance of Policy for Balanced and Sustainable Regional Development

It is important to establish and review the spatial and socio-economic policy and guidance frameworks which have had a bearing on the development and performance of the Gateways and Hubs since their roles were established in the National Spatial Strategy 2002-2020 (NSS)\(^2\) to date. Given that a range of strategic national, regional and local-level policies have influenced the performance of these designated Gateways and Hubs, understanding their effects, both positive and negative is seen as an important step in informing the future direction of regional policy in Ireland.

Nationally, Gateways are expected to act as strategically placed engines of growth to enable its regions and by extension the country to grow to its potential, within a national spatial and forward planning framework. With a strategic location both nationally and relative to their surrounding environs, Gateways act as the main providers of the area’s social and economic infrastructure and support services. At a regional level, Gateways are positioned to guide more balanced regional development and therefore ensuring their continued development should inform capital investment priority decisions. They should facilitate their functional areas to harness their potential and provide a framework for coordinating local planning (for example, alignment of population targets with Gateways objectives, etc), while also strengthening the relationship between urban and rural areas, and promoting sustainable forms of development. The Gateways, supported by nine designated Hubs, have been the main drivers of the regional and national economy, albeit to different extents.

In terms of Limerick and Shannon, the NSS seeks to develop the Gateway as a strategic national and international location, building upon its transport connections (Shannon Airport, Foynes and Limerick Harbours) to enhance the sustainability of the wider region to drive future economic growth. The wider region encompassing the surrounding counties and urban centres, as well as the adjacent Galway and Cork Gateways (and subsequently the wider Atlantic Gateway) has been identified to serve as a national-level economic region with a critical mass comparable to the Dublin area\(^3\). The Regional Planning Guidelines (RPGs) for the Mid-West Region 2010-2022\(^4\) provide the framework for the specific development roles and capabilities of all urban centres in the Limerick-Shannon Gateway (and wider Mid-West Region, which also includes Counties Limerick, Clare and Tipperary). Ennis, as a Hub town, has the role of strengthening the relationship between Limerick and Galway, while facilitating the development of County Clare and South-East Galway.

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The longer term priorities for Limerick-Shannon, as set out in the Gateway Investment Priorities Study, include the upgrading of the road infrastructure between Limerick and both Cork (M/N20 route) and Tralee-Killarney (M/N21 route) and improving collaboration and interaction between the Atlantic Gateways (as a complement to the Dublin-Belfast corridor on the east coast). Setting out a series of goals for Limerick-Shannon Gateway to attain; these were divided into short and longer term objectives, with a three to five year timeframe envisaged for the short term objectives. Although some progress has been made, many objectives were not implemented, monitored or evaluated. There are many reasons for this, not least the economic downturn, cuts to resources, and a lack of coordination and joined up thinking by stakeholders.

Employment potential in the aviation services sector with estimates of over 3,000 jobs being created within five years are projected to result from the proposed merger of Shannon Airport with Shannon Development. The merger planned for 2013 will lead to the formation of the Irish Aviation Services. This merger will bring important changes to the way Shannon Airport is marketed and operated, and will facilitate the Limerick-Shannon Gateway in the attainment of its objectives.

2.2 Spatial Policy Landscape

National Spatial Strategy 2002-2020

The National Spatial Strategy 2002-2020 was created as the principal national strategic planning framework within Ireland. As outlined above, the city of Limerick and the town of Shannon were designated as a Gateway, amongst eight others, each of which is intended to develop as the primary driver of sustainable economic and spatial development within their region. This has identified Limerick-Shannon as a primary driver for development in the Mid-West Region. Limerick and Shannon, and their wider catchment areas have seen extensive growth in terms of their economies, available facilities and infrastructure linkages as well as significant population expansion. This growth was supported by a series of government funded investment initiatives, such as the National Development Plans and Transport 21. Government-funded initiatives such as these have provided important guidance on where specific infrastructure should be prioritised in addition to the required funding mechanisms.

The NSS Update and Outlook Report, published in 2010, acknowledged that despite the attainment of a certain level of success, specifically in the area of infrastructure provision and compliance with the RPGs, a number of issues and challenges to the achievement of the wider NSS objectives remain. The most notable of these relate to settlement patterns and the way in which much of the development which took place in recent years did so in an unsustainable manner, leading to a high level of car dependence and the decline of many urban core areas.

17 Under the guidance and funding initiatives of the original National Development Plan 2000-2006.
One past policy which had a significant spatial dimension was decentralisation. This was a programme to redistribute entire government departments and state agencies with large numbers of civil and public servants from Dublin to various parts of the country. The distribution did not, however, focus exclusively on relocating departments/agencies to the Gateways and Hubs, Ireland’s designated engines for growth. Of those departments/agencies decentralised, 33%\(^\text{18}\) were relocated to the designated Gateways and Hubs, thereby diverting a proportion of development beyond those areas. Furthermore, a large share of future phases of decentralisation were earmarked to move to towns which did not feature in the NSS.

The Department of Environment, Community and Local Government (DoECLG) recently announced their intention to undertake a full review of the NSS to be completed by the end of 2014 or early 2015\(^\text{19}\). The outcome of this review will have an important bearing on the future development of Ireland’s Gateways and Hubs and will have implications which will inform Ireland’s approach to regional policy.

In addition to strategic level policy and investment mechanisms, there have also been regional and locally focused policies and strategies which have sought to enhance the strategic vision of the NSS at a lower level, providing guidance to the relevant authorities on how and where this development should take place. Amongst the most notable of these are the Southern and Eastern Regional Operational Programmes\(^\text{20}\) managed by the Southern and Eastern Regional Assembly (S&E RA), the RPGs for the Mid-West Region, the Atlantic Gateways Initiative (AGI)\(^\text{21}\), and the relevant City and County Development Plans and Local Area Plans. Many of these are statutory in nature, and are subject to review and replacement within statutorily defined periods, and the manner in which they have sought to fulfil the goals of the NSS has also evolved. In this way, resulting policies have been influenced in their development by an extensive series of factors.

**Regional Planning Guidelines**

The Regional Planning Guidelines (RPGs)\(^\text{22}\) are an important element in guiding how the goals of the NSS are achieved. Unlike the NDP, the RPGs have no financial instruments (although they do include a chapter related to regional economic strategies), but instead exert their influence through the establishment of an integrated regional planning framework by ensuring that city and county councils fulfil their obligation that all city and county development plans must be consistent with the goals of the RPGs, and, as such, with the NSS. The RPGs were most recently updated in 2010 and will be subject to a fundamental review in 2016 following the planned reconfiguration of the eight regional authority (NUTS III) regions into 3 Regional Assemblies in 2014.

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\(^{19}\) This announcement was made by Minister for the Environment, Community and Local Government, Phil Hogan T.D, at the Regional Studies Association ‘New Regional Governance in Ireland’ Conference held on 21st January 2013.

\(^{20}\) Funding was provided from various EU funds for the 2000-2006 programme and from the European Regional Development Funds (ERDF) for the 2007-2013 programming period.


Local and Regional Government Reform
This recently unveiled local and regional government reform measure, contained within the reform programme ‘Putting People First: Action Programme for Effective Local Government’23, is intended as a comprehensive mechanism for the reform of local government in Ireland. Many of these authorities are involved in the compilation and implementation of policies and the provision of funds which are designed to give effect to the strategic goals of the NSS. The establishment of three Regional Assemblies, as well as the amalgamation of a number of local authorities, as set out in ‘Putting People First’, will have an important impact in relation to the delivery of services and funding and the creation of policies in support of individual Gateways.

The three new Assemblies will be as follows:

» Southern Region Assembly which will evolve from the existing Southern and Eastern Regional Assembly (consisting of Munster and the south-east counties of Carlow, Kilkenny and Wexford);
» an Eastern and Midland Region Assembly which will be newly established (consisting of the province of Leinster other than the south-east counties in the Southern Region); and
» a Connacht-Ulster Region Assembly which will evolve from the existing Border, Midland and Western Regional Assembly (consisting of the province of Connaught and the counties along the Border with Northern Ireland other than County Louth).

These will assume all of the responsibilities previously held by the eight regional authorities; within the context of the NSS, this means that these Assemblies will now be responsible for the delivery and administration of regional and economic strategies, including the continued management of EU Regional Operational Programmes, all of which will be influential in the future development of the designated Gateways and Hubs, as well as the continuing implementation of the RPGs, which will run until 2016 pending their replacement by the new regional strategies mentioned above, the preparation of which will commence in 2015.

The Importance of the Regional Development Dimension
The strengthening of regional government is essential to ensure that regional imbalances are addressed, and to manage the regional impact of national policies and programmes. A regional approach to enhancing competitiveness, and addressing the various strengths and weaknesses of individual regions, necessitates appropriate regional structures being in place. One example of the importance of an effective and efficient approach to regional development is seen in the recently published National Strategy for Higher Education, which also advocates regional clustering, wherein collaboration is fostered “between clusters of geographically proximate institutions, to ensure that individual, enterprise and societal needs are addressed in a planned, coherent and efficient way”. The report states that the clustering model proposed complements the NSS and will benefit from ongoing improvements in regional government structures24.

The Atlantic Gateways Initiative was launched with the intention of increasing the interconnectivity of the four Gateway cities which are located along the Western and Southern (Atlantic) coasts of the country (Galway, Limerick, Cork and Waterford along with the Hub towns). It was intended that this approach would allow these Gateways to operate as an effective regional counterbalance to the development pressure of the Greater Dublin Area (GDA), thus achieving one of the key objectives of the NSS. Central to the success of this initiative was the investment in prioritised infrastructure links, especially in the area of transport and broadband, all of which would serve to nurture and encourage economic growth individually and collectively. While some improvement in transportation linkages between the four cities which comprise the Atlantic Gateways have taken place, there are still significant bottlenecks (while it is possible to travel to Dublin non-stop from each one of them via motorway, it is not possible to travel between them without having to travel through a number of highly congested towns and villages) which are continuing to have a negative influence on the success of this initiative. While the Atlantic Gateways Initiative remains a strategic objective under the National Spatial Strategy, the reality is that the economic downturn and resultant scarcity of public investment has delayed progress on enabling investment, particularly improved transport connectivity.

The Mid-West Regional Authority has recently completed the formulation of the Mid West Area Strategic Plan 2012-2032 (MWASP), which is intended to operate as a facilitator of regional growth and development, alongside the RPGs and the relevant City and County Development Plans over a twenty year horizon. This strategy, in conjunction with the aforementioned development plans, serves to establish the overall framework for the proper planning and sustainable development for both the Gateway and the Hub until 2016, as well as the wider Mid-West Region. Another important strategy which will be influential on the future development of the Gateway will be the Shannon Integrated Framework Plan 2013-2030. The Shannon Estuary is a vital element within the economy of the Limerick-Shannon Gateway, and this strategy will be instrumental in promoting the future development of the Estuary and its environs.

**Planning Legislation**

In terms of spatial planning legislative changes, the Planning and Development (Amendment) Act 2010\(^25\), enhances the objective of supporting economic renewal and sustainable development and strengthens the requirement for greater alignment between the NSS and RPGs and city/county development plans and Local Area Plans. In addition, the requirement by city and county councils to prepare a Core Strategy grounded in an evidence-based assessment will augment development plans, while ongoing reforms to specific aspects of legislation such as the construct of ‘Part V’ (which relates to social and affordable housing) will ensure that the statutory context is relevant and fit-for-purpose.

**Resourcing Mechanisms for Spatial Policy**

Prior to 2008, there was little by way of dedicated resourcing mechanisms (although Gateways were prioritised in Government capital funding programmes) in place to drive the implementation of national spatial policy. Furthermore, there has been an evident slowdown in the implementation of national economic policy in recent years owing to the scale of the prevailing economic conditions faced. One important objective in resourcing Gateway development is the compatibility and alignment

of various programmes. For example, the Human Capital Investment Operational Programme 2007-2013 (supported by the European Social Fund) specifically seeks to align with the NSS, stating it "...will respect the work to be undertaken in implementing the NSS and through financing of projects in each of the regions will seek to contribute where possible to the aims of the NSS". The resourcing of Gateway development is explored further in the next section.

