



Shannon International Airport in 'Open Skies' Mid-West Tourism & Economic Development Plan

JUNE 2006

PREPARED BY THE MID-WEST REGIONAL AUTHORITY



IN PARTNERSHIP WITH:



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Executive Summary

This plan sets out the priorities for a sustainable Shannon International Airport following the proposal from Minister for Transport, Mr. Martin Cullen, to prepare a Tourism and Economic Plan in consultation with his colleagues Minister for Arts, Sport & Tourism, Mr. John O'Donoghue and Minister for Enterprise Trade & Employment, Mr. Michéal Martin, to ensure that the airport sustains and grows transatlantic air services in the event of the EU-US 'Open Skies' agreement.

Shannon International Airport has a number of positive attributes that gives it an important competitive advantage over other airports, for example: its convenient location in the Mid-West of Ireland, its international connectivity, user-friendly environment, pre-clearance facilities for transatlantic passengers, etc, all of which will be explained further throughout the plan.

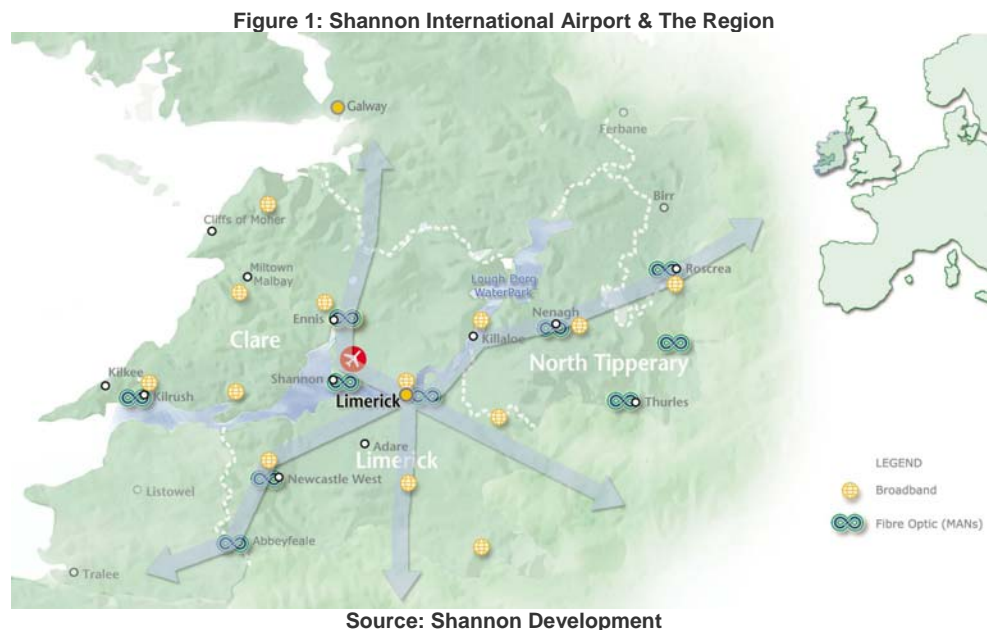
SUMMARY OF KEY RECOMMENDATIONS

Shannon International Airport is a key driver for economic, tourism and industrial development for the Western Region of Ireland. The Mid-West Tourism and Economic Development plan proposes the following actions for implementation to ensure the continued viability of Shannon International Airport in the light of the introduction of the EU-US 'Open Skies' agreement:

- The Regions critical **Infrastructure** requirements need to be accelerated to ensure that Shannon International Airport's catchment area is expanded creating a vibrant market demand for air services especially for transatlantic services. This Plan in particular stresses the importance of the Road Networks such as the N18 Galway-Limerick Dual Carriageway to be advanced as a matter of urgency.
- A **5-year action plan** needs to be implemented immediately supporting Shannon International Airport in achieving a successful outcome to the introduction of 'Open Skies'. This 5-year action plan wishes to achieve the following:
 - An independent and financially viable Shannon International Airport.
 - Tourism Promotional Fund of €44m to be provided by exchequer funds and to be administered by relevant Tourism Agencies (*avg. €8.8m per annum*).
 - Route Support Fund of €9m for existing and new services to be provided from exchequer funds (*avg. €1.8m per annum*).
- A Regional **Tourism Innovation Programme** must be a key element of the new approach to tourism product development. There will be a continuing need to implement more innovative approaches to developing and marketing the tourism sector in the years ahead and a structured approach to promoting innovation will be essential.
- An international standard **Regional Conference Centre** located near Shannon International Airport is a key priority for the tourism sector in the medium term and would attract high yielding visitors to the Western Regions on a year-round basis.
- The **Roles and Responsibilities** of the economic development agencies in the Shannon region, IDA Ireland, Enterprise Ireland, and Shannon Development, must be clearly defined so that the region can leverage maximum advantage from their expertise and record of accomplishment.
- An **Enterprise Strategy** will be developed for the region. This strategy must address all areas of business sector and enterprise activity to include foreign direct investment, indigenous enterprise, services, manufacturing and small and medium businesses.
- An **Implementation Group** needs to be set-up comprising National, Regional and Local representation from Public and Private sector with an 'Open Skies' **Impact Review** incorporated to monitor and evaluate the implementation of the proposals outlined herein.
- The target for Shannon International Airport is to secure a **30% share of the direct transatlantic market** between North America and Ireland and to achieve an appropriate sustainable level of year-round services to main US gateways.
- An **extension to the US Custom and Border Protection** facility at Shannon International Airport to provide full Customs and Agriculture pre-clearance will provide an innovative and unique opportunity for the airport to considerably grow its transatlantic market. This Plan recommends that a full-clearance pilot programme be implemented before the end of 2007.

