

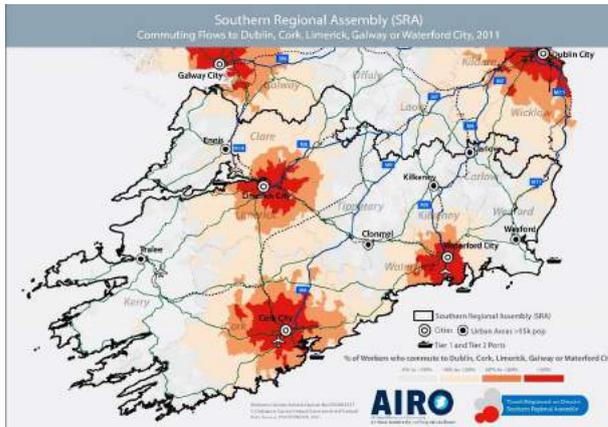
Kerry in the context of a strong Southern Region

Submission to the National Planning Framework

1. Introduction and Executive Summary

The purpose of this submission is to set out the vision for County Kerry in the National Planning Framework in the context of a regional strategy, with its complementary links to both Cork and Limerick, thus creating a critical mass that will offer a credible counter balance to the wider Dublin region and which will also energise the entire Atlantic Gateway corridor as envisioned in the Irish Academy of Engineers report, “**The Atlantic City Regions-Development & Connectivity**”. The submission focuses on strong regional and inter-regional links, which allows for improved access and mobility both within and between regions and which also recognises current economic activity and highlights opportunities for increased economic growth around regional best practice and market leaders which at this time significantly contribute to national economic growth. These sectors have the potential through economic clusters, centres of excellence in research and development and targeted investment to have a transformative impact on regional development.

Kerry is a diverse county, with important regional towns, significant national, international and global leading companies, a tourism industry of both national and international significance, a landscape of outstanding beauty, rich culture and heritage, major marine potential, coupled with continuing infrastructural and connectivity challenges and a declining and aging population in peripheral areas of the county.



The attached map commissioned by the Southern Regional Assembly highlights the commuting workflow patterns to Dublin and the Regional Cities of Cork, Limerick, Waterford & Galway. It is clear from this analysis that currently County Kerry residents remain largely dependent on economic activity within the county to generate employment opportunities.

Similar analysis undertaken in the preparation of the Local Economic and Community Plan for Kerry highlighted the importance of the Tralee/Killarney Hub extending to Killorglin as the central destination for commuter workflow patterns in the county.

The submission reflects these realities and seeks to identify recommendations that not only apply to Kerry but resonate in many situations along the entire Atlantic Seaboard. The submission is outward looking but is also based on a **strong internal economic core** within the county. This core has a specific focus on the Kerry linked hub towns of Tralee, Killarney and by extension Killorglin forming a knowledge tri-angle as the key economic drivers for the County. In setting out the strengths of the County and its current and potential contribution to regional and national economic development it is considered that imaginative interventions through the National Planning Framework and subsequent policies and investment will allow cohesive regions offer an attractive and

viable alternative to the current unsustainable model where national economic growth is largely dependent on the success of the Dublin region.

Kerry through its geographical location has strong economic, educational, cultural and access links to both Limerick (Mid-West) and Cork (South West), and this has been evident through Kerry's association with Limerick and Cork at various times through regional planning, tourism and economic development bodies. This submission recognises these strong economic and physical links and proposes a strategy of strengthening this combined region by improved linkages, policy changes and focused sectoral investment.

In this regional context the Kerry hub towns and knowledge tri-angle are ideally placed to prioritise and implement the key principles of proper planning and sustainable development through the integration of land-use & transport planning, economic growth and investment. The Kerry hub and knowledge tri-angle offers a sustainable, high quality location for investment, and a quality of life which has a positive sphere of influence over the whole County and beyond the county boundary. The major proportion of 2083 Industry Development Authority and 4,677 Enterprise Ireland supported jobs are located within or close to this hub area. The 1881 Local Enterprise Supported positions while located throughout the county are also strongest in this core region.

It is noted in the ~~Issues~~ and Choices document published by the Department of Housing, Planning, Community and Local Government that the prevention of further over-development and sprawl and achieving effective regional development are key objectives and challenges to be addressed in the National Planning Framework. It is here that Kerry as a County through its peripheral location, its established strengths in industry and natural assets and through its established regional links with Cork & Limerick is ideally situated to offer an opportunity for genuine regional development as an alternative to the continued growth of Dublin.

Kerry's peripheral location is also a significant strength that can be harnessed by the National Planning Framework. Both Tralee, Killarney and by extension Killorglin offer a higher range of functions than similarly sized towns nationally including a third level educational institution infused with local job supported platforms and local industry, public and private hospitals and a strong and vibrant internationally renowned tourism industry. These elements can grow east and energise both the adjacent city regions of Limerick and Cork and indeed the South West region. In addition the Kerry hub has the capacity to continue to grow further, in the context of a strengthened Southern Region and offer an improved standard of living, a quality of life and an environmental sustainability that is positive and attractive to existing and incoming populations and business.

Kerry County Council recognises that for the county to reach its full potential that improved connectivity to and within the wider Southern Region is critical. Improved international and inter-regional access to the region via air, rail, sea and road is a central component of future success. The development of strategic international access into cohesive regions is an economic and logistical imperative in creating strong regional alternatives to a centralised Eastern Region. Equally, only with high quality mobility and connectivity within the region can the Southern Region market itself with the confidence of operating as a cohesive entity and scale of economic activity that can establish it as a true regional counterbalance to the wider Dublin area.

This improved connectivity through physical infrastructure, regional air strategy, intellectual alliances, industry clusters, and the growth of FDI/indigenous industrial partnerships will facilitate the Region in reaching its full potential.

The Kerry Hub and Kerry knowledge tri-angle is ideally placed to function as a designated centre for future growth and investment in this regional context. The key economic drivers of the County will allow the Kerry Hub and Kerry knowledge tri-angle to function as a vibrant entity with a critical mass that can substantially increase over time whilst contributing to the growth of the wider Southern Regional economy.

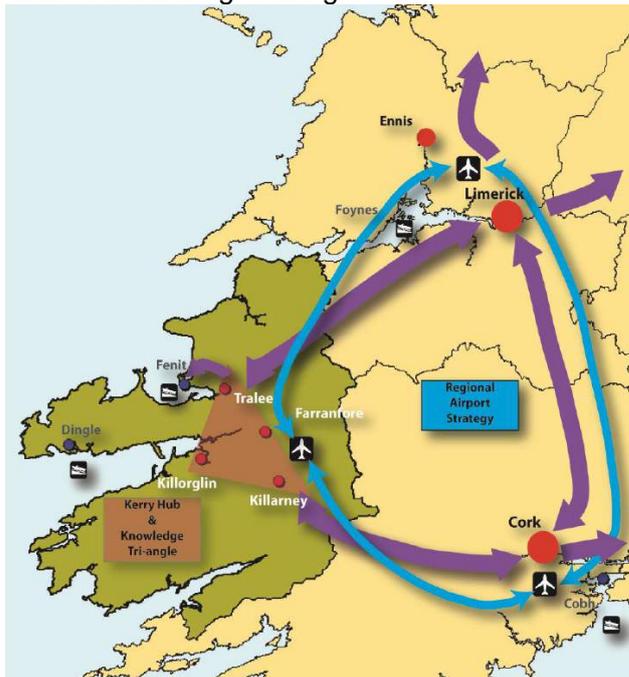


Figure 1 International, Inter-regional & Regional Access Priorities

Support and investment in key priority infrastructure areas identified for development will assist in developing genuine and effective balanced and sustainable regional development, which will be a key objective of the National Planning Framework. The achievement of effective regional development will ultimately be of national benefit.