2.3 Resourcing Gateway Development

The economic circumstances which the country has experienced since 2008 have impacted upon all policy decisions, and especially those relating to the allocation of funding and investment, such as those required in pursuit of the goals of the NSS. Since this time, there has been a series of funding cuts and new economic policies, each of which has sought to gain greater control over public expenditure. In some cases there has been a direct impact upon the implementation (such as in the case of deferrals of infrastructure investment programmes) of the NSS, while in other cases, the impact has been indirect such as reduced funding for health services which will have longer term implications for the health of populations. The cumulative effect led to delays in the realisation of NSS objectives within individual Gateways and Hubs.

The slower delivery of the strategic goals originally envisaged within each Gateway, Hub and for the NSS overall is predominantly arising from the national funding restrictions and new government policies introduced in the last number of years. The reduction in revenues which many local authorities have experienced due to the collapse in development contributions and a reduced rates base have served to further undermine the development of individual Gateways and Hubs already experiencing funding cuts from national funds.

Two National Development Plans (NDPs, those of 2000-2006 and 2007-2013) have been in operation since the adoption of the NSS in 2002. The current NDP 2007-2013, which is, in effect, no longer in operation (and has been taken over by capital investment strategies, etc), has been much hampered by the effects of the economic downturn in recent years.

The deferral of the Gateway Innovation Fund (GIF) in 2008 has removed a vital funding mechanism specifically intended to enable the delivery of necessary flagship infrastructure and to aid in the realisation of goals and objectives within the individual Gateways. An initial Exchequer provision of €300 million over three years 2008-2010, was envisaged for the GIF. Separately the two Regional Assemblies introduced grant schemes to utilise the European Regional Development Fund (ERDF) advances to the Regional Operational Programmes 2007-2013 to fund a number of Gateways and Hubs projects. These schemes funded Gateways and Hubs projects in the BMW region providing over €17 million in grant aid and Gateway projects in the S&E region with over €11 million in grant aid. The combined investment under both schemes across the two regions is €50.5 million.

This decline in development and infrastructure funding has impacted upon the realisation of the goals of the Limerick-Shannon Gateway in a number of ways, with the most notable of these concerning the ongoing regeneration projects within socially

27 Details are available at: http://www.irishspatialstrategy.ie/
disadvantaged areas of Limerick. As a city, Limerick has experienced problematic social issues which have presented themselves within a small number of areas in the city. An ongoing urban regeneration project originally conceived in 2007 has experienced some delays in its implementation. While currently the responsibility of Limerick City Council work is still ongoing albeit at a slower pace. Important improvements to the road linkages between Limerick and Cork and Limerick and Waterford have also been suspended due to the economic downturn.

Gateway Investment
Focused policies and strategies are in place to enhance the strategic vision of the NSS at the regional and local level (as discussed earlier), providing guidance to the relevant authorities on how and where this development should take place. Amongst the most notable of these are the Southern and Eastern Regional Operational Programmes managed by the Southern and Eastern Regional Assembly (S&E RA), the RPGs and the relevant City and County Development Plans and Local Area Plans. Many of these are statutory in nature, and are subject to review and replacement within statutorily defined periods, the manner in which they have sought to fulfil the goals of the NSS has also evolved. In this way, resulting policies have been influenced in their development by an extensive series of factors.

The European Regional Development Fund (ERDF) co-funded Gateway Grant Scheme funding mechanism managed by the Southern and Eastern Regional Assembly, is designed to assist and support economic, social and environmental enhancements within the Gateways, with a specific emphasis on regeneration, infrastructure, cultural, and sustainable energy projects. Amongst the recent projects within the Limerick-Shannon Gateway which have taken advantage of these funds is the ‘Crossroads’ public transport hub, along with a series of associated public realm enhancements within Limerick city centre, which received grant aid of €3 million.

The Transport 21 programme, which ran between 2005 and 2010, has resulted in significant improvements in terms of infrastructural connectivity throughout the island of Ireland. These infrastructural improvements have led to a much more efficient transport system, especially between Dublin and the other designated Gateways and Hubs, as well as within the Gateways and Hubs themselves. Certainly, investment in the inter-urban motorway network has resulted in radial links from Dublin to most of the Gateways, with the exception of Letterkenny/Sligo. It has been highlighted across many platforms how the Cork-Limerick road connection is currently the worst inter-gateway road connection in the country. Improvements in the road linkages between Limerick and Cork in particular and Limerick and Waterford would impact positively on the region’s economy and contribute to enhanced connectivity between proximate Gateways, however, these routes have not yet been upgraded.

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28 Limerick Regeneration Website: [http://www.limerickregeneration.ie/](http://www.limerickregeneration.ie/)
29 For details see: [http://www.limerickregeneration.ie/](http://www.limerickregeneration.ie/)
30 Details of the M20 Cork to Limerick Road scheme available at: [http://www.nra.ie/RoadSchemeActivity/CorkCountyCouncil/M20CorktoLimerickNorthernSection/SchemeName.16492.en.html](http://www.nra.ie/RoadSchemeActivity/CorkCountyCouncil/M20CorktoLimerickNorthernSection/SchemeName.16492.en.html)
31 Funding was provided from various EU funds for the 2000-2006 programme and from the European Regional Development Funds (ERDF) for the 2007-2013 programming period.
2.4 Emerging Policy Landscape

In response to the economic downturn, various recovery initiatives and strategies have been developed, and subsequently superseded. In many cases these policies have not incorporated an overtly regional dimension, notwithstanding the fact that the NSS Update and Outlook report identified that successful regional development depends upon effective interaction of policies and funding strategies from a wide range of government departments, local and regional authorities, and private sector investment.

The recession has brought with it a vast increase in unemployment levels. Economic recovery was predicated upon a reversal of this trend, and an emphasis on sustainable economic growth has become a government priority. Upon its publication in 2010, the primary focus of the National Recovery Plan 2011-2014\(^\text{35}\) was to promote nationwide economic recovery. The plan sets out a series of reforms of both a fiscal and structural nature, designed to make the country more competitive and attractive, and in doing so, develop new markets for existing and developing Irish goods. It seeks to attract additional Foreign Direct Investment (FDI) (the Industrial Development Authority strongly advocates a regional spread of FDI in Ireland), and make Ireland an attractive place in which to do business. It must be noted that in 2012 there has been a significant growth in FDI beyond the Dublin region, with notable FDI jobs gains in the Dundalk, Sligo, Galway and Limerick areas. Amongst the recent headline reports for foreign direct investment into the Limerick-Shannon Gateway include the September announcement that Northern Trust is to expand its Limerick operation by creating up to 400 new jobs over the next five years, while another company, Vistakon, made an announcement in January 2013 of their plans to invest €100 million in the expansion of its manufacturing operations. The investment will see the creation of 100 new highly skilled jobs.

**National Recovery Policy and Investment Framework**

As one of the implementation vehicles of the National Recovery Plan, the Capital Investment Framework 2012-2016\(^\text{36}\) was designed to assess the existing and future capacity requirements of the Country’s infrastructure, in order to ensure that it is capable of facilitating the essential economic growth required to bring the country out of recession. Where an infrastructure deficit or funding requirement is identified, the policy states that capital will be made available to address this. The primary motivation for this policy is to ensure that, in spite of the limited quantity of funding available, necessary infrastructure developments and financial support for fledgling businesses will be prioritised.

The National Action Plan for Jobs published in 2013 seeks to reinforce the Government’s role as an employment facilitator rather than as a jobs provider. To this end, the Plan identifies seven principal areas on which job creation activities will be focused. The objective of these activities is primarily about enhancing the ability of Irish business to compete both nationally and internationally, encouraging entrepreneurship, identifying new markets, and developing new or as yet under developed sectors, while also looking to attract new FDI and incentivise the expansion of existing operations, with a specific emphasis on the research sector.

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The National Action Plan for Jobs acknowledges the requirement for a regional focus, and sets out individual objectives which encompass a regional dimension; it also assures government will commit “…to ensuring that job creation measures are targeted in a balanced way across all regions. The IDA is committed to delivering 50% of investments to areas outside Dublin and Cork”37. While the National Action Plan for Jobs makes no direct reference to the NSS being a more specific set of actions than a broad policy document, the publication of quarterly progress reports outline the level of delivery of measures targeted for each quarter, with some measures having a regional focus.

2.5 The Importance of the Gateways and Hubs Development Index to Inform Policy

The continued pursuance of balanced regional development and the development of designated areas to drive regional growth (such as Gateways and Hubs) should be seen as an integral part of the economic recovery of the country. One of the key lessons which should be learned regarding the period leading up to the economic downturn is in the area of the decision making process; poor decisions lead to poor outcomes. In many cases, the absence of comprehensive evidence to inform policy makers undermined the quality of decision making processes. Policy decisions informed by accurate and reliable information will help to avoid the type of poor decisions which have proved so damaging in our recent past, and will result in more sustainable settlement patterns, economic and regional development.

The Gateways and Hubs Development Index (GHDI) study represents the opportunity to use a comprehensive and accurate evidence base to provide a solid foundation on which to make decisions on the development of those Gateways and Hubs which are meant to form the key drivers of Ireland’s economic development. The manner in which it has been designed and compiled allows for it to be scalable from the individual Gateway and Hub level to regional and national levels, as well as being intended for ongoing update and renewal. In this way, it can be used to assist in the formulation and implementation of successor regional development policies.

At the level of individual Gateways and Hubs, the exploitation of an evidence-based approach to policy formulation, especially in the formulation of core strategies, can help in the identification of potential barriers and most effective means to address these challenges. The GHDI provides an insight to inform regionally specific development agendas and facilitate the identification of core strengths or weaknesses. A detailed assessment of the progress of the Limerick-Shannon Gateway, as well as all of the other Gateways and Hubs, is useful to determine relevant trends and performance measured across a set of socio-economic indicators. In this way, The GHDI is an important and effective tool for evaluation of the development of Gateways and Hubs in both regions.

The analysis of the Gateway is undertaken using a series of eight domains and constituent indicators, respecting where possible those originally adopted in the Gateway Development Index (GDI) 2009. The Gateways and Hubs Development Index (GHDI) 2012 does reflect some minor changes in the suite of indicators used compared to the 2009 Index. While a small number of data sources were no longer collected additional indicators have been identified at relevant spatial levels which serve to further improve the evolution of the Index. The domains and indicators consist of:

1. Population
   - Population Growth
   - Age Vibrancy of Population

2. Enterprise & Employment
   - New Firm Formation
   - Sectoral Base & Provision of Services
   - Unemployment Rate

3. Knowledge & Innovation
   - Labour Force Quality
   - Third Level R&D

4. Natural & Physical Environment
   - River Water Quality
   - Consumable Water Infrastructure
   - Waste Recovery

5. Transport & Connectivity
   - Green Transport Usage
   - Travel-To-Work Times
   - Public Transport Availability
   - Retail Activity
   - IT Connectivity

6. Health & Wellness
   - Mortality
   - Birth Weight
   - Primary Health Care

7. Crime

8. Affluence & Deprivation
   - Affluence & Deprivation

Interpreting the Analysis

- The Gateways and Hubs Development Index 2012 – this refers to the compilation of a dataset based on data available across all domains to year end 2012, set against two geographical zones established using Census 2011 settlement and labour market flow data.
- The Gateways Development Index 2009 – in order to facilitate comparison between the GHDI 2012 and the GDI 2009, the 2009 Index has been remapped across the 2011 Census boundaries to produce a comparative Index.
- Gateway Score (Zone 1 and Zone 2) is calculated based on total figures for the combined gateway. Gateway scores may differ from strict averages based on the population, size and composition of individual zone characteristics.
- Comparison of Index Scores Over Time: Care should be taken to note that in the comparison of the Index scores, as presented within the summary assessment section of each domain assessment, these scores have been calculated against the Gateway average for the respective year. As a result the average score will change between years. Consequently, improvements over time (in raw numbers), may not actually match the pace of improvement for other Gateways.
3.2.1 Population Growth

Indicator Description: Actual change in the number of persons resident within the defined area. This figure consists of the population of the CSO-defined (2011) urban cores of the Gateway (Zone 1), and the surrounding area where more than 20% of the resident population in employment commute to the Gateway (Zone 1) for the purposes of work (derived from CSO POWSCAR, 2011) (Zone 2). As a regional growth centre, a Gateway’s population should typically grow at a pace in excess of the national growth rate (8.24% between 2002 and 2006, and 8.22% between 2006 and 2011).