Under the terms of the current Ireland/US Air Bilateral Agreement, each US and Irish airline providing scheduled services between the US and Shannon can also provide direct scheduled non-stop services between the US and Dublin, provided that an equal number of non-stop services operates in both gateways on a twelve-month basis. A full Ireland-US “Open Skies” regime will commence from the Spring of 2008. This policy change presents a number of challenges and opportunities for the airport and surrounding areas from a tourism, industrial and economic point of view.

The Limerick/Shannon Gateway has experienced considerable growth and development over the last 20 years particularly in terms of business, industry, tourism, retail, professional and international services. The presence of Shannon International Airport, Shannon Foynes port and educational institutions such as the University of Limerick and Limerick Institute of Technology ensure that Limerick is the economic hub of the Mid-West region. The future development of Limerick/Shannon in terms of business, education, social inclusion and quality of life is of national strategic importance, as Ireland will only achieve its full potential when all regions of Ireland can contribute fully to the economic, social and cultural strength of the nation.



One of the core objectives of the current National Development Plan (NDP) 2000-2006 was an improved regional spread of economic activity within Ireland. It describes the Government’s objective for regional policy as “to achieve more balanced regional development in order to reduce the disparities between and within the two Regions (S&E/BMW Regions) and to develop the potential of both to contribute to the greatest possible extent to the continuing prosperity of the country”. Since its foundation in the 1930s Shannon International Airport has become an engine for development of the west of Ireland and has the potential to play an even greater role in helping to create more balanced regional development in Ireland in the context of the implementation of the National Spatial Strategy (NSS) 2002 – 2020. The NSS identifies Gateway locations as drivers of national and regional growth and in particular identifies Shannon International Airport as the engine for growth in the Limerick/Shannon Gateway.

The Tourism and Economic Development Plan outlines a number of recommendations to manage and counteract the impact the ‘Open Skies’ agreement will have on Shannon International Airport and the West of Ireland. The plan identifies four key priority areas for action: (see Figure 2)

1. Shannon International Airport
2. Infrastructure
3. Tourism
4. Enterprise Development

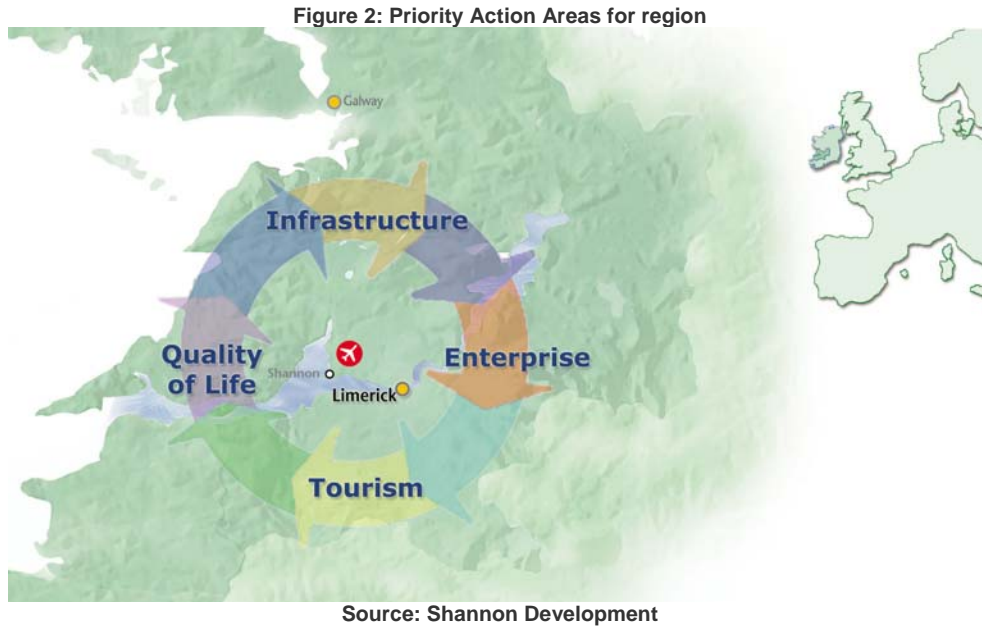


Figure 2 highlights the key interlinking components required to strengthen Shannon International Airport as an engine for balanced regional development. The importance of a world-class infrastructure network, tourism and enterprise are all critical components for the viability of Shannon International Airport and the quality of life for the surrounding population and industry.

Shannon International Airport

The Mid-West Regional Planning Guidelines, adopted by the Mid-West Regional Authority in May 2004, identifies Shannon International Airport as being a central feature of the area's transport infrastructure. The airport provides access to several international centres in Europe and North America and is a critical constituent of the economic potential of western Ireland. The recent Gateway Investment Priority Study, commissioned by the Department for Environment, Heritage and Local Government identifies Shannon International Airport as Ireland's second largest airport and provides international access to the region, including from the US, and is the key feature of the area's transport infrastructure. Passenger numbers in 2005 were over 3 million, up 35% on 2004.