The attached map (1) identifies the key priority access routes to and within the region. This illustration clearly demonstrates the equal significance of both Cork and Limerick to the regional growth of Kerry. International access, through Shannon and Cork supported by Kerry Airport, the

universities and institutes of technology throughout the region, port access through Cork, Limerick, Foynes and Fenit, the tourism links strengthened around the Wild Atlantic Way and the strategic link to Clare via the Tarbert Ferry are all key regional links to South & Mid-West.

The National Planning Framework should:

- Target the inter-regional international access disparities for both passengers and freight through **significant policy change and investment** in both regional ports and airports.
- Develop the **strategic links** between the major cities and towns in the Southern Region to allow it to function as a cohesive economic region.
- Clearly target the **growth of sectors** that are currently performing well in the regions (Tourism, Fin-tech & Smart Agri in the South West region), leveraging on the exemplary tourism product & existing global leaders in these areas.
- Establish (around these sectors) **centres of excellence of a national and international scale** that will lead to increased economic activity within the regions and enhance Ireland's national reputation as a global leader in research and development.

- Support **population targets** with appropriate capital investment decisions from relevant state agencies including the IDA, TII, and Irish Water.
- Seek to **strengthen large rural towns** like the Kerry hub and knowledge triangle outside the orbit of major cities to counterbalance overdevelopment and sprawl. This will require the setting of real and achievable population targets for these settlements.
- Realise significant benefits through **investment in servicing comparatively more modest priced land offerings** to achieve scalable commercial and residential developments
- Support the **potential of brownfield** sites in major urban areas in order to assist Local Authorities in site assembly and to achieve sustainable development.
- Build on the extensive investments already made in the Kerry Hub towns with respect to road infrastructure, water and waste water.
- Build on the success of the Kerry Technology Park and similar sites through interagency support in acquiring additional lands adjoining the Technology Park.
- Achieve long term **Regional & National Energy security** through the implementation of the Shannon LNG project particularly in regard to the uncertainty in energy supply resulting from BREXIT.

In this regional context the key economic drivers of the county require the recognition of the National Planning Framework, and the associated investment and support over the period of the plan to reach its potential.

These include:

Critical Mass

- The Kerry Hub of Tralee and Killarney has an existing combined population of 77,554 (2016 CSO figures which indicate a 2.4% increase on 2011 census) and with additional support is well positioned to grow its population/labour pool to a critical mass that is attractive to employers. Investment in targeting employment to the HUB area will create a natural increase in economic activity that will grow this critical mass, enhance the associated rural areas and contribute to effective regional development of the Southern Region. The ultimate vision of Tralee reaching its potential as a city (in the context of the HUB area) should be a medium to long term strategy of the NPF.

Strategic Location

- North Kerry's location on the Shannon Estuary presents opportunities for future sustainable economic development and employment growth. The estuary features 500km² of navigable water running from Kerry Head and Loop Head as far as Limerick City, a distance of 100km and it is one of the premier deepwater locations in Europe. The Shannon Integrated Framework Plan (SIFP) [an interagency land and marine based plan for the future development and management of the marine-related industry and tourism along the estuary] has been prepared. The opportunities of the entire Kerry coastline remain largely unexplored and the NPF should identify the Atlantic coastline as an economic opportunity over the coming years.

Connectivity

- Access to markets, through existing sea, rail, air, road networks. The critical linkages within the region between Cork & Limerick and the Kerry Hub require significant investment through the establishment of national corridors from Tralee to Cork/Limerick and the development of motorway access between Cork and Limerick.
- In addition to servicing the export economy of the hub and in particular the export requirements of Liebherr Ltd., Fenit Port offers significant potential for freight export/import for the region. In meeting this need the R558 regional access to Fenit port is a strategic road corridor for the Kerry Hub. Kerry County Council in conjunction with the Department of Transport has committed to improving the road infrastructure to the strategic asset that is Fenit Port. The potential of Dingle port also requires to be examined.
- The strengthening of the rail infrastructure and number of direct access routes to Dublin will contribute to the accessibility of the region both as a business and tourism destination
- The importance of air access to the wider region in the creation of an international, national and regional access corridor through the combined Shannon/Cork/Kerry airports will provide an economic solution to the growth in demand of air access to Ireland, while at the same time removing the current air accessibility imbalance with Dublin enjoying more than 90% of flights to the country.
- 1GBps Broadband available immediately in Tralee, and shortly in Killarney. The continued roll-out of high speed broadband is of local, regional & national importance

Education – Research & Development

- Within the Regional Higher Education Structure with over 60,000 full time students the proposed Munster Technological University will further enhance the higher education and research opportunities in the region.
- Kerry County Council, IT Tralee, Higher education and Industry leaders including Fexco are developing proposals to create a Knowledge Cluster (Centre of Excellence) and Service Design Innovation Hub (I-Hub) between Tralee, Killarney and Killorglin focusing on Research & Development, Innovation and Product Prototyping in the areas of Fin-Tech and Smart-Agri. The I-Hub will develop strategic partnerships of a regional, national and international significance.
- The establishment and growth of out-reach third level research centres in the natural environment offers a regional and national resource and a significant contribution to local economic activity.

Development Potential

- Large landbanks are available for immediate development but in particular:
 - 390 hectares of zoned lands at Tarbert/Ballylongford land bank for marine-related industry. Tarbert/Ballylongford landbank area is considered of major strategic importance for the sustainable development of an industrial/energy hub for the area. This land bank benefits from planning permission for a major liquefied national gas regasification terminal and a combined heat and power plant. These two developments were extensively environmentally assessed and have the potential to

- sustainably create substantial employment both at the construction and operation phases and can act as a catalyst for future industrial development and employment arising from the availability of secure gas and electricity supply in this region.
- Kerry County Council and Institute of Technology Tralee are acquiring ownership of the Kerry Technology Park. This award winning Technology Park has the potential to grow significantly and offer a wide range of property solutions from start-ups to large scale enterprises being facilitated in the Advanced Technology Building currently nearing completion by the IDA. The local ownership of the park will allow for the continuing support, strengthening and improved performance of this major resource. The acquisition of additional lands adjacent to the Park will provide the opportunity for significant future growth in this area.
 - Island of Geese Site in Tralee town, a 2.3 acre key infill and opportunity site in the town centre. Kerry County Council is currently in the process of preparing a master plan for this area. This site has huge potential to contribute positively to the regeneration and vibrancy of the Kerry hub and knowledge triangle.
 - Property solutions in Killarney including the Sara Lee and KTI lands in the ownership of Kerry County Council, and a range of facilities being developed through public/private engagement around the coastal fringe offer additional opportunities for embedding enterprises in the peninsulas in the county.
 - Significant serviced residential zoned lands exist within the Kerry Hub & Knowledge Tri-angle. The development of which can be realised in the short-term.
 - The development potential that exists in coastal and marine aquaculture has a significance for the wider region.

Quality of Life & Place-making

- The Kerry hub and knowledge tri-angle is set within an attractive natural environment consisting of mountains, lakes and sea which offer real benefit in terms of quality of life to future employers and employees. Kerry County Council has committed to and is investing in the protection and enhancement of this environment.
- The development of Greenways within the county as part of a regional Western Greenway Strategy will bring added benefit to the region and significantly impact on tourism in the wider region.
- The cultural richness of the county, its heritage, range of recreational activity and the strength and value of community that exists offers an exceptional quality of life that ensures loyalty to employers within the county.

Cost-Effective Location

- The County offers property solutions, both in commercial office based solutions and in the residential sector that are significantly more affordable than both Dublin and regional cities offerings.
- The regional towns within the Southern Region should utilise this economic advantage to provide property solutions for second base locations for financial and business services in a targeted programme.