The population of the Limerick-Shannon Gateway, according to CSO data produced by the 2011 Census was 222,604. This population figure has increased 5.85% on that produced by the 2006 Census and 13.52% from that produced in 2002; the rate of population change between 2002 to 2006 and 2006 to 2011 decreased by 1.41%. Population increases within Zone 2 account for the majority of the growth between 2002 and 2006, with population increases of just 4.63% occurring within Zone 1 in comparison to 9.75% within Zone 2. The figures for the period 2006 to 2011 show that the pace of population growth within Zone 1 had declined further to just 1.15%, while within Zone 2 it had increased to 18.87%. Comparison of these growth rates indicates a definite mismatch between where new development is needed and where it is taking place, with development within Zone 1 almost non-existent compared to what is occurring within Zone 2. By comparison, the average growth rates for all Gateways were 5.90% for Zone 1, 12.06% for Zone 2, and 8.44% for the Gateways as a whole.

<table>
<thead>
<tr>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Zone 1</strong></td>
<td>(95,559 - 99,979)</td>
<td>(99,979 - 103,127)</td>
</tr>
<tr>
<td>Population Growth</td>
<td>4.63%</td>
<td>1.15%</td>
</tr>
<tr>
<td>Population Change Difference (%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Zone 2</strong></td>
<td>(100,329 - 110,331)</td>
<td>(110,331 - 131,150)</td>
</tr>
<tr>
<td>Population Growth</td>
<td>9.75%</td>
<td>18.87%</td>
</tr>
<tr>
<td>Population Change Difference (%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Zone 1 &amp; 2</strong></td>
<td>(196,888 - 210,310)</td>
<td>(210,310 - 222,604)</td>
</tr>
<tr>
<td>Population Growth</td>
<td>7.25%</td>
<td>5.85%</td>
</tr>
<tr>
<td>Population Change Difference (%)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

38 The population share figure was not used in the final compilation in the 2009 GDI report, and was not carried out within this report.
39 This figure consists of the populations of Limerick City and the town of Shannon and all surrounding areas where more than 20% of the resident population in employment commute to the Gateway for the purposes of work (derived from CSO POWSCAR, 2011).
Population Growth 2006-2011

Key
Population Change '06-'11
-12% - 0%
0% - 10%
10% - 25%
25% - 50%
> 50%

Settlements > 1500

Age Dependency Change 2006-2011

Key
Change in Age Dependency, '06-'11
-20% - 0%
0% - 5%
5% - 10%
10% - 20%
> 20%

Settlements > 1500
Indicator Description: The number of those within the age cohorts of children 14 years or under and adults 65 years and older, as a proportion of the total working population. As regional growth leaders, Gateways should experience and attract inward migration of those of working age. Therefore increases in the core working age cohorts (here defined as the 15-64 age cohorts) will occur in successful Gateways and can be identified by measuring changes in relative age dependency rates.

Analysis of the dependency ratio for the Limerick-Shannon Gateway in 2011 reveals that 42.89% of the population living within the urban area (Zone 1) are classified as being dependent; this compares with 40.20% in 2002 and 38.63% in 2006. There have been significant changes to the dependency rate within Zone 2, initially decreasing from 49.37% in 2002 to 45.00% in 2006 and increasing again to 52.91% in 2011. There is a clear trend within both Zones of increases in their dependency rates, and this has contributed to the current dependency rate within the Gateway for 2011 of 48.19%, while the adult and youth dependency rates are 16.31% and 31.88% respectively (both of which are below the average for all Gateways of 17.03% and 32.50% respectively). By comparison, the average dependency rate for all Gateways in 2011 was 49.53%.

<table>
<thead>
<tr>
<th>Zone</th>
<th>Year</th>
<th>YDR**</th>
<th>ADR***</th>
<th>Change in Dependency Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zone 1</td>
<td>2006</td>
<td>38.63%</td>
<td>+25.43%</td>
<td>+13.20%</td>
</tr>
<tr>
<td></td>
<td>2011</td>
<td>42.89%</td>
<td>YDR + 27.30% ADR + 15.59%</td>
<td></td>
</tr>
<tr>
<td>Zone 2</td>
<td>2006</td>
<td>45.00%</td>
<td>-29.88%</td>
<td>-15.15%</td>
</tr>
<tr>
<td></td>
<td>2011</td>
<td>52.91%</td>
<td>YDR - 35.95% ADR - 16.95%</td>
<td></td>
</tr>
<tr>
<td>Zones 1 &amp; 2</td>
<td>2006</td>
<td>43.86%</td>
<td>-29.46%</td>
<td>-14.38%</td>
</tr>
<tr>
<td></td>
<td>2011</td>
<td>48.19%</td>
<td>YDR - 31.88% ADR - 16.31%</td>
<td></td>
</tr>
</tbody>
</table>

1. Dependency Ratio = the proportion of those under 15 years or over 64 years as a proportion of the total population from 15 to 64 years.
2. YDR = Youth Dependency Ratio
3. ADR = Adult Dependency Ratio

40 The age dependency rate variable for the age vibrancy indicator is derived from CSO Census data. It should be noted that, in reality, there is likely to be substantial numbers of people aged 15 years and over that remain in full time education as well as a significant proportion of those who are aged over 65 and still form part of the work force.
41 This in effect means that for every 100 people within the Gateway, there are 52 within the productive age group cohorts and 48 who are in the dependent age group cohorts; these figures do not take into account those who are unemployed, disabled or incapable of work for some other reason.
3.2.3 Assessment

» Under the Population domain the Limerick-Shannon Gateway’s composite Index score was 4.4 in the 2012 GHDI compared to 5.0 in the 2009 GDI, this reflects a decrease of 0.6.

» Under the Population domain the Limerick-Shannon Gateway’s Zone 1 Index score was 4.6 in the 2012 GHDI compared to 5.1 in the 2009 GDI, and this reflects a decrease of 0.5.

» Under the Population domain the Limerick-Shannon Gateway’s Zone 2 composite Index score was 6.2 in the 2012 GHDI compared to 5.3 in the 2009 GDI, this reflects an increase of 0.9.

The population of the Limerick-Shannon Gateway has continued to rise in the period 2006-2011. However, most of this growth has taken place within Zone 2, outside of the urban core. The Mid-West Regional Planning Guidelines 2010 - 2022 set out a growth rate for the urban centres of the Limerick-Shannon Gateway of 4.62% between 2006 and 2010. In contrast, within the GHDI study, Zone 1 produced a growth figure of 1.15%. It is important to note that these figures are not directly comparable due to boundary differences, but it is possible to see that the urban cores are not performing to their potential in terms of population growth.

The faster growth rate in the population of Zone 2 in comparison to Zone 1 was identified in the 2009 GDI study, and remains contrary to basic settlement strategy principles set out in the national, regional and local planning policy. Although the Zone 1 area did demonstrate nominal growth between 2006 and 2011, a number of Electoral Divisions (ED’s) within this Zone appear to have experienced significant population decline, especially in the areas associated with the ongoing Limerick Regeneration Project. Within the Northside Regeneration area, the ED’s of Ballynanty (Moyross) and St. Johns (St. Mary’s Park) illustrated declines of 15.86% and 28.74% respectively, while within the Southside Regeneration area the populations of Prospect B (Ballinacurra Weston) and Galvone B (Southill) declined by 26.81% and 44.22% respectively. Although much of this population decline is inextricably linked to the ongoing regeneration works and redevelopment activities, it is unknown exactly what proportion of the original populations of these areas will seek to return to them as the redevelopment project continues.

42 Comparison of Index Scores Over Time: Care should be taken to note that in the comparison of the Index scores, as presented within the summary assessment of each domain assessment section, these scores have been calculated against the Gateway average for the respective year. As a result, the average score will change between years. Consequently, improvements over time (in raw numbers), may not actually match the pace of improvement for other Gateways.


44 Large amounts of housing within the regeneration areas are to be demolished to make way for the redevelopment, with the first demolitions taking place during 2009. Details available at: http://www.limerickregeneration.ie/2009/05/27/demolition-of-first-house-in-st-marys-park/
The population of the city centre has been falling in recent years for a variety of reasons. The availability of lands and services for housing, commercial and employment related development on greenfield sites at the edge of the city and in the rural villages and towns in the city’s wider hinterland may be one of the reasons for the above but it is not the only one. The Government is focused on supporting and investing in urban regeneration initiatives in Limerick and has made key decisions on the integration of local authority structures now well advanced. Taking account of the above, it will be critically important that within the new development plans prepared by the newly unified local authority for Limerick, an appropriate rebalancing of planning policies for future employment creation and housing provision in favour of the city core is achieved if the Limerick-Shannon Gateway is to turn itself around and in the process of doing so, meet relevant targets in the RPGs, and by extension the objectives of the NSS.

Despite an increase in the dependency ratio for the Limerick-Shannon Gateway between 2002 and 2011, the proportion of dependents remained below the average dependency rate for all Gateways. This indicates that there was a higher proportion of people from the core working age cohorts living within the Gateway in 2011. This in turn is indicative of an elevated rate of inward migration of workers. It should also be noted that the youth dependency rate is also below the average for all Gateways, which is an indication that there are fewer families, and therefore fewer children living within the Limerick-Shannon Gateway. The migration of people of working age to the Gateway can be seen as a positive signal of the attractiveness of Limerick-Shannon and its potential as a Gateway.
3.3 Enterprise and Employment

3.3.1 New Firm Formation

Indicator Description: The number of Value Added Tax (VAT) registrations by new firms per 1,000 of the labour force. Gateways that are developing successfully should experience faster growth rates in new firm formations than the national average.

The level of new firm formation which is evident for 2011 within the Limerick-Shannon Gateway shows that there were 8.28 new firms established for every 1,000 employees within the Gateway, which is well above the average new firm formation across all Gateways of 7.29. This latest figure shows an increase of 0.28 firms per 1,000 employees in comparison to the figures for 2006 (8.00). The difference in the rate of new firm formation between Zones 1 (8.38) and 2 (8.86), was 0.48 new firms per 1,000 employees in 2011. The rate of new firm formation was slightly higher within Zone 2 in comparison with Zone 1. The Limerick-Shannon Gateway appears to be one of the few Gateways which have demonstrated an increase in the number of new firms established in 2011 in comparison to 2006, as well as being one of the few where there are more new firms within Zone 2 than there are in Zone 1.

<table>
<thead>
<tr>
<th></th>
<th>2006</th>
<th>Zone 1</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Firm Formation</td>
<td>7.97</td>
<td>8.38</td>
<td></td>
</tr>
<tr>
<td>Change in New Firm Formation</td>
<td>+ 0.41</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2006</th>
<th>Zone 2</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Firm Formation</td>
<td>8.04</td>
<td>8.86</td>
<td></td>
</tr>
<tr>
<td>Change in New Firm Formation</td>
<td>+ 0.82</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>2006</th>
<th>Zone 1 &amp; 2</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Firm Formation</td>
<td>8.00</td>
<td>8.28</td>
<td></td>
</tr>
<tr>
<td>Change in New Firm Formation</td>
<td>+ 0.28</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* New Firm Formation is taken as VAT registration per 1,000 labour force.

3.3.2 Sectoral Base and Provision of Services

Indicator Description: Analysis of the sectoral base, as an indicator of economic activity is informed by the quantity of services within all enterprises of the Gateway, and gives a valuable insight into the economic development of the Gateway. Results are presented as a percentage of all services within the national economy which occur in this Gateway (the share of services in the economy), and compared with the percentage of the national population which is present within the Gateway.

The quality of the sectoral base is calculated based on the share of services in the total number of companies using the NACE coding (an EU statistical classification) of businesses in the GeoDirectory 2012 (database of all Irish buildings and addresses).

45 It is important to note that this indicator does not account for the scale of operation of the new business entity. It includes all new VAT registrations of newly formed firms regardless of the size, type or character of the new firm.
There were 119,012 services recorded nationally in 2012. The Limerick-Shannon Gateway supported 4.99% (5,944 services) of these services with 4.85% of the national population. Analysis by Zone indicates that Zone 1 supports 2.74% of services (3,257 services) with 2.20% of the national population, while Zone 2 supports 2.26% of services (2,687 services) with 2.86% of the national population. By comparison, the average percentage of services present in all Gateways was 3.68% for Zone 1, 2.18% for Zone 2 and 5.87% for the Gateway as a whole.