Shannon International Airport is critical to the tourism and economic progress of the Mid-West region and greater West of Ireland. The opportunities and threats of 'Open Skies' have been evaluated in the independent study carried out recently by Sorensen & Dukes commissioned by the Chambers of Commerce of Ireland¹. This report highlights the threats that Shannon International Airport is likely to encounter because of 'Open Skies' while emphasising the benefits for Aer Lingus and Dublin Airport.

¹ EU/US Air Transport Agreement – Potential Impact on Ireland, Sorensen & Dukes. Commissioned by Chambers of Commerce of Ireland, Air Transport Users Council

The value of direct Transatlantic business in 2005 to Shannon International Airport was €25m in revenue terms. A further €3m in revenue was generated by commercial transatlantic passengers going through Shannon to / from Dublin. Furthermore, revenue spend in the region by North American visitors was €278m. Transatlantic year-round services underpin the Regional US industrial investment of over €35bn in the West of Ireland.

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The target for Shannon International Airport is to secure a 30% share of the direct transatlantic market between North America and Ireland and to achieve an appropriate sustainable level of year-round services to main US gateways.

This plan therefore outlines recommendations to be implemented as a matter of urgency to maintain, strengthen and grow Shannon International Airport and thereby contributing to further tourism and economic growth in the West of Ireland.

Infrastructure

A good quality and efficient infrastructure network to and from Shannon International Airport is essential to the competitiveness of the airport and the greater Shannon region. This single most important requirement is completion of the N18 Limerick-Galway Dual Carriageway. The completion of this infrastructure project will not only expand considerably the catchment area of Shannon International Airport by reducing travel times but is of broader importance in supporting industry and tourism in the region and will be a catalyst for economic growth in the entire West of Ireland.

Section 2 of the Plan outlines the key infrastructural upgrades required to sustain Shannon International Airport's position in the light of 'Open Skies' and it is recommended that these projects are accelerated to coincide with 'Open Skies' full implementation in 2008. The critical infrastructure needs are identified under the headings Roads, Rail Network, Bus Network, Information Technology, Urban Renewal, Energy and Water Services.

Tourism

Tourism in the entire West of Ireland is a major beneficiary of direct scheduled services from Shannon International Airport to North America, the UK and Europe. Shannon International Airport enjoys a mutually beneficial relationship with the sector in that the vast majority of passengers are leisure and tourism travellers. The consensus of key stakeholders in the region is that the introduction of 'Open Skies' will result in additional transatlantic visitors to Ireland but could lead to a reduction in transatlantic traffic to Shannon particularly over the short to medium term. In this regard Section 3 outlines the importance of tourism to the region and specifies a number of key measures to be implemented to counteract any negative effects of 'Open Skies'.

Increasing funding for Tourism Promotion, €44 million over 5 years, is required to assist Shannon International Airport to meet the challenge and exploit the opportunities of 'Open Skies'. As it is the direct services to Shannon which are of such high value to the tourism interests of the West of Ireland, it is essential that the Tourism Promotional Fund be directed primarily at the North American market as currently serviced by Aer Lingus and number of US and Canadian airlines, utilising a number of hubs and gateways in both countries.

Enterprise Development

National and international access and connectivity is a critical component of a region's business competitiveness. Shannon International Airport is a major underlying reason for the development of the strong industrial base of the Mid-West region. A recent report by IBEC² Mid-West and Ennis and Shannon Chambers of Commerce found that the business community in the Mid-West firmly believes Shannon International Airport has contributed to the region's development and that Ireland-US 'Open Skies' will have implications for the business community and the tourism sector of the greater west of Ireland region.

A Regional Enterprise Strategy with a strong focus on the twin aims of fostering indigenous business and attracting foreign direct investment must be developed. This will address the region's value proposition that will make business successful in this region. The Enterprise Strategy will be a platform for economic progress in this region thereby creating a virtuous cycle of growth and development that fosters employment, development of R&D and technology expertise and a vibrant year-round business market for Shannon International Airport.

The introduction of EU-US 'Open Skies' provides an important backdrop in developing an Enterprise Strategy for the region particularly if services and connectivity to the US and Canada are affected over the medium term. The National Development Plan 2007-2013 will set the context for enterprise development in the regions by outlining plans for infrastructure development and supports available for enterprise at national level over its term. The Enterprise Strategy for the region will be a practical guide to assist in the implementation of national policy at regional level.

² IBEC – Irish Business and Employers Confederation

Introduction

This plan sets out the tourism and economic development priorities over the next five years for Shannon International Airport within the context of the introduction of EU-US 'Open Skies'.

Background

The preparation of this plan is as a result of a number of announcements made by the Minister for Transport, Mr. Martin Cullen, T.D. in 2005 regarding his intention to develop a Tourism and Economic Development Plan for Shannon following the negotiation of an agreement for Shannon International Airport in the context of the proposed EU/US 'Open Skies' agreement. Following this announcement and consultation with the Minister a working group was established under the auspices of the Mid-West Regional Authority, whose aim was to prepare and bring this Tourism and Economic Development plan to fruition as an input to the Minister's Plan.