Kerry – National/International Player

- The Kerry hub and knowledge tri-angle offers a very strong international tourism product with potential to grow further east into the region in a sustainable way. Within the tourism sector Killarney has a significance in tourism and marketability that is both recognisable in the National and International arena and contributes to wide regional economy.
- Indigenous and Foreign Direct Investment companies within the county are long established and world leaders in their respective fields, Kerry, FEXCO, Dairymaster, LIEBHERR are four Global players that operate within the county.

Infrastructure

- A 30million major investment by Irish Water is currently underway to secure water supply for the towns of Tralee and Killarney. Both towns are served by the Central Regional Water Supply Scheme (CRWSS) which is fed by Lough Guitane, Killarney. The Kerry Central Regional Water Supply Scheme is the largest water supply scheme in County Kerry catering for the water supply requirements of Killarney, Tralee, Castleisland, Castlemaine and an extensive rural area in County Kerry. The upgrade includes a new water treatment plant at Lough Guitane and the doubling of the capacity of the water storage at Lissardboola through the construction of a second 12,500m³ reservoir. The CRWSS design review report indicated that Lough Guitane has the potential to cater for
- The water supply demands associated with anticipated population and economic growth for the region.
- Both Tralee and Killarney Wastewater treatment Plants have capacity to cater for increased population and growth in the industry and employment sector with PE of 42,000 and 52,000 respectively
- Kerry is ideally positioned to promote, develop and facilitate alternative energy uses within the County.
- The extension of the Natural Gas Network presently at Listowel to the Kerry Hub and Knowledge Tri-angle.
- Shannon Gas LNG project for security of supply both at Regional & National Level

2. Regional Critical Mass, Enterprise and Economy

Regional Population and Critical Mass

This submission recognises the requirement to achieve development of critical mass in a regional context in order to attract international investment and to compete effectively in a national and international marketplace.

In Chapter 4, *Infrastructure and Connectivity of the Region*, the infrastructural requirements and investment required to achieve this mass are outlined. The subsequent chapter the *Intellectual and Economic collaboration* that is necessary for a regional offering is explored.

With reference to research carried out to date the Irish Academy of Engineers Report - *The Atlantic City Regions — Development & Connectivity* highlights the population of the gateway cities and the total population within 40 kms of the current designated Gateway Cities. The report states that the concept of an economic corridor is based on the potential of connectivity between urban centres within a country or large region to add value to the economic development of those centres, including the benefits of additional networking between those centres. Given the relatively small scale of Irish regions, the role of connectivity between cities and their catchment areas in supporting regional development is of crucial importance.

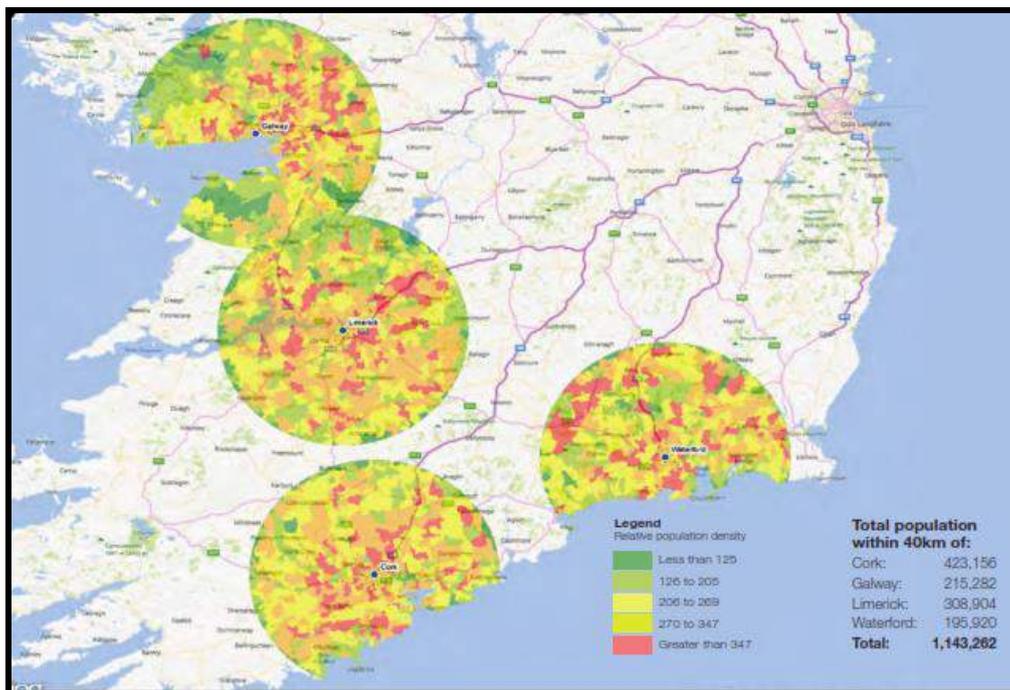


Figure 2: 40km radius of existing gateway cities and population.

This analysis also highlights that there is a significant difference in population and economic scale between Dublin and all other gateway cities and that critical mass may be enhanced by fostering linkages between adjoining regional cities.

While this submission is broadly supportive of the Irish Academy of Engineers Report *"The Atlantic City Regions"* analysis, it is however clearly undermined and deficient by the omission of large swaths of the South West Region, including major exporting global companies and internationally recognised tourist locations. The inclusion of the Kerry hub and knowledge Tri-angle as a designated growth area under the National Planning Frame Work will greatly enhance the critical mass of the South West Region and provide global expertise and international recognition that can only enhance the potential of regional success.

If the Kerry Hub and Knowledge Tri-angle and a 40km zone around the hub are taken into account it would further increase the critical mass for the South West Region. Fig 2 illustrates the inclusion of the Tralee/Killarney hub and the critical mass that can be achieved.

The recognition and development of a strong Southern Region offers the opportunity for more diverse activities and networking opportunities of rural and coastal areas across a number of counties. Strengthening a ring of coastal network towns with designated economic centres that can operate in co-operation and build a reputation in the creative and research sectors throughout the region will have the potential to bring appropriate and scalable economic activity to these remote locations. Work in this area is well underway in the Ludgate centre in Skibereen, the emerging Dingle Creativity and Innovation Hub and the Skellig Research & Innovation Centre.

The Tourism strengths of the Southwest Region and in particular County Kerry has led to investment in tourism infrastructure along the west coast via the Wild Atlantic way. This has created an economic tourism corridor that has internationally highlighted the potential of other centres along the West Coast.

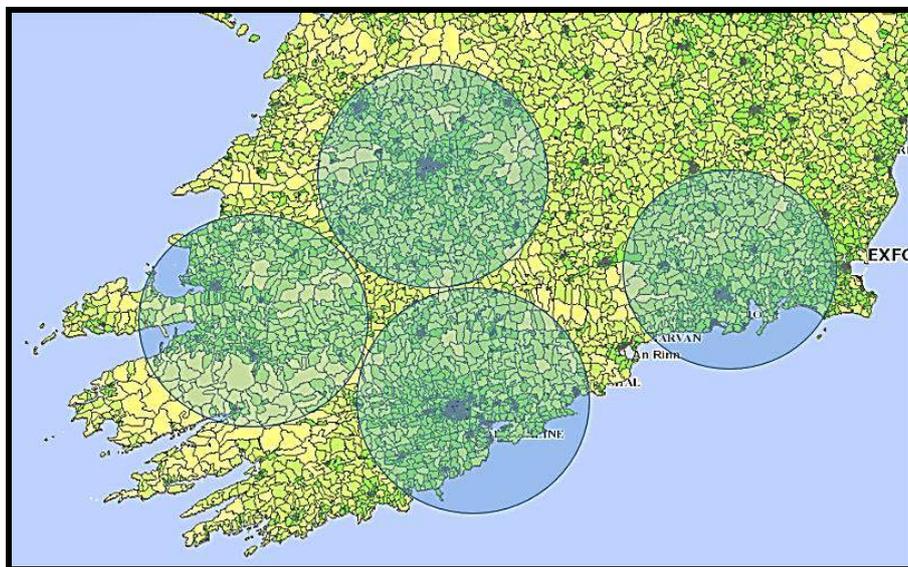


Figure 2: 40km radius of existing gateway cities including the Kerry Hub and Knowledge Tri-angle.