<table>
<thead>
<tr>
<th></th>
<th>Zone 1</th>
<th>Zone 2</th>
<th>Zone 1 &amp; 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>0.41%</td>
<td>0.82%</td>
<td>0.26%</td>
</tr>
</tbody>
</table>

*Percentage of all services within the national economy which occur in this Gateway (the share of services in the economy), and compared with the percentage of the national population which is present within the Gateway.

### 3.3.3 Unemployment Rate

Indicator Description: This indicator relates to the number of persons defined as 'unemployed' within the Census 2006 and Census 2011 results. Successfully performing/developing Gateways should experience a lower unemployment rate than the national average (in 2006 Ireland’s national unemployment rate stood at 4.3%, increasing to nearly 19% in 2011).

Unemployment within the Limerick-Shannon Gateway can be seen to have increased in the period from 2006 to 2011. In 2006, unemployment within the Gateway stood at 9.09% in Zone 1 and at 5.21% in Zone 2; the comparable rates for 2011 stood at 23.39% for Zone 1 and 16.68% for Zone 2. These figures illustrate a 14.10% and 11.29% increase respectively across the zones. The Limerick-Shannon Gateway experienced an increase of unemployment of 12.63% over this period, returning a figure of 19.69% in 2011. By comparison, the average unemployment figure for all Gateways in 2011 stood at 19.94%.

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46 This includes all service providers as listed within the GeoDirectory, regardless of size, type or character of the individual service; it encompasses the following broad categories: Construction, Hotel and Services, Transportation, Storage and Communication, Financial Intermediation, Real Estate Activities, Public Administration, Education, Health and Social Work, and Other Community, Social and Personal Activities. These categories are further subdivided allowing for the accurate characterisation of the service provider for the purposes of allocating a NACE Code.

47 This indicator uses Census derived data instead of the more widely used Live Register data. For the scale of this study (assessing small areas), it was judged that the Live Register figures were not spatially disaggregated enough to capture unemployment rates at a small scale. The principal reasoning for this is that no spatial boundaries have been defined for each Social Area Office. The unemployment figures produced here are derived from analysis of Census data at Electoral Division level. The CSO defines unemployed people as 'Persons who, in the week before the survey, were without work and available for work within the next two weeks, and had taken specific steps, in the preceding four weeks, to find work' (Central Statistics Office, 2012, This is Ireland: Highlights from Census 2011, Part 2. Appendix 3. P. 117. Available at: http://www.cso.ie/en/media/csoie/census/documents/thisisirelandpart2census2011/This%20is%20Ireland%20Highlights.%20P2%20Full%20doc.pdf.

48 The chief difference resulting from this is that the Census records an unemployment rate (based on Principal Economic Status) of 19.0 per cent, compared with the official rate (based on International Labour Office criteria) of 14.3 per cent, as per the Quarterly National Household Survey. Accordingly, the results may appear higher than those typically reported.
Under the Enterprise and Employment domain the Limerick-Shannon Gateway’s composite Index score was 5.3 in the 2012 GHDI compared to 4.4 in the 2009 GDI, this reflects an increase of 0.9.

Under the Enterprise and Employment domain the Limerick-Shannon Gateway’s Zone 1 Index score was 5.1 in the 2012 GHDI compared to 4.3 in the 2009 GDI, this reflects an increase of 0.8.

Under the Enterprise and Employment domain the Limerick-Shannon Gateway’s Zone 2 Index score was 5.5 in the 2012 GHDI compared to 4.5 in the 2009 GDI, this reflects an increase of 1.0.

The Limerick-Shannon Gateway has managed to avoid the trend which is evident for the majority of the Gateways in terms of new firm formations; being one of the few Gateways to produce positive growth in this area since 2006 (a greater number of new firms were established in 2011 than in 2006). Zone 2 was the location for most of these new firms, although Zone 1 was not far behind and this may be explained in part by the high population growth that continues to occur in Zone 2. The Gateway also boasts a healthy proportion of service provision within a national context. Although the rate of unemployment has increased since 2006, it remains lower than the national Gateway average. The creation of employment, or at the very least the creation of the conditions which facilitate employment, must be seen as a priority for the Gateway. As the urban core, Zone 1 should be performing better than Zone 2. However, at present, from the point of view of new firm foundation and share of services in the economy, there appears to be little difference separating the performance of the two zones. Given that the population of Zone 2 is outperforming Zone 1, there is cause for a review of effectiveness and practical implementation of initiatives to strengthen the urban core.
3.4 Knowledge and Innovation

3.4.1 Labour Force Quality

Indicator Description: This indicator observes the proportion of the Gateway’s labour force (within the 15 to 64 age cohorts) with a third level education, thereby demonstrating the Gateway’s labour force capacity. A skilled and educated workforce is an important element for a successful Gateway, and an essential factor in attracting inward investment.

The percentage of the labour force within the Limerick-Shannon Gateway (Zones 1 and 2) who hold a third level qualification has demonstrated overall growth of 7.14%, from 24.09% in 2006 to 31.23% in 2011. The bulk of this most recent growth can be attributed to Zone 2, which demonstrated an 8.07% increase (to 33.03%) over the period of 2006 to 2011. An analysis of the figures for Zone 1 illustrates that the pace of growth is much slower (4.62%) over the same period, from 22.10% in 2006 to 26.72% in 2011. By comparison, the average proportion of third level qualifications within the labour force of all Gateways was 31.07% in 2011.

The Graduate Retention Rate was included in the 2009 GDI, but the statistical data required for this indicator is no longer available from the Higher Education Authority (HEA).

The 2009 GDI used this indicator with a different composition. The ‘Labour Force Quality’ indicator used in the 2009 GDI observed the proportion of the adult population (15+ years) with a third level education. The current study refines this further to focus on the labour force cohorts (15-64) with a third level education.
3.4.2 Third Level Research and Development

Indicator Description: This indicator quantifies the amount of research and development (R&D) financial support generated by third level institutions by Gateways; it is expressed relative to the number of third level admissions within the Gateway. Successful Gateways will be drivers of innovation, knowledge creation and technology transfer and therefore should feature higher levels of funding for research and development projects.

The importance of knowledge and innovation within the Limerick-Shannon Gateway, as represented by the increasing percentage of the labour force who hold third level qualifications, is further reinforced by the substantial and sustained amount of funding invested into research and development since 2002. Over this period, funding for research and development projects per third level admission increased from €3,264 in 2006 to €3,323 in 2008. The relative stability of these funding allocations over this period, as well as the scale of investment per student is an excellent indication of the health of research and development activities within the Gateway. This trend of growth in third level research and development funding has continued, despite the effects of the recession. Analysis of the figures produced for 2010 indicates that the amount of funding invested in third level institutions research and development activities increased to €3,550 per enrolled student, an increase of €227 per enrolled student since 2008, and of €286 since 2006. By comparison, the average amount of funding per enrolled student for all Gateways in 2010 was €2,405.

31 This indicator consists of the merging of two indicators which featured in the 2009 GDI. 'Graduate Admissions', the number of third-level admissions as recorded by the Higher Education Authority (HEA), and 'Third-Level R&D', the R&D earnings achieved as recorded by the Higher Education Authority, have been brought together to form a single indicator.
3.4.3 Assessment

» Under the Knowledge and Innovation domain the Limerick-Shannon Gateway’s **composite** Index score was 5.3 in the 2012 GHDI compared to 5.3 in the 2009 GDI, this reflects no change.

» Under the Knowledge and Innovation domain the Limerick-Shannon Gateway’s **Zone 1** Index score was 5.0 in the 2012 GHDI compared to 5.0 in the 2009 GDI, this reflects no change.

» Under the Knowledge and Innovation domain the Limerick-Shannon Gateway’s **Zone 2** Index score was 5.7 in the 2012 GHDI compared to 5.7 in the 2009 GDI, this reflects no change.

The proportion of labour force who hold a third level qualification has increased since 2006, with the majority of this increase being attributable to the Zone 2 labour force. However, despite the overall increase, the figures remain lower than the average for all Gateways. Funding for third level research and development has increased since 2006, as did the number of student admissions, from 16,344 in 2006 to 18,590 in 2010, increasing further to 19,067 in 2011\(^2\), with these students registered in University of Limerick, Limerick Institute of Technology and Mary Immaculate College, Limerick. Crucially, Limerick-Shannon was one of only three Gateways which demonstrated a trend of continuous growth in research and development funding over the period 2006 to 2010. Opportunities exist to forge stronger linkages between third level institutes and business providers in the area, which would help to generate local jobs, improve graduate retention rates and in turn promote participation at third level institutes in the region.

\(^{52}\) Data relating to third level research and development funding is available for 2010 only; 2011 data is available for third level admissions at this stage, although for cross-comparison with the funding data, 2010 third level admissions rates have been utilised.
3.5 Natural and Physical Environment

3.5.1 River Water Quality

Indicator Description: This indicator measures the average biological river water quality. River water quality is one method which can be used to measure the level of pollution which may be present within each Gateway environment. Assessments of river water quality based on biological water quality criteria are primarily undertaken at a national level by the Environmental Protection Agency.

An examination of the water quality of rivers associated with Limerick-Shannon Gateway (including other settlements within the Gateway) has found it to be of good quality overall. Expressed on a scale of one to five, with one indicating seriously polluted water and five indicating unpolluted water, the combined Zones 1 and 2 achieved four out of five in 2011. Analysis of the individual Zones reveals that the rivers within Zone 1 achieved a score of three out of five, indicating that they are moderately polluted, while the rivers of Zone 2 achieved an aggregated score of four out of five. The figures produced for 2006 indicate that the river water was of a very good quality across the Gateway at this time, achieving four out of five across both Zones and for the Gateway as a whole. By comparison, the average for all Gateways in 2011 was three for Zone 1, four for Zone 2 and four for the Gateway as a whole.

* River Water Quality is based on a Scale of 1 (Poor) to 5 (Very Good).

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53 A number of additional data sources (to those identified in the 2009 GDI) were examined to establish their feasibility as indicators. However, they were found to be unsuitable for varying reasons (such as reliability and scale of available data).  
54 It should be noted that, due to the nature of rivers, pollution which manifests itself at a particular point may not have been generated or entered the water stream at or near that point.  
55 For breakdown of assessment values, see [http://www.epa.ie/qvalue/webusers](http://www.epa.ie/qvalue/webusers/)
3.5.2 Consumable Water Infrastructure

**Indicator Description:** A successful Gateway should feature reliable water infrastructure for supply to residents and industry alike. This indicator uses water source catchment data to express the proportion of the population in the relevant Gateway which occurs within the catchment areas of water sources on the Environmental Protection Agency’s (EPA) Remedial Action List (RAL)\(^{56}\). The types of sources assessed in this manner include public water schemes, public group water schemes and private group water schemes originating from surface water, ground water and springs.

Water quality testing is carried out by the Water Services Authorities (WSA) using samples taken from various points on the distribution network for households and industry serviced by each water source. The results are reported to the EPA, with compliance assessed against the standards set out in the Drinking Water Regulations. Water sources are listed on the EPA RAL where the infrastructure does not meet the necessary standard or upgrades are required\(^{57}\).

Analysis of the figures for 2011 indicates that there has been a substantial decrease in the number of water sources which were listed on the RAL in comparison to 2008. In 2011, there was one water source within the Limerick-Shannon Gateway which was listed on the RAL, with 0.52% of the total Gateway population occurring within the catchment areas of these water sources. This is a sizeable decrease from 2008, when there were five water sources within the Gateway listed on the RAL, with 38.54% of the population occurring within the catchment areas of these water sources.

<table>
<thead>
<tr>
<th>Source EPA Consumable Water Infrastructure (%)</th>
<th>Zone 1 &amp; 2</th>
<th>2008</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in Consumable Water Infrastructure (%)</td>
<td>- 38.02%</td>
<td>38.54%</td>
<td>0.52%</td>
</tr>
</tbody>
</table>

\(^{56}\) Full details of the EPA Remedial Action List are Available at: [http://www.epa.ie/downloads/pubs/water/drinking/Q1%202012%20RAL%20for%20web.pdf](http://www.epa.ie/downloads/pubs/water/drinking/Q1%202012%20RAL%20for%20web.pdf)

\(^{57}\) A full breakdown of these standards is Available at: [http://www.epa.ie/downloads/pubs/water/drinking/publicwatersupplieshandbook/Section%202.pdf](http://www.epa.ie/downloads/pubs/water/drinking/publicwatersupplieshandbook/Section%202.pdf)
3.5.3 Waste Recovery

Indicator Description: This indicator identifies the percentage of all household generated mixed municipal waste which is diverted from landfill for recycling or biological recovery\(^{58}\). Good waste management practice, as evidenced by a high percentage of waste diversion, will have positive environmental effects for all Gateways and their surroundings, as well as functioning as a "test of local authority environmental management and responsibility"\(^{59}\).