The Ireland/US Air Bilateral Agreement, first negotiated in 1945, governed that every transatlantic service entering Irish air space was obliged to stop in Shannon. The Dual Gateway Policy was introduced in 1993 where Shannon and Dublin were introduced as Ireland's transatlantic airports. The agreement governs that each US and Irish airline providing scheduled services between the US and Shannon can also provide direct scheduled non-stop services between the US and Dublin, on the basis that an equal number of non-stop services operated in both gateways on any twelve-month period. This one-for-one ratio is to be changed from November 2006, allowing any airline to serve any Irish airport from any point in the US from April 2008. (See Appendix A for the current position on EU-US 'Open Skies')

The impending introduction of 'Open Skies' in 2008 could lead to a reduction of 30 per cent in passenger numbers on transatlantic routes into Shannon International Airport with serious adverse consequences for industry, tourism and employment in the Mid-West and West regions. This Plan sets out a number of key recommendations how Shannon and the Western Regions of Ireland can maximise the benefits and limit the potential risks that could occur.

Regional Implementation

In light of the 'Open Skies' agreement and the possible negative effects for Shannon International Airport a number of existing working groups identified recommendations/actions to manage and counteract the impact this agreement will have on Shannon International Airport and the West of Ireland. These include:

1. Shannon Airport Authority
The Shannon Airport Authority Action Plan highlights the implications for Shannon International Airport of a fully liberalized transatlantic market and the need for a 5 year action plan for route support and tourism promotion to sustain the future of the airport. (See Section 1)
2. Critical Infrastructure Requirements
In cooperation with the Tourism and Economic Development Plan Working Group, the Local Authorities in the region, led by Clare County Council, identified the critical infrastructural needs for Shannon International Airport's catchment area under the headings Roads, Rail Network, Bus Network, Information Technology, Urban Renewal, Energy and Water Services. (See Section 2)
3. Western Regions Tourism Initiative
Comprising the key stakeholders in the West tourism industry, this working group argues that it is imperative that a strong and sustained marketing campaign is launched in the

key international source markets coupled with a focused programme of innovation and development for the visitor experience. (See Section 3)

4. Potential Impact on Industry

IBEC Mid-West in conjunction with Ennis Chamber and Shannon Chamber of Commerce published in March 2006, 'Embracing the challenges and opportunities of Ireland-US Open Skies', following a survey of members in Galway, Clare, North Tipperary and Clare undertaken in December 2005. This report highlighted the critical importance of retaining and building on the level of transatlantic services from Shannon International Airport. (See Section 4)

The Mid-West Tourism and Economic Development plan sees itself as the overarching document of all of these findings and is consistent with the policies contained within the NDP, NSS, the Mid-West and West Regional Planning Guidelines/Economic Strategies and the Gateway Investment Priority Study. The Plan also takes into consideration the on going workings of such groups as the Atlantic Gateway and Atlantic Way Movement.

The aim of this Tourism and Economic Development plan for Shannon International Airport within the context of the introduction of 'Open Skies' is for endorsement and approval by Ministers for Transport, Arts, Sport & Tourism and Enterprise Trade & Employment. The recommendations contained therein are proposed for inclusion in the next National Development Plan 2007-2013 and subsequent Operational Programmes.

Terms of Reference

In 2005 the Minister for Transport, Mr. Martin Cullen, T.D. sought and obtained assurances from Aer Lingus that, in the context of a level playing field between the airline and its competitors, it will maintain the current level of transatlantic traffic, circa 400,000 passengers a year, with regular year round scheduled services between Shannon and Boston and New York.

Minister Cullen further proposed in October 2005 to prepare an economic and tourism development plan in consultation with his colleagues, Ministers for Arts, Sport & Tourism and Enterprise Trade & Employment, to ensure that Shannon International Airport sustains and grows transatlantic air services. Following this announcement a Deputation met with the Minister for Transport in December 2005 and it was agreed that the Mid-West Regional Authority would coordinate and prepare a submission on the tourism and economic development priorities for the Shannon International Airport catchment area. It was then agreed that this administration group, comprising the Mid-West Regional Authority, Clare County Council, Shannon Development, Shannon Airport Authority, S.I.G.N.A.L.³ and IBEC Mid-West, should be broadened to include a wider regional interest and inter-departmental representation to deliver the plan. (See page 10 for full membership)

The terms of reference for the plan are to assess the economic impact of 'Open Skies' on Shannon International Airport and on the greater West of Ireland region in terms of business, tourism and foreign direct investment. The plan had to establish a cost schedule and the funding mechanisms involved in the implementation measures proposed in the plan and explain how these measures will be incorporated into National Strategies to include the current and more importantly the next NDP 2007-2013.