Tourism

The Southern Region and in particular county Kerry has developed a major tourism industry contributing to the national, regional and local economy. Killarney provides a major regional anchor for the industry with extensive tourism accommodation second only to Dublin in the state. The international reputation of the County and its global appeal in respect of place names such as Killarney, Dingle, Skellig, Listowel Writers, Rose of Tralee, Puck Fair and others position the county as a regional and national centre for tourism. This drives a regional economy throughout an extended tourist season and has the potential with growth in business tourism to provide a regional base for a growing conference sector which can influence and positively impact on the wider region.

The county enjoys an international reputation as a tourism destination and tourism is a key economic driver and employer in the County. Tourism provides jobs at all levels and current and projected growth of the sector will further increase employment opportunities. Training and Education and the development of core skills for the sector is vital to provide a workforce to meet the growing employment needs within the sector. Tralee Institute of Technology working with Failte Ireland provide world class sectoral training across a wide range of disciplines in the tourism sector.

Kerry is more dependent on tourism than any other region in Ireland¹

- Earns " 420 million in income from tourists.
- At least 1 in every 5 jobs and businesses in the county depend on tourism.
- Up to 14,000 people are employed in the tourism businesses in the county, including an estimated 9,000 in the accommodation and food services sector.
- Almost 1,500 enterprises in Kerry are engaged in the tourism and hospitality sectors, with almost 1,000 in the accommodation and food services sector. This makes Kerry more dependent on tourism than any other county in Ireland.
- The business potential of tourism is well proven, when even in the depth of the recent recession, tourism start-ups formed a significant part in economic development.

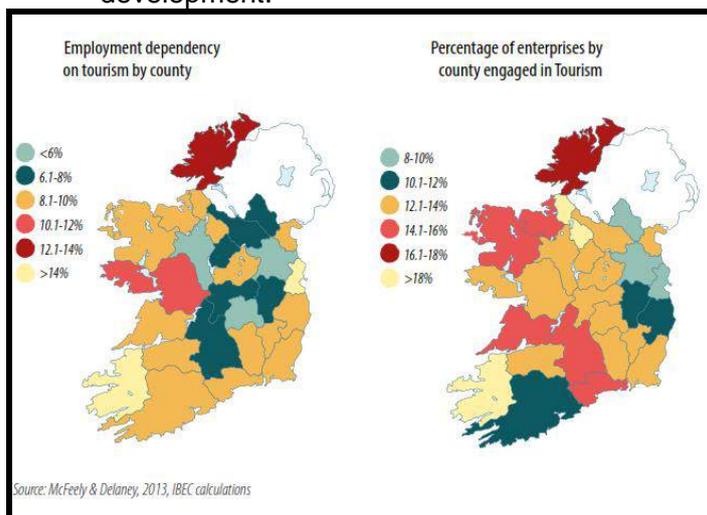


Figure 3: Tourism dependency, percentage of tourism enterprises with Counties.

¹ County Kerry Tourism Strategy and Action Plan 2016-2022

Tourism represents one of the best prospects for employment as the industry is based on the natural attributes of the area and its people, without the need for investment, in major infrastructure. The natural attributes and environment along the Atlantic coast allied to the agri-food and fishing industry constitute a prime appeal for Ireland's visitor target markets and have proven capability to deliver unique visitor experiences.

The strategic priority areas identified in the County Kerry Tourism Strategy 2016-2022 include:

- Protect and Enhance Kerry's natural environment, built, cultural and linguistic heritage
- Ensure the continued success of the Tourism Sector for the County
- Organise relevant regular research to facilitate the development of sustainable, successful new tourism projects, throughout the county
- Provide a world class experience for the visitor
- Lead to further collaboration between state agencies, product providers and local communities
- Embrace new up to date technologies for both the visitor and research purposes.

The Local Economic and Community Plan 2016-2022 focuses on the strengths of the county, and seeks to position Kerry to the forefront in developing the growing skills requirements in the Tourism industry in Catering and Hospitality.

The map below highlights the importance of Co. Kerry in terms of a tourism destination for the South.

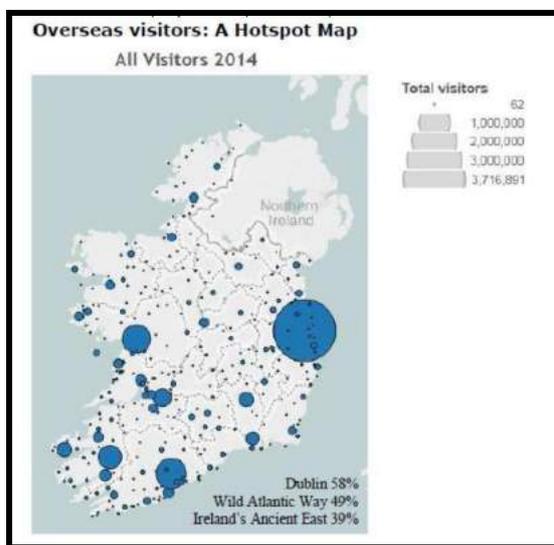


Figure 4: Overseas hotspot map.

County Kerry offers a very strong international tourism product with potential to influence tourism growth throughout the wider region particularly in its importance on the Wild Atlantic Way and Internationally renowned brands in Killarney, Dingle & Skellig and its equally renowned festivals in Listowel Writers Week, Rose of Tralee and Puck Fair.

Kerry Hub and Knowledge Tri-angle – Foreign Direct Investment & Entrepreneurial Success

Building a spirit of enterprise and entrepreneurship in the regional cities and major towns, villages and rural areas will promote new employment opportunities and protect existing jobs.

There is good potential within the region to create competitive environments, which can attract new company start-ups. The Kerry Hub and Knowledge Tri-angle will have increasing levels of population and services making them more attractive locations in which to invest.

The development of the Kerry Hub and Knowledge Tri-angle and its interaction with the adjacent city regions of Limerick and Cork is key to the wider region's development and in particular the economic sustainability of their catchments.

The attraction of Foreign Direct Investment (FDI) companies to regional locations outside the Greater Dublin Area is important to the long-term viability of the regions. It is IDA policy to target a minimum 30% - 40% increase in the number of investments for each region outside Dublin. The plan provides "150 million for an IDA property investment programme to attract FDI into different parts of Ireland over a five-year period, including the development of Utility-Intensive Strategic Sites and related infrastructure provision.

These sites are large specialised greenfield sites which require significant capital investment in utilities (i.e. power, water, waste water, gas, telecoms). These sites meet the particular requirements of large scale capital-intensive projects such as advanced manufacturing in ICT, life sciences and food sectors. The Kerry Hub and Knowledge Tri-angle through the existence of the Kerry Technology Park and its shared ownership between Kerry County Council and IT Tralee is ideally positioned to meet these requirements.

Co. Kerry has consistently produced world class companies which are amongst leaders in their industry sectors. These companies provide inspiration to other entrepreneurs within the County and prove that it is possible to develop and sustain multinational companies in Counties such as Kerry.

Along with many companies acquiring global status, the Kerry Hub and Knowledge Tri-angle has been successful in attracting foreign companies; including Liebherr, Astellas, JRI America, Temmler, Beru, XPX Dollinger and Listel, as well as indigenous success stories such as Kerry Group, Fexco and Dairymaster.

The support and further expansion of these established entities can infuse secondary spin influences eastwards towards Limerick and Cork thereby developing a stronger region.

Enterprise Ireland has over 125 client companies employing 4,677, while there are 12 IDA- Ireland supported companies in Kerry, employing 2083. The Local Enterprise Office acts as a first point of contact for all enterprise information, advice and support needs of the micro business.