Analysis of the recycling figures for 2006 illustrates that 27.52\% of all waste generated within the Limerick-Shannon Gateway was diverted from landfill. By comparison, in 2011, this figure had increased to 42.80\%. Evaluation of the individual Zones illustrates notable changes within both Zones, with Zone 1 increasing from 27.20\% in 2006 to 37.57\% in 2011, while Zone 2 demonstrated a significant increase from 27.66\% in 2006 to 45.64\% in 2011. These figures compare with an average of 43.19\% for all Gateways and a national average of 41.41\%\(^{60}\). In the 1998 policy document, ‘Changing our Ways’, the government committed to achieving a diversion rate of 50\% of household waste within 15 years (2013)\(^{61}\), which the Limerick-Shannon Gateway remains some way off achieving.

<table>
<thead>
<tr>
<th>Year</th>
<th>Waste Recovery</th>
<th>Zone 1 &amp; 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>27.52%</td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>42.80%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Change in Waste Recovered</td>
<td>15.28%</td>
</tr>
</tbody>
</table>

* Proportion of total waste collected which is recycled.

3.5.4 Assessment

» Under the Natural and Physical Environment domain the Limerick-Shannon Gateway’s composite Index score was 5.5 in the 2012 GHDI compared to 4.9 in the 2009 GDI, this reflects an increase of 0.6.

» Under the Natural and Physical Environment domain the Limerick-Shannon Gateway’s Zone 1 Index score was 5.0 in the 2012 GHDI compared to 5.1 in the 2009 GDI, this reflects a decrease of 0.1.

» Under the Natural and Physical Environment domain the Limerick-Shannon Gateway’s Zone 2 Index score was 5.7 in the 2012 GHDI compared to 4.8 in the 2009 GDI, this reflects an increase of 0.9.

\(^{58}\) This indicator is based upon data derived from the 2006 and 2011 EPA National Waste Reports. Waste recovery percentages have been generated based on County and City council estimates as reported to the EPA. The chosen methodology identifies all waste which has not been recovered (recycled or biologically treated), and presents it as a percentage of the total of all waste generated (both recovered and residual) within the Gateway.


\(^{61}\) Ibid, p. 6.
Overall the Limerick-Shannon Gateway is performing well in the Natural and Physical Environment domain. Both river water quality and water infrastructure are of a good standard according to the most recent figures available from the EPA, although it should be noted that there has been a dis-improvement in the river water quality within Zone 1. The level of household waste recovery for recycling or biological treatment has demonstrated a sizeable increase since 2006, with the growth in recovery rates being particularly substantial within Zone 2, which had risen by 12.49%, in comparison to an increase of just 3.88% in Zone 1.

Despite the fact that the proportion of household waste recovered continues to rise for the Gateway as a whole, the differential in the increase between both Zones of the Gateway may be a cause for concern and will need to be addressed in order to ensure that the Limerick-Shannon Gateway can play its role in meeting the national household waste diversion rate of 50%. The Gateway’s most recent progress aligns with the broader trend evident for the country, with the recession and a marked fall in consumption both identified by the EPA as key factors in reducing the amounts of waste being sent to landfill and helping to achieve EU waste recovery targets.

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63 Environmental Protection Agency (2013) Press Release Mar 25 2013 EPA report shows that recycling and recovery rates are improving Available at: http://www.epa.ie/news/pr/2013/name,51205.en.html
3.6 Transport and Connectivity

3.6.1 Green Transport Usage

Indicator Description: This indicator is used to measure the proportion of people who take advantage of the various sustainable transportation modes including public transport, walking and cycling available within the Gateway. Amongst the key features of a successful Gateway will be a good quality public transport network, with a high proportion of utilisation amongst residents, and good pedestrian and cycle linkages, allowing for an adequate choice in transportation modes.

The overall percentage of people within the Limerick-Shannon Gateway (Zones 1 and 2) who use sustainable transportation modes, such as walking, cycling or public transport to get to and from work initially remained constant, from 16.76% in 2002 to 16.47% in 2006, before declining to 12.59% by 2011. This trend remained consistent across both Zones of the Gateway. By comparison, the average green transport usage across all Gateways was 14.98% in 2011. Analysis by individual Zones indicates that 21.39% of people living within Zone 1 use green transport modes to travel to and from work, while the equivalent figure for Zone 2 is just 6.02%. By comparison, the average green transport usage across all Gateways was 14.98% in 2011, while analysis by individual Zones indicates that 23.37% of people living within Zone 1 use green transport modes to travel to and from work, while the equivalent figure for Zone 2 is just 7.60%.

3.6.2 Travel-to-Work Times

Indicator Description: This indicator is based upon Census respondent’s personal experience of the duration of their journey to work. A successful Gateway will feature a higher proportion of people who will live within 30 minutes of their place of work.

In the Limerick-Shannon Gateway region, the number of people who live within 30 minutes of their place of work has increased in the period 2002 to 2011. In 2002, 60.56% of people within the Gateway lived within 30 minutes of their place of work, and by 2006 this figure had grown to 63.55%. By 2011, the figure had risen again to 65.87%. By comparison, the average percentage of people living within 30 minutes of their place of work within all Gateways was 62.11% in 2011. Analysis of the individual Zones shows that 73.64% of people living in Zone 1 are within 30 minutes of their place of work, compared with 59.80% of people who live within Zone 2.

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64 This dataset is derived from CSO Census data.
65 This dataset is derived from CSO Census data.
3.6.3 Public Transport Availability

Indicator Description: This indicator is used to assess the availability of public transportation modes within the Gateway. Accessibility and availability of public transport which facilitates ease of movement for residents of a Gateway is an important consideration.

Accessibility to transport infrastructure within the Limerick-Shannon Gateway has been established as 7 out of 10, with Zone 1 returning a figure of 9 out of 10 and Zone 2 producing a result of 6 out of 10. The overall Limerick-Shannon Gateway results are in keeping with the average public transport availability figure of 7 out of 10 produced for all Gateways.

What Transport Do They Use?

<table>
<thead>
<tr>
<th>Car &amp; Other Private Transportation</th>
<th>Zone 1</th>
<th>Zone 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>78.61%</td>
<td>93.98%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Non-car based Commuting</th>
<th>Zone 1</th>
<th>Zone 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>21.39%</td>
<td>6.02%</td>
<td></td>
</tr>
</tbody>
</table>

---

66 Pobal (2006) Towards the Development of a Transport Accessibility Index. This Index has not been updated for 2011.
3.6.4 Retail Activity

Indicator Description: This indicator measures the number of retail outlets, expressing them per 100 households, within the Gateway. The provision of essential retail services is an important function of a Gateway, and the resident population should thus have access to same. The retail sector plays a major role in attracting people to urban centres thus contributing to the overall economic vitality of those centres and supporting their role as centres of social and business interaction in the community.

Given that the provision of essential retail services to the Gateway population is an important function of a successful Gateway, by investigating the quantity of retail business availability, a clear contribution to the determination of Gateway performance within the Transport and Connectivity domain can be derived. In general scores at or above the average for all Gateways are satisfactory.

With 79,601 households and 1,719 retail outlets within the Limerick-Shannon Gateway in 2012, there are 2.16 retail outlets per 100 households within the Gateway. While Zone 1 returns a rate of 4.02 retail outlets per 100 households, Zone 2 records a rate of 1.31 retail outlets per 100 households. The average in 2012 for all Gateways was 2.37 retail outlets per 100 households.

<table>
<thead>
<tr>
<th>Zone 1 &amp; 2</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail Activity</td>
<td></td>
</tr>
<tr>
<td>Retail Outlets per 100 Households</td>
<td>2.16</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Zone 1</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail Activity</td>
<td></td>
</tr>
<tr>
<td>Retail Outlets per 100 Households</td>
<td>4.02</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Zone 2</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail Activity</td>
<td></td>
</tr>
<tr>
<td>Retail Outlets per 100 Households</td>
<td>1.31</td>
</tr>
</tbody>
</table>

67 This includes all retail outlets as listed within the GeoDirectory 2012, regardless of size, type or character of the individual retail outlets encompassing the following categories: wholesale and retail trade (including food and drink, clothing and footwear, accessories, cosmetics, household appliances, furniture, hardware, agricultural, textiles, computers, telecommunications equipment, books, music, sporting, games), repair of motor vehicles, motorcycles and personal and household goods.


69 This includes all retail outlets as listed within the GeoDirectory 2012, regardless of size, type or character of the individual retail outlets encompassing the following categories: wholesale and retail trade (including food and drink, clothing and footwear, accessories, cosmetics, household appliances, furniture, hardware, agricultural, textiles, computers, telecommunications equipment, books, music, sporting, games), repair of motor vehicles, motorcycles and personal and household goods.
3.6.5 IT Connectivity

Indicator Description: This indicator quantifies the percentage of households within the Gateway who have (and are utilising) private access to broadband (not including dial up internet access)\(^70\). A high proportion of broadband accessibility is an essential feature of a Gateway.

The percentage of households with private broadband access has grown by 45.38% (to 63.86%) since 2006 within the Limerick-Shannon Gateway, based on figures available for 2011. In 2006, broadband access was available to 24.22% of households within Zone 1, while the equivalent figure within Zone 2 was just 12.81%. In the intervening period between 2006 and 2011, household access grew to 61.06% for Zone 1 and 65.14% for Zone 2; this represents an expansion of 36.84% and 52.33% respectively over both zones. The overall average IT connectivity across all Gateways in 2011 was 63.52%; by comparison, the EU average for all 27 Member States in 2011 was 67%\(^71\).

The following table shows the percentage of households with private broadband access in Zone 1, Zone 2, and Zone 1&2 for 2006 and 2011:

<table>
<thead>
<tr>
<th>Zone</th>
<th>2006 (%)</th>
<th>Change in IT Connectivity (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zone 1</td>
<td>24.22%</td>
<td>36.84%</td>
</tr>
<tr>
<td>Zone 2</td>
<td>12.81%</td>
<td>52.33%</td>
</tr>
<tr>
<td>Zone 1&amp;2</td>
<td>18.48%</td>
<td>45.38%</td>
</tr>
</tbody>
</table>

Source: Central Statistics Office

3.6.6 Assessment

» Under the Transport and Connectivity domain the Limerick-Shannon Gateway’s composite Index score was 4.9 in the 2012 GHDI compared to 5.0 in the 2009 GDI, this reflects a decrease of 0.1.

» Under the Transport and Connectivity domain the Limerick-Shannon Gateway’s Zone 1 Index score was 4.8 in the 2012 GHDI compared to 5.0 in the 2009 GDI, this reflects a decrease of 0.2.

» Under the Transport and Connectivity domain the Limerick-Shannon Gateway’s Zone 2 Index score was 4.8 in the 2012 GHDI compared to 4.9 in the 2009 GDI, this reflects a decrease of 0.1.

\(^70\) ‘Private access’ is defined as those instances where the household has a broadband connection; it is not a measure of broadband enablement in a Gateway or Hub i.e. others on the same street or road may decide not to subscribe, but could if they so wished.


33
Evaluation of the indicators in the domain of transport and connectivity illustrates that the Limerick-Shannon Gateway has shown improvements in specific areas of the domain but further improvements are required. The number of people who live within 30 minutes of their place of work has risen slightly since 2006, which is indicative of positive progress. However, opportunities to exploit the relative proximity of people to their place of work have not been harnessed successfully, with fewer people walking, cycling or using public transport to get to work in 2011 than in 2006. Positive progress in this area will result from initiatives such as the Limerick Smarter Travel proposal, a joint scheme between Limerick City Council and Limerick County Council in partnership with the University of Limerick. This will see €9m in funding made available for sustainable transport projects which will provide for improved cycling ways and parking points, better walking facilities and school and workplace travel planning72. In addition, the National Transport Authority (NTA) is currently seeking a private sector partner to establish a Limerick bike scheme, similar to the Dublin Bikes scheme73. In terms of public transport accessibility, the Limerick-Shannon Gateway scores for both Zones 1 and 2 were broadly in keeping with the national Gateway averages.