³ S.I.G.N.A.L. – Shannon Ireland's Gateway New Action Lobby

Tourism and Economic Development Plan Working Group

Organisation	Constituent
Clare County Council	Alec Fleming (Chair)
Mid-West Regional Authority	Tom Kirby
Mid-West Regional Authority	Seamus Treacy
Shannon Development	David Hogan
Shannon Airport Authority	Martin Moroney
IBEC Mid-West	Donncha Hughes
S.I.G.N.A.L.	Joe Buckley
Department of Transport	Robin McKay
Shannon Chamber of Commerce	Triona McInerney
American Chamber of Commerce	Bill Doherty
B.I.W.I. ⁴	Seamus O'Sullivan
Tourism Ireland	Niall Gibbons
Western Regions Tourism	John King
North Tipperary County Council	Terry O'Niadh
Limerick County Council	Edmund Gleeson
Limerick City Council	Kieran Lehane

Robin McKay, Aviation Regulation and International Relations Division, Department of Transport, acted as the point of contact with the Group and the Government Departments of Transport, Arts, Sport & Tourism and Enterprise, Trade & Employment.

⁴ B.I.W.I. – Business Interests West of Ireland

Section 1 – Shannon Airport Authority - Position on ‘Open Skies’

1.1 Introduction

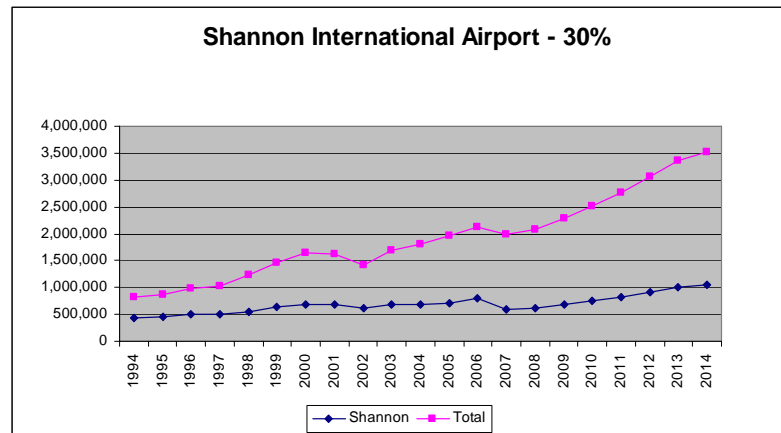
The objective of the Shannon Airport Authority (SAA) is, during the transition phase to ‘Open Skies’, to maintain and grow sufficient transatlantic passenger throughput (critical mass in numbers and destinations) to support the Airport’s business into the future.

The target for Shannon International Airport is to secure a 30% share of the direct transatlantic market between North America and Ireland and to achieve an appropriate sustainable level of year-round services to main US gateways.

It is accepted that the future viability of Shannon International Airport is largely dependent on the delivery of a vibrant year-round transatlantic passenger base, with ongoing growth into the future. The SAA traffic targets from 2005 to 2014 are shown in Figure 1.

An action plan, including exchequer funding of €53m over a 5-year period, is required in order to deliver over €900m tourism spend from North American visitors and to underpin the future of the airport.

Figure 1: Transatlantic Passengers to 2014 –Target Share

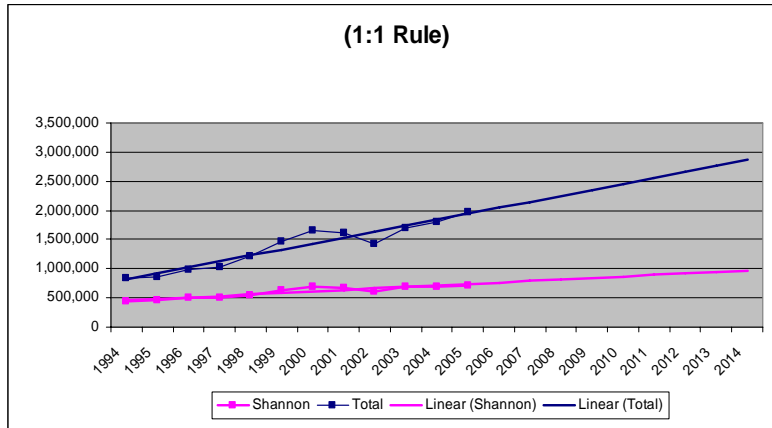


Source: Shannon Airport Authority

1.2 Context

- Deregulation of the US-Ireland passenger market commences 1st November 2006 when a major diminution of Shannon’s gateway status is introduced. Full ‘Open Skies’ for passenger traffic will apply from April 1st 2008. Shannon’s gateway status will be lifted from all cargo flights from 1st November 2006.
- Shannon International Airport’s market share of total direct transatlantic passenger traffic fell from 52% in 1994 (the last year of its sole gateway status) to 37% in 2005: the overall market grew from 830,000 to 1.9 million in that period. Figure 2 shows the actual traffic from 1994 to 2005 and projected forward to 2014 on the basis of the existing dual gateway arrangement. These projected figures are also shown in Table 1.