Knowledge Economy

The knowledge based industries located with the Kerry Hub and Knowledge Tri-angle are extensive and include computer technology, life sciences, research and development, high-tech manufacturing, communications, business, finance, insurance and other market services. Kerry County Council, IT Tralee and companies such as Fexco and DairyMaster, who are global leaders in the Fin-Tech and Smart Agri disciplines are exploring the potential for targeted growth of these sectors within the Kerry Hub and Knowledge Tri-angle and throughout the wider Southern Region. Developing proposals to create a Knowledge Cluster (Centre of Excellence) between Tralee, Farranfore, Killarney and Killorglin focusing on Research & Development, Innovation and Product Prototyping has the potential to greatly enhance the economic reputation not only of the county but the wider region. This initiative has the potential to develop links with other educational institutions in Limerick and Cork thereby constructing a regionally based knowledge and training cluster.

Agri and Food Sector

With abundant natural resources, intellectual capital and technical capabilities the Kerry Hub and Knowledge Tri-angle has a major competitive advantage and distinct opportunity to position itself as a region of leading capability in global agri-economy. In Kerry alone farming is worth over " 400m to its economy. There are over 2,000 dairy farmers in the county producing 450 million litres of milk which represents approximately 9% of all milk production in Ireland.

Companies such as Kerry Group and Dairy Master are major players within their respective sectors within the Agri-Food and Tech Industries. The proposed development of an Agri Tech Centre of Excellence for R&D and Product development, as well as the existing collaboration between industry and IT Tralee in this sector positions the Kerry Hub and Knowledge Tri-angle as a potential dominant player in the Agri-Tech sector in the future.

Artisan food and drink are recognised as key tourism attractions in their own right. They contribute to a unique place-based visitor experience where visitors can sample local produce and meet local producers. This has enhanced the Kerry Hub and Knowledge Tri-angle's reputation and image both nationally and overseas. Food experiences tend to be indoors and offer solutions to tourists during inclement weather, giving a way of extending the tourist season. Synergies between farming landscapes and heritage, artisan food, rural tourism and the creative economy as well as the marine have been highlighted by CEDRA (Commission for the Economic Development of Rural Areas) and recognised for their complementarities in realising untapped rural economic development potential.

Relationships and interdependence already exist with the region in the Agri and food sector. Kerry Hub and Knowledge Tri-angle's clear strengths in this area offer a real opportunity for these synergies to move east and allow the region to benefit and grow in this sector.

Engineering & Manufacturing

The Engineering and Manufacturing sectors are essential components of local economic activity. The Kerry Hub and Knowledge Tri-angle is fortunate to have several substantial manufacturers such as Liebherr, Astellas, Temmler, Dairymaster and Tricel.

The broader impact of these larger manufacturers is significant and has led to the development and growth of many smaller manufacturing and engineering suppliers who have developed a range of sophisticated skills and technologies to meet the exacting requirements of their main customers. These downstream businesses generate employment in the rural locations and build a manufacturing and design base.

These businesses provide significant additional local activity. This in turn generates support employment in areas such as logistics, transport services, technology development, procurement, skills upgrade and training. Additional employment is in areas such as legal, finance, quality control and accounting services.

The emphasis on quality control has allowed many of these smaller businesses to innovate and develop a range of products targeting other customers in other sectors such as the agri-tech and marine sector.

The export of Liebherr manufactured cranes through Fenit Port has led to continued investment in recent years. Kerry County Council is committed to further investment to improve the R558 road access to Fenit Port. This offers to the Region an excellent point of export and import for goods and an opportunity to increase sustainability to reduce transport distances.

Strategic Integrated Framework Plan for the Shannon Estuary

The Strategy focuses on identified Strategic Development Locations for marine related industry and large scale industrial development. The Shannon Estuary benefits from key attributes that influenced the development of existing large scale industry and the marine industrial base and have the potential to attract further significant investment. These characteristics have led to the emergence of two definable clusters of industry in the Estuary. The first concentrates around Moneypoint /Tarbert/ Ballylongford and is within the sphere of influence of the Kerry Hub and Knowledge Tri-angle. The second is focused around Foynes/Aughinish/Cahiracon and is located a short distance from and under the influence of Limerick. The SIFP offers a significant opportunity to co-operatively attract large scale industry that can drive and energise the South west region. However such efforts will necessitate the co-operation of both Limerick and the Kerry hub and Knowledge Tri-angle, making it essential that all three centres in the south west region are designated in the forthcoming National Planning Framework.

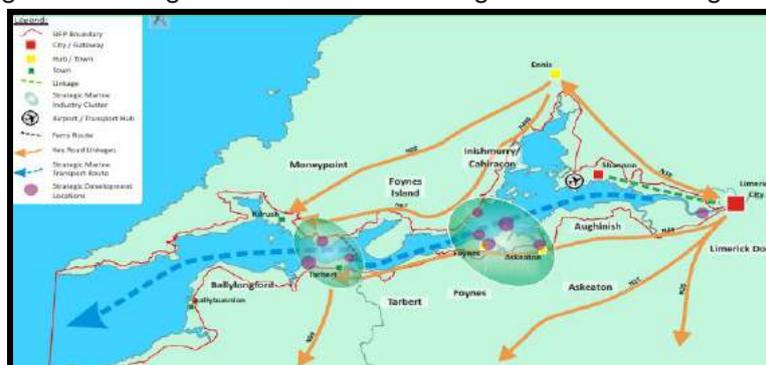


Figure 5: Shannon Integrated Framework Plan - location of clusters

3. Education and Research & Development

The critical role of Education, Research & Development

This submission recognises the importance of critical mass of higher education within the South and Mid West Regions. There are, at present, approximately 60,000 students studying in the South and Mid West Regions across the various Universities and Institutes of Technology. These institutions provide centres of excellence across a range of disciplines which currently produce graduates with highly sought after skills which are of paramount importance in attracting foreign direct investment to regional locations and growing indigenous industry to international levels. The National Planning Framework in influencing education should seek to strengthen established centres of excellence across the regions in the various disciplines. In particular the developed sectors of SMART AGRI and FINTEC within the Kerry hub and knowledge Tri-angle should be strengthened. The bi-location of Industrial/business global success companies with programmes of academic and skills development strengthens both the commercial success of these companies, enhances the global reputation of the region as a centre of excellence in these sectors, produces the necessary skills to allow these companies to flourish and has the potential to attract significant investment and additional companies into the region.

Policies emerging in the broader education areas should be influenced by the National Framework Plan and the Regional Development Strategies that ensue. The Southern Region is ideally poised with its broad third level education structure to implement such strategies.

Institute of Technology Tralee and the Kerry Technology Park.

The shared vision of the IT Tralee (working with other third level institutions), Kerry County Council and existing business entities with the Kerry hub and Knowledge Tri-angle has led to the development of a solid research and development platform. The seamless integration of the business and learning communities has resulted in the development of one of Ireland's most successful business and learning environments. This shared vision has manifested into the development of the Tom Crean Centre, Killarney Technology Innovation Centre, the emerging I-HUB Service Design and Innovation Hub in collaboration with FEXCO and the Skellig Research and Innovation Centre with UCC, the Dingle Creativity and Innovation Hub in association with Maynooth College. This provides a solid base and integrated relationship that can be built upon to further job creation within the Kerry Hub and Knowledge Tri-angle. This base has the potential to grow and energise eastwards towards the existing city regions of Limerick and Cork.

The Kerry Technology Park:

- Provides a vision for Seamless Integration of Education and Enterprise
- Shares 113-acre campus with ITT (Park area 52 acres)
- Implements a Joint KTP/ITT Physical Masterplan and Development Guidelines
- Contains a 26,000 SQ ft. Innovation Works Building providing high quality business space
- Contains a second 24,000 sq. ft. Innovation Works Building

The construction of an advanced technology building at the Kerry Technology Park by the IDA is nearing completion and will offer state of the art facilities for modern business solutions within the park, which for an international client could create up to 300 jobs. The building includes c854m² ancillary office space over two floors and c.1,468m² of high-tech manufacturing space . in line with the current needs of FDI client companies.