The below average rate of retail units per 100 households appears to suggest that improvements could be made in this area, however it should be noted that the number of households within the Gateway is relatively high compared with other Gateways. The Retail Planning Guidelines 201274 advocate a sequential approach to the location of retail development in city and town centres, and only to allow retail development in edge of centre or out of centre locations where all other options have been exhausted. The Gateway has been relatively successful in achieving this with a much higher proportion of total retail units in the Gateway concentrated within the urban core (Zone 1).

While IT connectivity has improved considerably since 2011, further improvements are required to support the Gateway in attracting inward investment and increasing its competitiveness. The recently launched National Broadband Plan for Ireland75, which sets out targets to achieve broadband download speeds of 70Mbps with a minimum of 40Mbps generally available and 30Mbps available in harder to reach rural areas, should bring further advancements in this area.

74 Department of Environment, Community and Local Government (2012) Guidelines for Planning Authorities Retail Planning p.30
3.7 Health and Wellness

3.7.1 Mortality

Indicator Description: This indicator is a measure of premature mortality within a Gateway, and can be used as a measure of the physical health of the population and the quality of life within a Gateway. Therefore a lower Years of Potential Life Lost (YPLL) score is an indication of a healthy Gateway population.

Years of potential life lost (YPLL) is a mortality measure. It measures, per 1,000 people, the total number of years below the age of 79.6 (life expectancy for an Irish adult) that a 1,000 person group loses. For example, if a person dies before the age of 79.6 years, they contribute to this sum. If they die after this age, they do not contribute to this sum. The YPLL for each 1,000 group of people, averaged across counties in Ireland is between 21.95 and 95.00 (combining both 2006 and 2011 data). The national average for YPLL has reduced from 59.84 to 55.10 in the period 2006-2011. In terms of comparable EU and OECD equivalents, the OECD average is 76.7 and 72.6 (2006-2011) and EU is 80.5 and 72.0 (2006-2011).

The recorded YPLL for 2011 was 80.77 per 1,000 of the population, representing a deterioration of 9.89 years on the 2006 YPLL of 70.88 (or in other words an increase in the premature mortality rate). This was the highest (worst) YPLL score of all the Gateways, with Zone 1 particularly high. By comparison, the average for all Gateways stands at 63.86 (per 1,000 of the population).

The recorded YPLL for 2011 was 80.77 per 1,000 of the population, representing a deterioration of 9.89 years on the 2006 YPLL of 70.88 (or in other words an increase in the premature mortality rate). This was the highest (worst) YPLL score of all the Gateways, with Zone 1 particularly high. By comparison, the average for all Gateways stands at 63.86 (per 1,000 of the population).

<table>
<thead>
<tr>
<th>Year</th>
<th>Zone 1</th>
<th>Zone 2</th>
<th>Zone 1 &amp; 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>85.81 YPLL</td>
<td>55.94 YPLL</td>
<td>70.88 YPLL</td>
</tr>
<tr>
<td>2006</td>
<td>94.81 YPLL</td>
<td>66.73 YPLL</td>
<td>80.77 YPLL</td>
</tr>
</tbody>
</table>

* Year of Potential Life Lost (YPLL) per 1,000 people. A reduced YPLL indicates a lower premature mortality.

76 This is a new indicator based on data which was unavailable at the time of the 2009 GDI; information from 2006 and 2011 was utilised to inform this indicator.
77 YPLL is typically determined per 100,000 of the population, but for the purposes of this study has been scaled down to ‘per 1,000 of the population’ for comparative purposes (many Gateways have populations less 100,000).
78 The life expectancy for an Irish adult stands at 79.6 years. For the purposes of calculating Years of Potential Life Lost, this was rounded to 80 years in this study. Further information is available from the CSO Life Expectancy Tables at: http://www.cso.ie/Quicktables/GetQuickTables.aspx?FileName=VSA20.asp&TableName=LifeExpectancy&StatisticalProduct=DB_VS.
79 Comparable European and OECD studies which must take into account a wide variety of life expectancies selects a more suitable 65 year value. Meaning that in these studies any individual who dies over the age of 65 does not contribute to the YPLL.
3.7.2 Birth Weight

Indicator Description: This indicator measures the average weight at birth of children born to parents from the Gateway. The birth weight\(^{80}\) can be used to provide an accurate indication of the health and well being of mothers within the Gateway, with higher average birth weights seen as being indicative of a healthier population.

Low birth weight is a major public health concern, primarily because babies who are born with a low birth weight are at a greatly increased risk of death in the first week and the first year of life. Furthermore, low birth weight is associated with a number of adverse developmental, educational, behavioural and socio-economic outcomes in childhood, adolescence and later life\(^{81}\). Low birth weight is typically considered to be those babies born weighing less than 2.5kgs.

The average birth weight of babies born to mothers who lived within the Limerick-Shannon Gateway in 2006 was 3.43kgs; the figure produced for 2011 was 3.41kgs, illustrating a decrease of 0.02kgs. The average birth weight in Zone 2 was 3.43kgs, having decreased by 0.04kgs on the figure for 2006, but was slightly higher than that produced for Zone 1, which at 3.39kg remained unchanged between 2006 and 2011. The average birth weight for all Gateways in 2011 was 3.46kgs.

<table>
<thead>
<tr>
<th>Birth Weight</th>
<th>Source: HSE</th>
<th>Change in Birth Weight (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>Zone 1</td>
<td>2011</td>
</tr>
<tr>
<td>3.39 KG</td>
<td></td>
<td>3.39 KG</td>
</tr>
<tr>
<td></td>
<td>Change in Birth Weight (%)</td>
<td>- 0.00 KG</td>
</tr>
<tr>
<td>2006</td>
<td>Zone 2</td>
<td>2011</td>
</tr>
<tr>
<td>3.48 KG</td>
<td></td>
<td>3.43 KG</td>
</tr>
<tr>
<td></td>
<td>Change in Birth Weight (%)</td>
<td>- 0.04 KG</td>
</tr>
<tr>
<td>2006</td>
<td>Zone 1 &amp; 2</td>
<td>2011</td>
</tr>
<tr>
<td>3.43 KG</td>
<td></td>
<td>3.41 KG</td>
</tr>
<tr>
<td></td>
<td>Change in Birth Weight (%)</td>
<td>- 0.02 KG</td>
</tr>
</tbody>
</table>

3.7.3 Primary Health Care

Indicator Description: This indicator quantifies the number of General Practitioners per 1,000 of the population within each Gateway. This gives an indication of the relative access to primary healthcare for the residents of the Gateway, and can be used as an indication of the longer term health of the population.

In 2011, the number of General Practitioners (GPs) within Zone 1 of the Limerick-Shannon Gateway was 1.31 GPs per 1,000 of the population, and was 0.28 GPs per 1,000 of the population within Zone 2; this produced an overall figure of 0.76 GPs per 1,000 of the population for the Gateway. Given that the national Gateway average has been recorded as 0.98 GPs per 1,000 of the population, the Gateway is performing below the average for all Gateways and produced the lowest recorded rate of all the Gateways in 2011.

80 Data derived from Health Service Executive datasets
3.7.4 Assessment

» Under the Health and Wellness domain the Limerick-Shannon Gateway’s composite Index score was 3.5 in the 2012 GHDI compared to 4.0 in the 2009 GDI, this reflects a decrease of 0.5.
» Under the Health and Wellness domain the Limerick-Shannon Gateway’s Zone 1 Index score was 4.0 in the 2012 GHDI compared to 4.0 in the 2009 GDI, this reflects no change.
» Under the Health and Wellness domain the Limerick-Shannon Gateway’s Zone 2 Index score was 3.6 in the 2012 GHDI compared to 4.9 in the 2009 GDI, this reflects a decrease of 1.3.

Analysis of the health and wellness domain reveals that the Limerick-Shannon Gateway is performing below average within all indicators of the domain, with a particularly high YPLL notable for Zone 1 and a lower than average provision of primary health care services (as represented by GPs per 100 of the population). The future health care service needs of the growing Zone 2 population are highlighted, particularly given the higher age dependency rate for this Zone. The quality of services which are available can influence health and wellbeing of those who reside within a Gateway, and can have profound implications for their wider quality of life. Health, wellness and a high quality of life are essential factors in attracting both inward migration and economic investment to an area. Based on both the results of the indicator analysis and the findings of the perception survey, enhancements are required in order to strengthen the urban core, to build on the ongoing work of making it an attractive place to live, invest and do business in.
3.8 Crime

3.8.1 Crime

Indicator Description: This indicator quantifies the number of crimes per 100 of the population. It contains breakdowns in a number of crime categories. Crime data only includes reported crimes i.e. crimes that become known, or are reported to the Gardaí. Many crimes are not reported. Crime negatively affects economic and health systems at the national and regional levels. It has been identified as an impediment to foreign investment and a cause of ‘capital flight’ and ‘brain drain’.

Analysis of the crime figures for the Limerick-Shannon Gateway illustrates a slight decrease in the overall crime rate, from 7 (7.32) crimes per 100 of the population in 2006 to 6 (6.38) crimes per 100 of the population in 2011; these figures remain constant across both Zones of the Gateway throughout this period and are higher than the average for all Gateways in 2011 of 5 (5.32).

Analysis of the crime figures indicates increases in certain types of offences and decreases in others between 2006 and 2011. Amongst the offences which have seen the most substantial increases are burglary and related offences (up by 9.67% or 126 instances), fraud, deception and related offences (up by 22.83% or 37 instances), robbery, extortion and hijacking offences (up by 26.13% or 29 instances), and controlled drug offences (up by 37.84% or 294 instances). Amongst the offences which have seen the most dramatic decreases were theft and related offences (down by 15.85% or 871 instances), damage to property and the environment (down by 24.83% or 785 instances), and dangerous or negligent acts, (down by 40% or 360 instances).

<table>
<thead>
<tr>
<th></th>
<th>2006</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Offences Committed</td>
<td>15,403</td>
<td>14,200</td>
</tr>
<tr>
<td>Change in Crime</td>
<td>-1,203</td>
<td>-0.94</td>
</tr>
</tbody>
</table>

*Statistics relates to total crimes committed and the crimes per 100 of the population.

---

82 This domain has replaced the Social Facilities and Networks domain which formed part of the 2009 GDI, and which was omitted due to a lack of suitable data. It should however be note that the ‘Social Facilities and Networks’ domain was largely focussed on crime statistics in any event.

83 Crime categories: Murder attempts/threats, assaults and harassments; burglary and related offences; controlled drug offences; dangerous or negligent acts; damage to property and the environment; fraud, deception and related offences; public order and social code offences; robbery, extortion and hijacking offences; theft and related offences; and weapons and explosions offences. The breakdowns do not include data on rape, sexual offences and kidnappings due to data protection issues and sensitivity for individual victims who might be easily identified were this information published at Garda station level. Also excluded is the category of ‘offences against Government, justice procedures and organisation of crime’ a category dominated by offences committed by people in custody and those who breach court orders.


» Under the Crime domain the Limerick-Shannon Gateway’s composite Index score was 4.1 in the 2012 GHDI compared to 4.3 in the 2009 GDI, this reflects a decrease of 0.2.
» Under the Crime domain the Limerick-Shannon Gateway’s Zone 1 Index score was 4.1 in the 2012 GHDI compared to 4.3 in the 2009 GDI, this reflects a decrease of 0.2.
» Under the Crime domain the Limerick-Shannon Gateway’s Zone 2 Index score was 4.1 in the 2012 GHDI compared to 4.3 in the 2009 GDI, this reflects a decrease of 0.2.

Crime expressed per 100 of the population within the Limerick-Shannon Gateway has seen a slight decrease based on a comparison of the 2006 and 2011 figures. This is good news for the Gateway, and has positive implications, especially for the economic well being of Limerick-Shannon and the quality of life of its residents. The results of the perception survey appear to support this, with slightly more people agreeing that Limerick-Shannon is an attractive place to live in 2011, than was the case in 2009. However, continuing this trend by driving further reductions in the crime rate is important for enhancing the Gateway’s ability to attract new investment.
### 3.9.1 Affluence and Deprivation

Indicator Description: This indicator measures demographic growth, social class composition and labour market strength to compile a single score for Affluence and Deprivation. The measurement of Affluence and Deprivation is an effective method of establishing the performance of Gateways, with those featuring high levels of affluence viewed as being successful in comparison with those which feature high levels of deprivation. An in-depth overview of deprivation and affluence is available on the Pobal HP Deprivation Index (Haase and Pratschke, 2012).