Figure 2: Projected Shannon Traffic to 2014



Source: Shannon Airport Authority

Table 1: Transatlantic Traffic Target

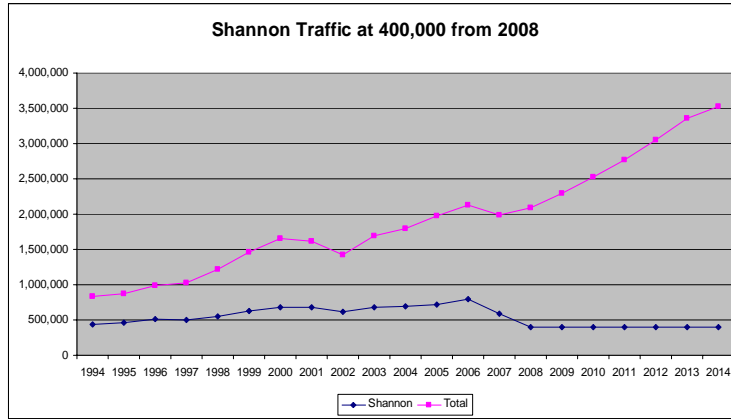
Year	Shannon (Open Skies)	Total (Ireland / North America)	Shannon (1:1 Rule) (Projected)
2005	713,556	1,974,060	775,000
2006	800,000	2,186,554	800,000
2007	665,546	2,218,487	825,000
2008	705,479	2,351,596	850,000
2009	740,753	2,469,176	875,000
2010	777,790	2,592,635	900,000
2011	816,680	2,722,267	925,000
2012	898,348	2,994,493	950,000
2013	998,183	3,293,943	975,000
2014	1,057,356	3,524,519	1,000,000

Source: Shannon Airport Authority

- The opportunities and threats of the revised framework have been evaluated in the independent study carried out recently by the Chambers of Commerce of Ireland.⁵ This report highlights the threats that Shannon International Airport is likely to encounter because of 'Open Skies' while emphasising the benefits for Aer Lingus and Dublin Airport. It recommends swift action to strengthen Shannon International Airport's position. Figure 3 shows the likely traffic projection stated in this study.

⁵ EU/US Air Transport Agreement – Potential Impact on Ireland, Sorensen & Dukes. Commissioned by Chambers of Commerce of Ireland, Air Transport Users Council

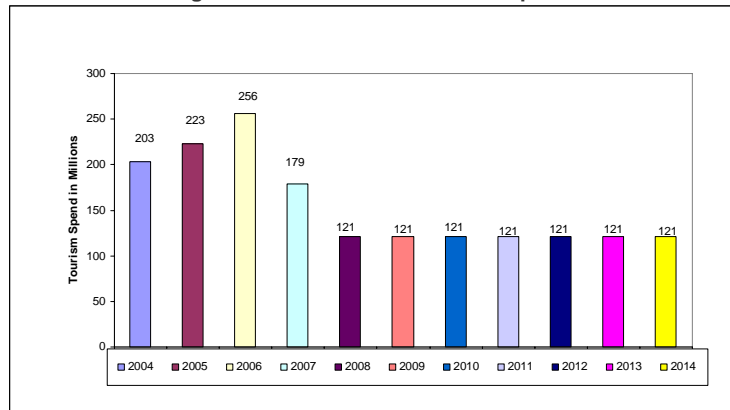
Figure 3: Projected Traffic 2008-2014



Source: Shannon Airport Authority/Sorensen & Dukes

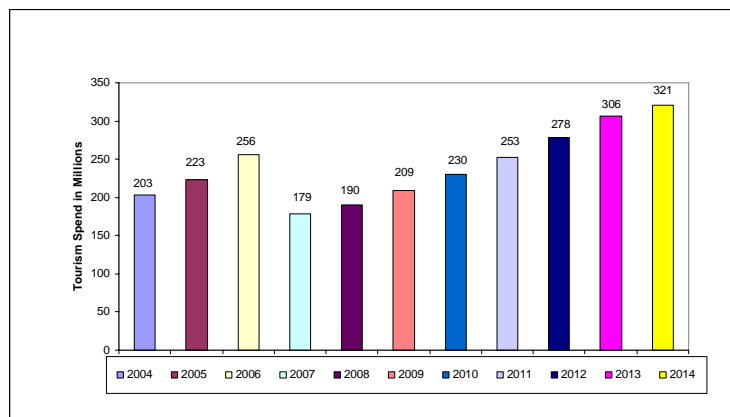
- The value of direct Transatlantic business in 2005 to Shannon Airport was €25m in revenue terms. A further €3m in revenue was generated by commercial transatlantic passengers going through Shannon to / from Dublin. Furthermore, revenue spend in the region by North American visitors was €278m. Transatlantic year-round services underpin the Regional US industrial investment of over €35bn in the West of Ireland.
- Shannon International Airport now has to move rapidly from a regulated market that provided it with substantial benefits to a fully commercial environment. The long-term performance for Shannon’s transatlantic business in the open market will depend on how the lead-in transitional period is managed.
- The projected revenue spends from American visitors based on the Chamber of Commerce report and the SAA targets are shown in Figure 4 and Figure 5 respectively. As can be seen from these, over €900m spend is at risk if Shannon’s transatlantic traffic is not maintained and further developed.