The facility has been designed to be capable of 100% expansion to meet future client growth requirements. It has also been designed to achieve LEED CS accreditation in line with IDA's sustainability focus.

The Kerry Hub and Knowledge Tri-angle is fortunate to have a successful and thriving Institute of Technology operating out of 2 campuses in Tralee. IT Tralee has:

- Circa 3,200 students
- Three Schools of Study
 - School of Science, Technology, Engineering & Mathematics
 - School of Health and Social Sciences
 - School of Business, Computing and Humanities
- 330 staff across the academic community, central services and research community
- The Institute is worth " 53m annually to the region
- " 10.2million of research ongoing of which " 8.7m led by IT Tralee

In addition IT Tralee plans to:

- Develop a single integrated campus with all activities on the North Campus - opportunity for a major Capital Development Project for Kerry
- Develop " 15m Sports Academy Project

IT Tralee has developed five dedicated research centres of excellence across the three schools of the institute, including two Enterprise Ireland Technology Gateways:

- Intelligent Mechatronics and RFID (IMaR) Technology Gateway.
- Shannon Applied Biotechnology Centre (Shannon ABC).
- The School of Health and Social Sciences hosts the UNESCO Chair Research..
- The School of Business Computing and Humanities hosts the Centre for Entrepreneurship and Enterprise Development (CEED).
- The Irish Academy of Hospitality and Tourism (IAHT).

The majority of the research conducted at the Institute is collaborative and focused on delivering innovative solutions to industrial partners to promote competitiveness and new job creation.

The development of a Munster Technological University by the integration of Institute of Technology Tralee (ITT) and Cork Institute of Technology (CIT) will provide greater higher education and research opportunities for students across the region. In addition it will allow for greater personal development, research and career opportunities for staff while providing a catalyst for development and growth across the region. The Kerry Technology Park is a unique partnership of education, research, development and employment that supports and drives the wider Kerry Hub and Knowledge Tri-angle.

The development of a Munster Technological University, IT Tralee's relationship with University of Limerick (UL) Technology Transfer Office (TTO) in identifying publicly funded research which has the potential to be commercialised and the combined IT Tralee / Kerry County Council interest in the Kerry Technology park offers an integrated platform that can further the development of a regional research and development cluster sustaining growth in the knowledge based sector.

IT Tralee and Kerry County Council announced early this year that they plan to acquire the Kerry Technology Park. Once acquired, the Kerry Technology Park will be jointly managed by the ITT and Kerry County Council. The facility is home to 17 companies, employing over 300 people. Over the coming years there will be an investment of over " 19m in the capital infrastructure of the ITT / KTP North Campus.



Figure 6: Aerial View of North Campus and Kerry Technology Park

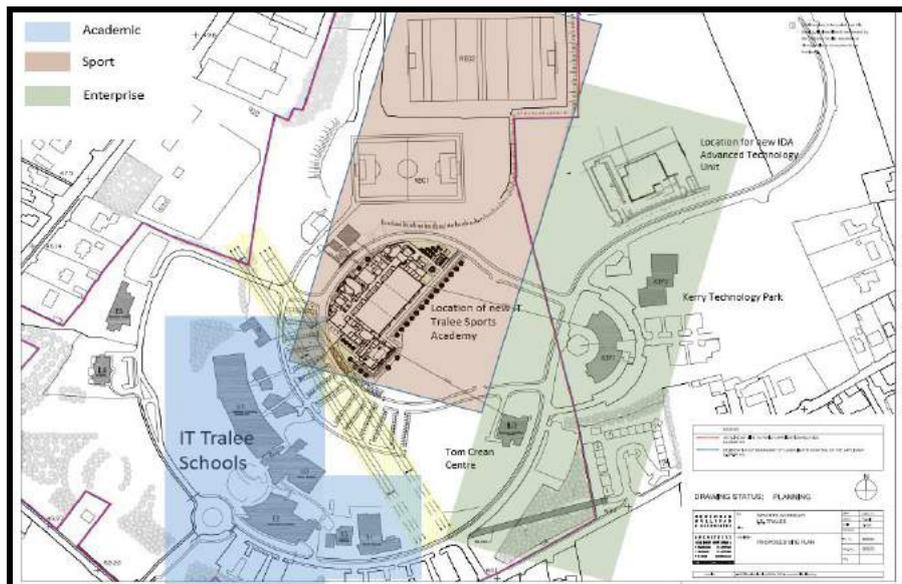


Figure 7: Site layout and Zoning at IT Tralee North Campus and Kerry Technology Park

Tom Crean Centre, Killarney Technology Innovation Centre and iHUB.

Developing an enterprise culture is about providing the right environment for new ideas to grow alongside existing flourishing enterprises. The Tom Crean Centre, Killarney Technology Innovation Centre and the Kerry Technology Park are joint ventures between IT Tralee and Kerry County Council.

Located at the North Campus, the Tom Crean Business Centre provides start-up businesses with an environment to build and scale an international business, combining office space with business support services in an environment rich with a network of entrepreneurs. With a focus on technology and knowledge intensive sectors, the centre offers a supportive environment and incubation facilities to assist innovators and entrepreneurs in taking their ideas from concept to full commercial success. The Tom Crean Centre is also home to New Frontiers participants, the Enterprise Ireland funded entrepreneur development programme delivered by the Institutes of Technology.

The Killarney Technology Innovation Centre is a purpose-built enterprise incubation and business innovation complex. KTI offers a range of office suites and serviced desk spaces to new and expanding businesses. The Centre is an ideal business start-up location for knowledge-intensive enterprises. Client businesses will typically operate in such areas as e-commerce, software, multi-media, tourism, web and knowledge-based sectors.

The Centre provides a range of different sized business incubation units. These units are fully serviced and provide an ideal location for technology driven enterprises and innovative R&D projects.

KTI also provides enterprise-related project development, project management and research services to public and private organisations.

These shared campuses have become a national role model and the interchange of ideas, skills, knowledge and energy among students, researchers, lecturers and entrepreneurs is key to the success of the campus as a whole. In recognition of County Kerry's quality, efficacy and long-term success of its entrepreneurial vision it was awarded the prestigious title of European Entrepreneurial Region of the Year in 2011. Recognising the important role which enterprise and the community play in promoting both societal and economic progress within the region, the Institute will maintain a focus on these areas with the understanding that mutual exchange and collaboration will in turn benefit academic teaching, research and the learning experience. The Institute has built upon its reputation and profile by actively promoting its role as a major source of expertise in the South West.

4. Infrastructure & Connectivity of the Region

Introduction

Kerry County Council recognises that for the county to reach its full potential that improved connectivity to and within the wider Southern Region is critical. Improved access to the region via air, rail, sea and road is a central component of future success. Equally, only with high quality mobility and connectivity within the region can the Southern Region market itself with the confidence of operating as a cohesive entity and scale of economic activity that can establish it as a true regional counterbalance to the wider Dublin area.

Investment in infrastructure in Kerry in order to provide improved linkages to the major cities and beyond will not only improve connectivity in and out of the County and Southwest Region but will, ultimately, improve the attractiveness of the Hub and the wider region for future investment. Support and investment in key priority infrastructure/areas identified for development will assist in developing genuine and effective balanced and sustainable regional development, which will be a key objective of the National Planning Framework. The achievement of effective regional development will ultimately be of national benefit.

Inter-regional Access Disparities, Air and Sea

Currently the eastern region dominates international access into the Country both from air and sea. This is true both for the importation and exportation of freight and also visitors to and from the country. Dublin airport accounts for 90% of flights into and out of the country, which has significant impact on its attractiveness as a business location for international companies. An increased regional balance in international air traffic would enhance the economic attractiveness of the regions and lead to more balanced regional development.