An examination of the Affluence and Deprivation Index for the Limerick-Shannon Gateway indicates that there has been an overall improvement in the level of affluence which is experienced by residents of the Gateway since 2006. The overall score returned by the Gateway in 2011 was 0.40, up by 0.07 from the previous figure of 0.33 produced in 2006. Analysis of the individual Zones, illustrates a higher concentration of deprivation within Zone 1 (-1.25 in 2006, -0.70 in 2011) in comparison with Zone 2, which has returned relatively affluent results by comparison, although this does appear to be demonstrating some decline (from 2.14 in 2006 and 1.57 in 2011). The gap between these two Zones does appear to have narrowed between 2006 and 2011. By comparison, the average figures for all Gateways were -0.07 within Zone 1, -0.24 within Zone 2 and -0.03 across both Zones in 2011.

<table>
<thead>
<tr>
<th>Affluence and Deprivation</th>
<th>Zone 1</th>
<th>Zone 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source: Haase and Pratschke, (2011)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relative Index Change</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>Zone 1</td>
<td>-1.25</td>
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<tr>
<td>2011</td>
<td></td>
<td>0.54</td>
</tr>
<tr>
<td>Relative Index Change</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>Zone 2</td>
<td>2.14</td>
</tr>
<tr>
<td>2011</td>
<td></td>
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</tbody>
</table>

### 3.9.2 Assessment

- Under the Affluence and Deprivation domain the Limerick-Shannon Gateway’s **composite** Index score was 5.1 in the 2012 GHDI compared to 5.3 in the 2009 GDI, this reflects a decrease of 0.2.
- Under the Affluence and Deprivation domain the Limerick-Shannon Gateway’s **Zone 1** Index score was 4.8 in the 2012 GHDI compared to 5.0 in the 2009 GDI, this reflects a decrease of 0.2.
- Under the Affluence and Deprivation domain the Limerick-Shannon Gateway’s **Zone 2** Index score was 5.6 in the 2012 GHDI compared to 5.6 in the 2009 GDI, this reflects no change.

---

86 This indicator is based on the Pobal HP Deprivation Index (Haase and Pratschke, 2012). Available at: https://www.pobal.ie/Pages/New-Measures.aspx.
87 Ibid.
As is the case in any major urban centre, there is likely to be considerable difference in the affluence and deprivation levels experienced in various parts of the Gateway. Overall, a very slight increase in the rate of affluence is noted for 2011 compared with 2006, largely driven by a decrease in the level of relative deprivation which is evident within Zone 1. In comparison, Zone 2, which has previously been responsible for enhancing the overall affluence rating of the wider Gateway, has experienced a decline in affluence in the 2006-2011 period. However, the level of affluence is not on the same scale as that which is experienced in other Gateways. Zone 1 remains a generally deprived area, although there has been a sizeable improvement since 2006.

Where other Zone 1 areas of the larger Gateways are managing to retain or enhance their performance across domains, such as the number of people with third level qualifications, with positive implications for affluence, Zone 1 of the Limerick-Shannon Gateway has been less successful in this regard. It is possible that the changes in the relative affluence and deprivation, which are evident within the indicator, could be linked to the ongoing Limerick Regeneration Project, which has seen large numbers of people leaving the most deprived areas of the Limerick City while these areas are redeveloped. It is possible that some of the residents of these pockets of deprivation have been temporarily relocated to areas outside of Zone 1 and possibly within Zone 2, and this could be responsible for a certain amount of the changes which are evident within the affluence and deprivation indicator.

<table>
<thead>
<tr>
<th></th>
<th>Zone 1 &amp; 2</th>
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<tbody>
<tr>
<td>Affluence and Deprivation</td>
<td>0.33</td>
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<tr>
<td>Relative Index Change</td>
<td>0.07</td>
</tr>
<tr>
<td></td>
<td>0.40</td>
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4.0 Limerick-Shannon Gateway Perception Survey

4.1 Introduction

The Perception study in 2012 involved a common survey across the nine Gateways, using on-street interviews with a random sample of the adult resident population in each Gateway. All survey interviewing was conducted in October 2012.

The research sample included the main urban zones of each Gateway as well as those areas in close connectivity with each urban zone.

Importantly, the survey fieldwork was structured so that the sample in each Gateway is as representative as possible of residents at each location.

In each Gateway interviewing was spread across at least one full week and was structured so that each day of the week and each time of day were represented in the survey.

Over 250 interviews were conducted in each Gateway, with over 2,300 interviews being conducted in total across the full nine Gateways. The statistical margin of error on a sample size of 2,300 is just +/- 2%; the margin of error on a sample of 250 is +/- 6.2% and +/-0.62 on the 10 point scales. In this survey, any measure for an individual Gateway that is within 6% of the survey average is considered to be ‘at the Gateway Average’. The survey questionnaire asked Gateway residents to comment on each of the following subjects:

- Awareness of the Gateway idea
- Business and Employment in the Gateway
- Education, Skills, and Training Provision in the Gateway
- Services in the Gateway
- Health and Well-being in the Gateway
- Overall assessment of the Gateway as a place to live
- Institutional Environment in the Gateway
- Physical Environment in the Area in the Gateway
- Social Facilities/Supports in the Gateway

4.2 Findings of Perception Survey

In overall terms, perceptions of Limerick-Shannon among residents typically reflect the Gateway average across the key issues covered in the survey.

Awareness that Limerick-Shannon is a designated Gateway is only at 29%. However, Limerick-Shannon residents are highly likely to agree that being a Gateway is a good idea for the town and supporting region and is generally important for the area. Unfortunately, they are also the least likely of all Gateways to perceive that being a Gateway has had any practical significance to date.
Limerick-Shannon residents are positive about the provision of education, skills and training. There is a particularly strong sense that third level education and training has improved in recent years. In relation to their physical environment, there is also a sense of positive development in relation to traffic congestion and air quality. Perceptions of social facilities and supports in Limerick-Shannon exhibit a strong divide in evaluations between sporting and art facilities. Limerick-Shannon residents provide the strongest overall rating to sporting facilities and are the most positive in the survey about their development in the last five years. However, they provide the lowest relative rating on the quality of libraries and general arts/culture facilities in their area.

As an overall cultural assessment, Limerick-Shannon residents are generally positive. They have above average perceptions on Limerick-Shannon as an attractive and enjoyable place to live and work and are relatively more likely to perceive the area as being well equipped for the future. Interestingly, Limerick-Shannon residents are also most likely across all Gateways to believe that local community support and participation has improved over the last five years.

As a general rule, the perceptions of those who live in the core Gateway area (Zone 1) and those from the wider functional areas of the Limerick-Shannon Gateway are consistently similar throughout the survey. Where differences do emerge they are typically focused on a recurring series of issues. Awareness of the Gateway idea for example is invariably higher in Zone 1 as is the sense that being a Gateway is a good idea for the town and has had practical significance to date. On the physical environment and services, residents of Zone 1 are typically more positive about the provision of ICT and specifically high speed broadband. The same is also true of public transport, where residents of Zone 2 are more critical both in terms of overall provision and the extent to which it has improved in the last five years. Other than this, services in the Gateway are ranked in a very similar manner between the two groups of residents. Notwithstanding the frequent uniformity, Zone 1 residents are likely to deliver a more positive overall cultural assessment than those from the wider area, typically perceiving that the Gateway is a relatively more attractive and enjoyable place to live and work.

The results of the perception survey for Limerick-Shannon Gateway are provided in the Appendices to this report.
5.0 GDI 2009 Versus GHDI 2012

5.1 GDI 2009 and GHDI 2012: Indices Scores

The *composite* Index for the Limerick-Shannon Gateway is shown with the bar chart below. This shows the *composite* Gateway and Hubs Index 2012 score compared to the 2009 Index and how it is performing across the eight domains considered. It is also important to note that, within each domain, the indicators are evenly weighted. The weighted sum for each domain is then used in calculating the *composite* Index.
A summary for the **Zone 1** and **Zone 2** areas of the Limerick-Shannon Gateway are shown below, demonstrating how each Zone is performing across the eight domains and an overall **composite** score representing the Index score per Zone for 2012 and 2009.

**Limerick-Shannon Zone 1 Index Score**

<table>
<thead>
<tr>
<th>Domain</th>
<th>2009</th>
<th>2012</th>
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</thead>
<tbody>
<tr>
<td>Population</td>
<td>51</td>
<td>46</td>
</tr>
<tr>
<td>Enterprise &amp; Employment</td>
<td>43</td>
<td>51</td>
</tr>
<tr>
<td>Knowledge &amp; Innovation</td>
<td>50</td>
<td>50</td>
</tr>
<tr>
<td>Natural &amp; Physical Environment</td>
<td>51</td>
<td>48</td>
</tr>
<tr>
<td>5 Transport &amp; Connectivity</td>
<td>40</td>
<td>40</td>
</tr>
<tr>
<td>6 Health &amp; Wellness</td>
<td>43</td>
<td>41</td>
</tr>
<tr>
<td>7 Crime</td>
<td>48</td>
<td>48</td>
</tr>
<tr>
<td>8 Deprivation &amp; Affluence</td>
<td>47</td>
<td>47</td>
</tr>
</tbody>
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**Limerick-Shannon 2009** 4.7  (2009)  
**Limerick-Shannon 2012** 4.7  (2012)  

**Gateway Average**

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<tr>
<th>Domain</th>
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<th>2012</th>
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</thead>
<tbody>
<tr>
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<tr>
<td>Enterprise &amp; Employment</td>
<td>45</td>
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<tr>
<td>Knowledge &amp; Innovation</td>
<td>57</td>
<td>57</td>
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<tr>
<td>Natural &amp; Physical Environment</td>
<td>48</td>
<td>48</td>
</tr>
<tr>
<td>5 Transport &amp; Connectivity</td>
<td>49</td>
<td>36</td>
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<tr>
<td>6 Health &amp; Wellness</td>
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<td>41</td>
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<tr>
<td>7 Crime</td>
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<td>56</td>
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<tr>
<td>8 Deprivation &amp; Affluence</td>
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<td>51</td>
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**Limerick-Shannon Zone 2 Index Score**

<table>
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<th>2012</th>
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<td>Enterprise &amp; Employment</td>
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<td>Knowledge &amp; Innovation</td>
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<td>57</td>
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<tr>
<td>Natural &amp; Physical Environment</td>
<td>48</td>
<td>48</td>
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<tr>
<td>5 Transport &amp; Connectivity</td>
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<td>41</td>
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<td>7 Crime</td>
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<tr>
<td>8 Deprivation &amp; Affluence</td>
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<td>51</td>
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**Limerick-Shannon 2009** 5.0  (2009)  
**Limerick-Shannon 2012** 5.1  (2012)  

**Gateway Average**
Appendix 1 - Steering Committee

Name
Mr. Gerry Finn
Mr. Adrian O’Donoghue
Mr. Stephen Blair
Ms. Derville Brennan
Mr. Niall Cussen
Mr. Michael Walsh
Dr. Barry Vaughan
Mr. Rory O’Rua

Title
Director
Policy & Research Officer
Director
Research & Communications Officer
Senior Planning Adviser
Waterford City Manager
Policy Analyst
Assistant Principal

Organisation
Border, Midland and Western Regional Assembly
Southern and Eastern Regional Assembly
Department of Environment, Community and Local Government
County and City Managers Association
Department of An Taoiseach
Department of Public Expenditure and Reform

Appendix 2 - Stakeholder Engagement

CCMA and RPGs GHDI Stakeholder Consultation Workshop
Dublin City Council, Woodquay, Dublin 8. February 20th 2013

Name
» Padraig Maguire
» Ann Bogan
» Turlough King
» Owen Keegan
» David Irvine
» Joe O’Neill
» Paul Foley
» Joan Martin
» Pat Gallagher
» Aoife Moore
» John Bradley
» Gavin Daly
» Justin Gleseson
» Brian Beck
» Declan Kirrane
» James Lavin
» Bryan Riney
» Michael Walsh
» Teresa O’Reilly,
» Gerry Finn
» Adrian O’Donoghue
» Stephen Blair
» Derville Brennan
» Niall Cussen
» William Hynes
» Stephen Purcell
» James Sweeney
» John O’Mahony