Figure 4: North American Visitor Spend – ATUC



Source: Shannon Airport Authority/Sorensen & Dukes

Figure 5: North American Visitor Spend – 30% Share



Source: Shannon Airport Authority

1.3 Response

- Shannon’s response must be swift and firm both in its internal arrangements and its influence on other countervailing measures. These must include industrial, tourism and infrastructural developments that are required to sustain and create further demand for both transatlantic and short-haul airline services at Shannon International Airport.
- While the focus of the SAA must remain firmly on the airport business, it is vital that regional and national stakeholders plan and implement a coordinated strategy so as to ensure supporting mechanisms are put in place that will assist the airport in achieving the desired outcome under the ‘Open Skies’ regime.
- Shannon International Airport must capture a greater share of Irish-originating traffic, particularly in the short-term, during which Dublin Airport will be developing additional terminal capacity. A specific campaign to attract passengers from its natural catchment area is required, e.g. from Galway city and environs as well as from North Cork, Kerry, Tipperary and the regions south of Limerick city.
- The provision of improved ground access is critical and the SAA supports the urgent acceleration of road development from the Galway region and from the region south of Limerick. The road access to Shannon is the top priority for the SAA and should be included, with appropriate timelines, in Transport 21. While the proposed rail developments are also important, road development must be prioritised and completed at the earliest possible time – ideally by the commencement date of full ‘Open Skies’.
- Airport management must re-position the airport, devise appropriate pricing strategies and incentives, and provide high quality facilities and customer service. A competitive cost base must be realised so as to support an efficient operation and an attractive airport for airlines within a fiercely competitive US-EU market and volatile airline sector.
- Furthermore, the maximisation of commercial (non-aeronautical) income will be critical, as it will become increasingly difficult to maintain a significant level of aeronautical revenue in a competitive market. Transatlantic passengers generate

significantly greater commercial income per head than short-haul passengers (multiple of 3) – this must be exploited to the fullest extent possible.

1.4 Action Plan

The following action plan must be developed immediately, and implemented within the next 5-year period so as to support Shannon International Airport in achieving a successful outcome to the introduction of ‘Open Skies’ – an appropriate level of both year round and seasonal service, with traffic levels shown in Figure 1.

- i. An independent and financially viable Shannon International Airport which provides for: -
 - a. Delivery of safe, attractive and competitive operations by SAA;
 - b. An aggressive SAA commercial development strategy for the airport facilities and assets;
 - c. Re-branding and promotion of Shannon International Airport by the SAA within Ireland and at connected US airports / cities and as potential US-European hub;
 - d. Funding for restructuring and capital expenditure.
- ii. Tourism Promotional Fund of €44m to be provided by exchequer funds and to be administered by relevant Western Region Agencies on the following basis: (See Section 3.3.2 for further detail)

Year	Amount €m
1	9.5
2	9.0
3	8.5
4	8.5
5	8.5

- iii. Route Support Fund of €9m for existing and new services to be provided from exchequer funds on the following basis: (See Section 3.3.2 for further detail)

Year	Amount €m
1	3.0
2	2.0
3	1.5
4	1.5
5	1.0

1.5 Shannon International Airport – Positive Attributes

The Airline Perspective

- In terms of facilitation of aircraft operations Shannon International Airport offers a “user-friendly” environment not normally found at international air facilities today.
- With no major urban development nearby, the noise footprint of the single runway in use delivers minimal impact on the airport’s neighbours and even the largest aircraft can operate without flight path or curfew restrictions.
- A weather record largely free from fog or crosswind conditions that could cause flight disruption enhances these unrestricted operational conditions.
- The runway length- at 3,199 metres, the longest on the island of Ireland, facilitates operations of unrestricted payload and distance by any aircraft operating today. This,

combined with a lack of slots and curfews at Shannon, makes for an offering of increasing rarity in Europe. Current traffic projections indicate that runway capacity is adequate for the foreseeable future; however scope exists to increase capacity by changes to taxiways etc.

- Shannon's fueling facilities represent a significant advantage in terms of continuity and efficiency of supply to airline customers. With a storage capacity of 11 million gallons (approx. 30 days' supply), the airport's fuel farm receives fuel directly from ships in the Shannon Estuary and the fuel is distributed by means of a hydrant system to the apron. This minimises fuel handling, provides for expeditious handling of large quantities of product and represents a sustainable and secure system of aircraft refueling.

The Passenger Perspective

- Overseas passengers arriving at Shannon begin their Irish visit by encountering uncongested rural roads upon leaving the airport. This contrasts with visitors' experience of most international airports and fits well with the expectations of tourists to the West of Ireland. With the welcomed development of the national primary routes in the region, this experience will be enhanced further.
- For departing passengers Shannon International Airport is a low-cost hub offering greater accessibility, convenient parking close to Terminal and the impending improvements of the road networks will greatly enhance this experience.
- Another feature which greatly reduces the stress of air travel at Shannon is the U.S. Customs & Border Protection (CBP) facility. Conveniently located in the Departures Lounge between the Duty Free Shops and the boarding gates, CBP pre-inspection enables the passengers' dwell time at the departure airport to be used efficiently in order to save queuing time after a transatlantic flight. The pre-inspection process also enables passengers to make earlier flight connections at their U.S. destination and reduces the stress involved with connecting as it speeds up the arrival process at the U.S. airport.