In this context a regional air strategy between Cork, Shannon and Kerry airports working in collaboration would be a vehicle to provide this alternative international access. The NPF operating at the highest level of planning policy in the country should influence the direction of future international access growth to the country. Singularly this would have the greatest impact on effective regional development in internationally accessible locations. All three airports in the Southern Region have untapped potential for growth and within a structured agreement could provide the necessary international access that would make the Region more attractive for international investment.

In this Regional context Kerry Airport (Farranfore) can play a significant if supporting role to the two major regional airports, building on the major Tourism influx into the Region and the global leading companies within the county. During 2016 over 325,000 passengers travelled through Kerry Airport, an increase of 6 per cent on 2015. As part of the Functional Area plan for the Hub a local area plan has been prepared to ensure that Farranfore develops its potential as a transport hub and as a sustainable location for logistics and distribution. Land is zoned for airport related uses, industry, light industry, warehouse/distribution and a commercial business park.

Gross and operating profit was also up at the airport in Farranfore which has regular connections to Germany, Frankfurt-Hahn, London-Stansted and London-Luton, as well as summer connections to Alicante in Spain and Faro in Portugal. The most recent route acquisition is the Kerry Berlin route. All are operated by Ryanair. The subsidised daily regional connection, in place until 2018, the PSO Kerry to Dublin route, operated by Aer Lingus Regional, saw passenger numbers increase by 20 per cent, and the passenger load factor on the route go up from 56 per cent to 67 per cent. The Kerry Hub and Knowledge Tri-angle has justified through this increase in patronage the retention of this service, which is viewed as vital for international investment.

The development of the Southern Regions ports at Cork, Limerick, Foynes, Fenit and other significant coastal ports including Dingle, provide important logistical access to the Region. The importance of these ports will increase substantially as the implications of BREXIT emerge and the land-bridge connection to continental Europe becomes more problematic.

The Shannon Foynes Port specialises in bulk cargoes, liquid fuels and chemicals, ores, coal and other energy products, agri-business inputs such as animal feedstuffs and fertilisers, heavy machinery and wind turbines.

Fenit Port is, a fully compliant ISPS port, offering warehousing and open storage options for commercial clients. A 175m long deep sea pier and an all-terrain mobile crane (80 tonnes) are available on site. Fenit Port regularly accommodates 15,000 tonne ships. This port is of strategic importance to the county and one of the Regions largest and longest serving companies Liebherr is dependent on it.

The Kerry County Development plan 2015-2021 sets out plans for significant upgrade and reorganisation of the future Tralee road network, the features of which are also essential to the Tralee Transport Strategy. Building upon the Tralee Eastern by-pass these significant projects include: the N22 Tralee Bypass, the Tralee Western Ring Road, the Tralee Northern Ring and upgrades to the R558 serving Fenit Port.

With the development of these routes road access to Fenit will be improved. The development of the road infrastructure linking the Port at Fenit to the Kerry Hub and Knowledge Tri-angle will create an economic corridor which will act as a catalyst for the future development of the Port. Used as an export facility by Liebherr (Ireland) Ltd., the port offers a strategically important import and export route for goods and services complimenting existing regional facilities at Foynes, Limerick and Cork. The expansion of regional ports including Fenit, Dingle, Foynes and Cork offers a counter balance for the country that can be harnessed through appropriate investment.

Inter-regional access disparities, Road and Rail

A study was carried out in 2012 by the NRA (now TII) regarding the impact of Road Improvements on accessibility and in turn economic potential of Counties, Urban areas, gateways and Hubs. According to the report the interest in accessibility measures has increased because of their relevance to measuring the wider economic benefits of transport investments.

Firms that locate in dense urban areas provide spill-over benefits to other firms in their locality.

The result is that firms in dense urban areas have higher productivity and lower costs than those in more rural settings, other things being equal. The scale of a firm's locality is in part determined by accessibility.

If transport system improvements bring geographic areas closer together through accessibility enhancements, then the effective density of that area is raised. Thus, economic productivity gains can be realised through transport system improvements that raise effective density.

County Kerry rated poorly in terms of access to employment. Access to employment for Dublin City zones is five times that of Kerry, which is the least accessible local authority area.

A reason for the poor results is that one of the greatest difficulties faced by County Kerry is its peripherality.

The provision of proper external infrastructural linkages from the Kerry Hub and Knowledge Tri-angle to Limerick and Cork minimises the impact of peripherality for all growth centres in the region. The development of improved *within region route corridors* linking all three growth centres will provide more attractive locations for the development of industry and as locations in which to live and work.

The key corridors imperative to linking the three proposed growth centres include:

- The N21/N69 national road from Tralee to Limerick
- The N22 Cork to Kerry via Macroom and Ballyvourney
- Proposed M20 with a link to the Kerry Hub and Knowledge Tri-angle.

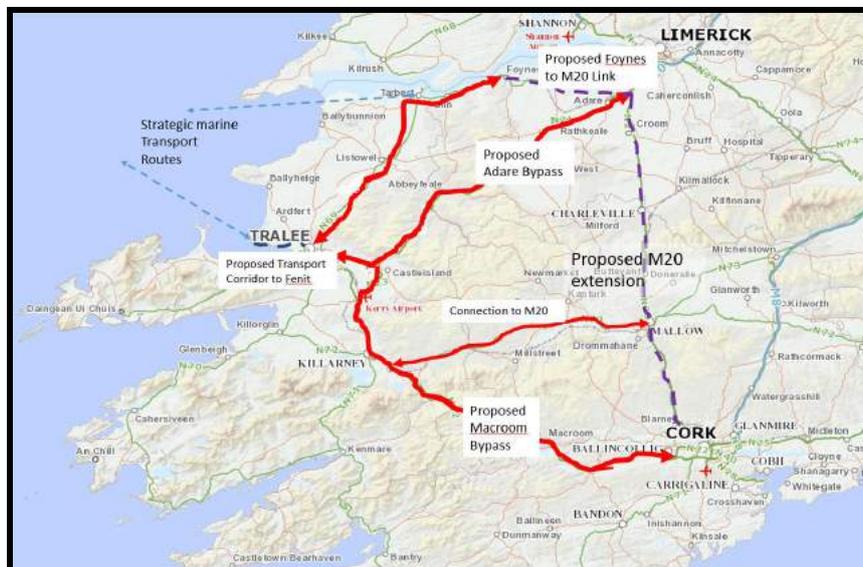


Figure 8: Road Connectivity to and from the Kerry Hub and Knowledge Tri-angle



Figure 9: Existing road and rail infrastructure serving the Kerry Hub and Knowledge Triangle

To maximise the potential of Limerick, Cork and the Kerry hub and Knowledge Tri-angle collectively, two projects announced in the 2015 *'Building on Recovery: Infrastructure and Capital Investment 2016-2021.'* are crucial. They are:

- Adare Bypass N69 (Phase 1) and Foynes Port Access Road which will connect the N7 Dublin motorway and the Limerick/Shannon region to the N21 and the South West.
- The N22 project linking Ballincollig to the west of Cork City to the N22 west of Ballyourney. This will bypass Macroom and connect the N25 from Rosslare/Waterford and the N8 to the South West.

The important economic corridor linking the two major centres of Tralee and Killarney requires significant investment to allow these centres reach their full potential and to operate in a cohesive manner with complementary functions and service provision. As previously outlined the improvement of the link from Fenit Port to the Tralee/Killarney Hub is critical to existing exporting firms in the region.

The Dublin-Mallow-Tralee railway routes are a vital connection between the Kerry Hub and Knowledge Tri-angle and the Gateways of Dublin and Cork and provide connectivity for the people of Kerry and tourist visiting the County.