Title
RPG Officer
Senior Planner
Executive Planner
County Manager
Senior Planner
City Manager
Senior Executive Officer
Louth County Manager
Senior Planner
RPG Officer
RPG Officer
ESPON National Contact Point
AIRO Project Manager
Senior Planner
Director of Services
RPG Officer
PRG Officer
City Manager
RPG Officer
Director
Policy & Research Officer
Director
Research & Communications Officer
Senior Adviser
Director
Senior Associate
Planning Consultant
Associate Director

Organisation
Border Regional Authority
Cork City Council
Dublin Regional Authority
DLR County Council
DLR County Council
Galway City Manager
Limerick City and County Council
Louth County Council
Meath County Council
Midlands Regional Authority
Mid-West Regional Authority
NIRSA/ESPON
NIRSA/AIRO
North Tipperary County Council
Offaly County Council
South-East Regional Authority
South-West Regional Authority
Waterford City Council
West Regional Authority
BMW Regional Assembly
BMW Regional Assembly
Southern & Eastern Regional Assembly
Southern & Eastern Regional Assembly
Department of Environment,
Future Analytics Consulting
Future Analytics Consulting
Future Analytics Consulting
Behaviours and Attitudes
## S&E Region GHDI 2012 Stakeholder Consultation Workshop

Assembly House, O'Connell Street Waterford. March 20th 2013

<table>
<thead>
<tr>
<th>Name</th>
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<tr>
<td>Steve MacFeely</td>
<td>Assistant Director General</td>
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<td>Behaviours &amp; Attitudes</td>
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# BMW Regional GHDI 2012 Stakeholder Consultation Workshop

(Ballina/Castlebar, Galway, Midland, Sligo and Tuam)

BMW Regional Assembly, Ballaghaderreen, Co. Roscommon. March 21st 2013

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Organisation</th>
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<tbody>
<tr>
<td>Michael Brougham</td>
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<td>Dominic Doheny</td>
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# BMW Region GHDI 2012 Stakeholder Consultation Workshop

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<tr>
<td>Jonathan Condell</td>
<td>Assistant Planner</td>
<td>Monaghan County Council</td>
</tr>
<tr>
<td>Helen Hughes</td>
<td>CEO</td>
<td>Monaghan County Council</td>
</tr>
<tr>
<td>Stiofán O’Cualain</td>
<td>Director</td>
<td>Údarás na Gaeltachta</td>
</tr>
<tr>
<td>Gerry Finn</td>
<td>Policy &amp; Research Officer</td>
<td>BMW Regional Assembly</td>
</tr>
<tr>
<td>Adrian O’Donoghue</td>
<td>Research &amp; Communications Officer</td>
<td>BMW Regional Assembly</td>
</tr>
<tr>
<td>Derville Brennan</td>
<td></td>
<td>Southern &amp; Eastern Regional Assembly</td>
</tr>
</tbody>
</table>

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**Name**

- Michael Brougham
- Barry Egan
- Brian Barrett
- Liam Hanrahan
- Liam Gavin
- Catherina Blewitt
- John Nugent
- Joe Gilmore
- Paul Benson
- Sandra Ganly
- Dominic Doheny
- Ruth McNally
- Sarah Morgan
- Aoife Moore
- Frank Moylan
- Teresa O’Reilly
- Deirdre Frost
- Gerry Finn
- Adrian O’Donoghue
- William Hynes
- Stephen Purcell
- John O’Mahony

**Title**

- Midlands Regional Manager
- West Regional Manager
- Senior Executive Officer
- Administrative Officer
- Senior Engineer
- Regional Manager, West
- Regional Manager, North West
- CEO
- Ballina Town Manager
- Director
- Former President
- Director
- Policy and Research Officer
- RPG Officer
- Senior Planner
- RPG Officer
- Policy Analyst
- Director
- Policy & Research Officer
- Director
- Senior Associate
- Associate Director

**Organisation**

- Enterprise Ireland
- Enterprise Ireland
- Galway City Council
- Galway City Council
- Galway County Council
- IDA
- IDA
- Knock Airport
- Mayo County Council
- MetricIreland
- Midland Gateway Chamber
- Midland Regional Authority
- Midland Regional Authority
- Midland Regional Authority
- Sligo County Council
- West Regional Authority
- Western Development Commission
- BMW Regional Assembly
- BMW Regional Assembly
- Future Analytics Consulting
- Future Analytics Consulting
- Behaviours and Attitudes

---

**Name**

- Padraig Maguire
- Ger Finn
- Denis Kelly
- Lorretta McNicholas
- Paddy Matthews
- Deirdre Craven
- Joan Martin
- David Storey
- Tóirleach Gourley
- Jonathan Condell
- Helen Hughes
- Stiofán O’Cualain
- Gerry Finn
- Adrian O’Donoghue
- Derville Brennan

**Title**

- RPG Officer
- Director of Services
- Senior Executive Planner
- Research and Policy Manager
- Vice President
- Regional Executive, NE
- County Manager
- Senior Executive Officer
- Senior Executive Planner
- Acting Town Engineer
- Assistant Planner
- CEO
- Director
- Policy & Research Officer
- Research & Communications Officer

**Organisation**

- Border Regional Authority
- Cavan County Council
- Donegal County Council
- Donegal County Council
- Dundalk Chamber of Commerce
- IDA
- Louth County Council
- Louth County Council
- Monaghan County Council
- Monaghan County Council
- Monaghan County Council
- Údarás na Gaeltachta
- BMW Regional Assembly
- BMW Regional Assembly
- Southern & Eastern Regional Assembly
Appendix 3 - Perception Survey Findings

Limerick-Shannon Gateway Perception Survey

The colour coding system used in the charts below broadly applies a statistical margin of error +/- 6.2% and +/- 0.62 on the 10 point scales) to provide readers with an immediate assessment of how the Gateway performs against the survey average.

<table>
<thead>
<tr>
<th>Gateway</th>
<th>2009</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Limerick-Shannon Gateway</td>
<td>754</td>
<td>759</td>
</tr>
<tr>
<td>Colour Coding</td>
<td>Green</td>
<td>Green</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Response</th>
<th>2009</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awareness of the “Gateway” idea</td>
<td>770</td>
<td>800</td>
</tr>
<tr>
<td>Gateway as a good idea for the town itself</td>
<td>799</td>
<td>811</td>
</tr>
<tr>
<td>Gateway as a good idea for the surrounding region</td>
<td>782</td>
<td>805</td>
</tr>
<tr>
<td>Gateway is important for the area</td>
<td>801</td>
<td>813</td>
</tr>
<tr>
<td>Gateway is important for the area</td>
<td>781</td>
<td>784</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Status</th>
<th>2009</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gateway area as a Location for business</td>
<td>(3.1/10)</td>
<td>(3.1/10)</td>
</tr>
<tr>
<td>Gateway area as a Location for employment</td>
<td>(3.1/10)</td>
<td>(3.1/10)</td>
</tr>
</tbody>
</table>

Legend:
- Green: Above Gateway Average
- Yellow: At Gateway Average
- Red: Below Gateway Average
- Orange: Improved
- Pink: Declined
- White: No Change
<table>
<thead>
<tr>
<th>Status</th>
<th>Perception Study Question</th>
<th>Response</th>
<th>Total (All Gateways)</th>
<th>Limerick 2012</th>
<th>Limerick 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Services in the Gateway</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rating of Public transport</td>
<td>(1/10)</td>
<td>6.62</td>
<td>6.15</td>
<td>6.85</td>
</tr>
<tr>
<td></td>
<td>Rating of Health services</td>
<td>(1/10)</td>
<td>5.8</td>
<td>5.74</td>
<td>5.51</td>
</tr>
<tr>
<td></td>
<td>Rating of Other public services</td>
<td>(1/10)</td>
<td>6.1</td>
<td>5.99</td>
<td>6.17</td>
</tr>
<tr>
<td></td>
<td>Rating of Shopping facilities</td>
<td>(1/10)</td>
<td>7.38</td>
<td>7.04</td>
<td>7.53</td>
</tr>
<tr>
<td></td>
<td>Rating of Recreation facilities</td>
<td>(1/10)</td>
<td>6.8</td>
<td>6.68</td>
<td>6.84</td>
</tr>
<tr>
<td></td>
<td>Do you live within a 5 minute walk of any of these local services</td>
<td>Yes</td>
<td>69%</td>
<td>80%</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Public transport within the Gateway area has</td>
<td>improved</td>
<td>39%</td>
<td>25%</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>Health services within the Gateway area has</td>
<td>improved</td>
<td>19%</td>
<td>16%</td>
<td>31%</td>
</tr>
<tr>
<td></td>
<td>Other public services within the Gateway area has</td>
<td>improved</td>
<td>16%</td>
<td>14%</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>Shopping facilities within the Gateway area has</td>
<td>improved</td>
<td>50%</td>
<td>49%</td>
<td>6%</td>
</tr>
<tr>
<td></td>
<td>Recreation facilities within the Gateway area has</td>
<td>improved</td>
<td>36%</td>
<td>35%</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td><strong>Health and Well-being in the Gateway</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>General health/well-being of the people living in the Gateway</td>
<td>(1/10)</td>
<td>6.4</td>
<td>6.45</td>
<td>6.69</td>
</tr>
<tr>
<td></td>
<td>General health/well-being within the Gateway area has</td>
<td>improved</td>
<td>22%</td>
<td>23%</td>
<td>8%</td>
</tr>
</tbody>
</table>

**Legend**
- **Above Gateway Average**
- **At Gateway Average**
- **Below Gateway Average**
- **Highest among Gateways**
- **Lowest among Gateways**
<table>
<thead>
<tr>
<th>Status</th>
<th>Perception Study Question</th>
<th>Response</th>
<th>Total (All Gateways)</th>
<th>Limerick 2012</th>
<th>Limerick 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Social Facilities/Supports in the Gateway</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rating of Sporting facilities</td>
<td>(1/10)</td>
<td>7.48</td>
<td>8.03</td>
<td>8.01</td>
</tr>
<tr>
<td></td>
<td>Rating of Entertainment facilities</td>
<td>(1/10)</td>
<td>6.84</td>
<td>6.90</td>
<td>6.86</td>
</tr>
<tr>
<td></td>
<td>Rating of Parks</td>
<td>(1/10)</td>
<td>6.75</td>
<td>6.09</td>
<td>6.16</td>
</tr>
<tr>
<td></td>
<td>Rating of Libraries</td>
<td>(1/10)</td>
<td>6.81</td>
<td>5.86</td>
<td>6.38</td>
</tr>
<tr>
<td></td>
<td>Rating of Arts/culture facilities</td>
<td>(1/10)</td>
<td>6.9</td>
<td>5.94</td>
<td>6.38</td>
</tr>
<tr>
<td></td>
<td>Sporting facilities within the Gateway area has...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Improved</td>
<td></td>
<td>56%</td>
<td>72%</td>
<td>2%</td>
</tr>
<tr>
<td></td>
<td>Entertainment facilities within the Gateway area has...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Improved</td>
<td></td>
<td>38%</td>
<td>36%</td>
<td>6%</td>
</tr>
<tr>
<td></td>
<td>Parks within the Gateway area has...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Improved</td>
<td></td>
<td>43%</td>
<td>37%</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>Libraries within the Gateway area has...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Improved</td>
<td></td>
<td>36%</td>
<td>28%</td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>Arts/culture facilities within the Gateway area has...</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Improved</td>
<td></td>
<td>38%</td>
<td>28%</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>Rating of Level of local community support and participation</td>
<td>(1/10)</td>
<td>6.57</td>
<td>6.86</td>
<td>6.61</td>
</tr>
<tr>
<td></td>
<td>Improved</td>
<td></td>
<td>35%</td>
<td>47%</td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>Local community support &amp; participation in the Gateway area has...</td>
<td>Improved</td>
<td>35%</td>
<td>47%</td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td>Participate in voluntary or community organisations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Regularly</td>
<td></td>
<td>16%</td>
<td>22%</td>
<td>-</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Legend</th>
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<tbody>
<tr>
<td>Above Gateway Average</td>
</tr>
<tr>
<td>At Gateway Average</td>
</tr>
<tr>
<td>Below Gateway Average</td>
</tr>
<tr>
<td>Status</td>
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