According to the National Transport Rail Review report 2016, The Dublin-Tralee route shows patronage that is relatively strong when compared to their catchment populations. The Dublin -Killarney/Tralee Route was also identified as a key tourism transport route. The Tralee Route came across positive in the report and scored well on Profit & loss analysis for each route.

However, journey time between Mallow and Tralee remains excessive. It is essential that unmanned crossings along the Mallow to Tralee Section of the regional rail network are eliminated, thereby allowing significant shorter rail journey times linking the Kerry Hub and Knowledge Tri-angle to Limerick, Cork and the East.

Broadband

In 2012 the Department of Communications, Energy and Natural Resources (DCENR) published 'Delivering a Connected Society'. A National Broadband Plan for Ireland which recognises the importance of high speed broadband for economic development and which sets out the strategy to deliver high speed broadband throughout Ireland. The strategy identifies high speed broadband as a 'key enabling infrastructure' with 9 out of 10 SMEs identifying the internet as having a positive influence on their company in terms of better communications, time savings, productivity gains and increased sales. SIRO have completed the installation of 1GBps Broadband in Tralee Town Centre, and will shortly begin the installation of 1GBps in Killarney.

In conjunction with the FIN-TECH centres in Killorglin, the Information Technology sector has huge potential for employment within the Kerry Hub and Knowledge Tri-angle. Broadband enables distance for secondary spin off industries to become minimised, rendered the development of this sector emanating from the Kerry hub and Knowledge tri-angle a significant opportunity for regional growth particularly in Limerick and Cork.

Tourism & Wild Atlantic Way

Tourism contributes in a significant way to the Southern Region and in particular benefits areas of the Region that have few other economic drivers currently. The Wild Atlantic Way has been a huge marketing success, but this success for it to be sustainable requires capital investment in facilities, access routes, public amenities and other high quality tourism infrastructure.

The region has developed a number of key tourism strategies through their respective counties and these have set short, medium and long term goals and detailed actions to maximise the benefits of the industry within the region. The emerging NPF should highlight the benefits of this industry and investment for effective Regional Development.

Recommendations

Critical Mass	<ul style="list-style-type: none"> • Target population growth in Regional Cities and Towns supported by the necessary Investment and Job-creation • Outline the role of Regional Towns of significant size outside the direct influence of Regional Cities and plan for their growth with sustainable population targets (50,000) (Tralee, Killarney)
Connectivity	<ul style="list-style-type: none"> • Target Inter-Regional air and sea access disparities through significant policy change and investment (Southern Airport Strategy) • The N21/N69 national road from Tralee to Limerick. • The N22 Cork to Kerry via Macroom and Ballyvourney. • Proposed M20 with a link to the Kerry Hub and Knowledge Triangle. • Improved connectivity to facilitate the growth of tourist traffic in the region and in particular along the Wild Atlantic Way • Economic development of Fenit Port. • Continued investment in Killarney-Tralee-Fenit route corridor. • Shortened rail Journey times and increased frequency on the Tralee-Dublin route. • Roll out of Broadband 1GBs to the Region. • Future proofed broadband speeds of 5GBs.
Infrastructure	<ul style="list-style-type: none"> • Implementation of Water Ireland 25 year Capital Strategy. • Implementation of IT Tralee Capital investment programme. • Serviced land for increased population targets in regional towns • Targeted investment in Town Centre Brownfield sites
Economic Generation & Employment	<ul style="list-style-type: none"> • The development of the Ballylongford Landbank. • The completion of the IDA advanced manufacturing facility at Kerry Technology Park. • The construction of a second live building to attract FIN-TECH service providers at Kerry Technology Park. • Investment in centres of excellence of research and innovation targeting the existing global leading companies in the area • Link a network of coastal towns through innovation and creativity hubs through Cork, Kerry and along the Western Seaboard
Tourism	<ul style="list-style-type: none"> • The development of tourism infrastructure in the coastal towns along the Wild Atlantic Way. • The strengthening of the existing built tourism infrastructure in the region, including museums, heritage centres and iconic attractions • Support the development of business tourism in the region • Development of South Kerry Greenway Project, the North Kerry Greenway incorporating Tralee/Fenit and Listowel County Bounds

Growth of existing sectors	Targeted Regional Investment in proven sectors in the region <ul style="list-style-type: none"> Financial Services (inc Fin-Tech) Smart-Agri, Tourism, Food, Marine, Export driven manufacturing
Energy	The attraction of international development partnerships to strategically identified sites in the SIFP including: <ul style="list-style-type: none"> Tarbert/Ballylongford Development of Shannon LNG Project for security of supply at National and Regional level Extension of Natural Gas Network Sustainable Renewable Energy Investment (Bio-mass)
Building Economic Reputation of the County	<ul style="list-style-type: none"> Development of Centres of Excellence within the region in research and innovation linking global leading companies with higher education

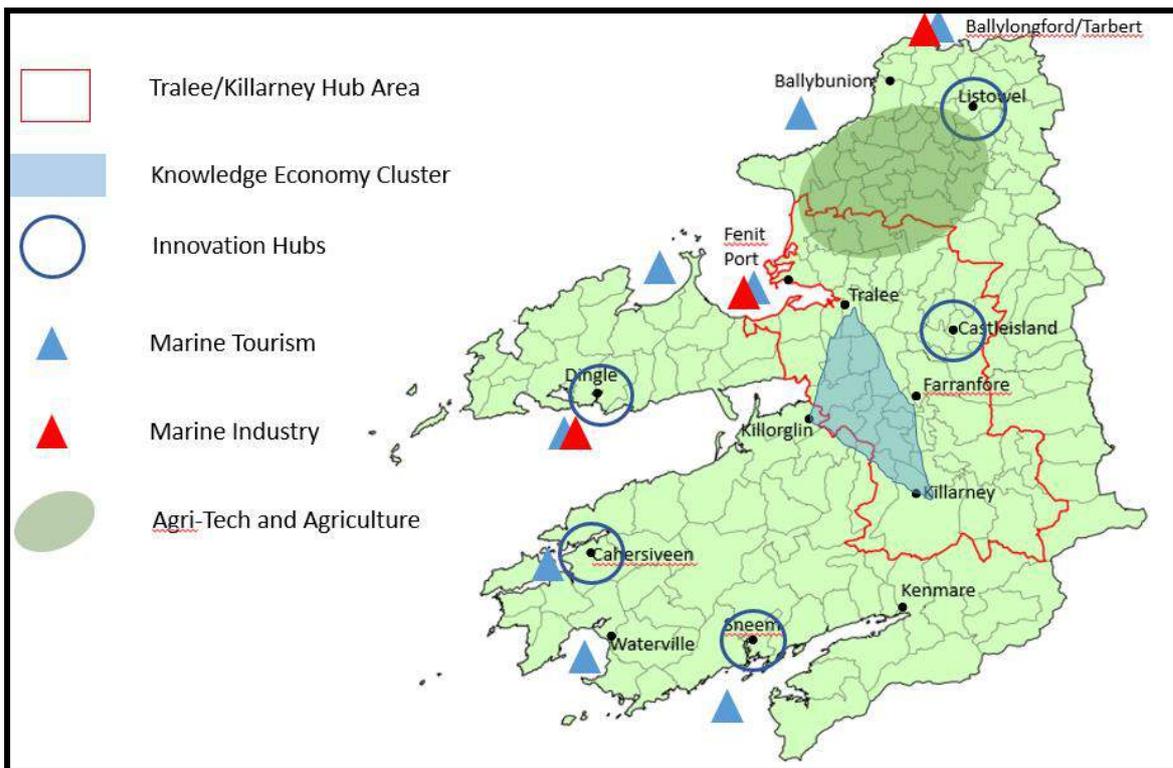


Figure 10: Economic Drivers

Figure 10 highlights the strong economic drivers within the County that need to be sustained and developed to support the Kerry Economy and also strengthen its strategic importance to the wider Southern Region.