Customs & Border Protection Facility (CBP)

- An extension of the US Customs and Border Protection facility at Shannon International Airport to provide full Customs and Agriculture pre-clearance would provide an innovative and unique opportunity for the airport to considerably grow its transatlantic market.
- It would provide the airport with a unique selling point, which would make it very attractive for Transatlantic Airlines. Shannon International Airport needs a distinctive advantage to underpin its current transatlantic traffic and maximise its development.
- Availability of enhanced services would allow disembarking passengers in the US to arrive as domestic passengers with no queuing for Immigration or Customs. Full pre-clearance would also enable Shannon passengers to make hassle free transfers at US hubs with a considerable saving in time.
- For the airlines it would create seamless connections at US hubs and allow carriers to use less expensive domestic terminals.
- It would attract new air services to US airports without inspection facilities and would create competitive advantage for Shannon.
- It also has the potential to considerably grow the airport's corporate jet traffic which would generate increased revenue for Shannon.
- In a recent interview with the Limerick Leader the US Ambassador stated that the US are very anxious to provide full pre-clearance at Shannon Airport because it would fully utilise the CBP facility.

Section 2 – Critical Infrastructure Requirements

2.1 Introduction

In the context of a post 'Open Skies' environment a good quality and efficient infrastructure network to and from Shannon International Airport is essential to the competitiveness of the airport and the greater Shannon region. Investment in infrastructure is the single most important requirement supporting industry and tourism in the region. Specifically, the completion of the N18 Limerick-Galway Dual Carriageway is the number one priority as it will expand considerably the population in the catchment area of Shannon International Airport by reducing travel times.

This section outlines the key infrastructural upgrades required to sustain Shannon International Airport's position in the light of 'Open Skies'. The **infrastructural projects** recommended for attention in this report are explained under the following headings: Roads, Rail Network, Bus Network, Information Technology, Urban Renewal, Energy and Water Services. The delivery of these projects should be accelerated to coincide with the full implementation of 'Open Skies' in 2008.

2.2 Roads

- The key road in the vicinity of Shannon International Airport is the N18 (Limerick to Galway), which is of dual carriageway standard from Limerick to Shannon. It carries high traffic volumes daily, 29,000 vehicles Annual Average Daily Traffic in 2003 with 6.6% of this accounting for heavy commercial vehicles⁶. The Ennis by-pass will be partly opened by the year end and compulsory purchase orders have been published for the Crusheen/Gort route, for construction to commence before 2008. This project needs to be expedited and in tandem the next section from Gort to Oranmore should be prioritised for planning and construction, for completion by 2010.
- Improved signage on key transport corridors is vital and should be provided as part of road improvement schemes.
- The completion of N19 into Shannon International Airport is also of huge importance and should be fast-tracked. This road experiences severe congestion during the a.m. and p.m. peaks. The main congestion points are at the key junctions namely Ballycasey Cross and at the access roads to Shannon Free Zone and Shannon Town.
- The Northern Distributor Road linking Coonagh to Plassey will provide access to the University and Technology Park at Limerick and lands for strategic development areas to north of Limerick. This is at route selection stage and the recommendation is to provide a bridge crossing over Shannon, linking the Northern Distributor Road to Shannon International Airport.
- A review of the Limerick PLUTS⁷ will be completed shortly. This will provide an important framework for transport and land use planning.
- The development of a Transport Service Management Plan for the Region including the provision of a necklace of Park and Ride facilities tied in with road, rail and air transport modes regionwide is necessary.

⁶ NRA – National Roads and Traffic Flow 2003

⁷ P.L.U.T.S. – Planning and Land Use Transport Study

- New bridges over the Shannon River at Killaloe and O'Brien's Bridge are critically important. Routes have been selected and preliminary design is under way in the case of Killaloe By-Pass and related road improvements. The route selection report identifies the need for a further crossing adjacent to O'Brien's Bridge.
- Completion of inner relief roads, distributor roads and outer relief in Limerick/Shannon, Ennis and Galway city are essential in order to complement the key infrastructural provision listed above.
- The contract has been awarded for the 4th River Crossing (tunnel) in Limerick and this together with Limerick to Nenagh Dual Carriageway will greatly reduce travel journey times on the N7.
- A feasibility study should be commissioned into the viability of a 5th River Crossing connecting Shannon International Airport and Foynes.
- Significant improvements are underway in the case of the N6 (Galway to Dublin) road and in the case of the N8 (Cork to Dublin) road.
- Improvements to roads to the South/Southwest N20 (Cork) and N21 (Tralee) are also important as are improvements to the N24 (Limerick/Waterford) and N25 (Cork/Waterford/Rosslare) roads.
- Upgrade of N69 (Limerick/Tarbert).
- Upgrade of Limerick/Thurles road.
- Improvements to strategic regional roads in the region required to provide linkages between national network and significant regional population centres.

2.3 Rail Network

- Western Rail Corridor

The Western Rail Corridor links Sligo to Limerick. Two sections of it are already open, the Sligo to Collooney section and the Ennis to Limerick section, which has recently been upgraded.

As stated in the Transport 21 policy document of 1st November 2005, it is now Government Policy to re-open the Western Rail Corridor as part of a comprehensive rail development programme for the whole country. This is to be done in 2 phases, commencing with the Ennis-Claremorris section and followed by the Claremorris-Collooney section. As part of Phase 1 the railway north of Claremorris is also being cleared and fenced. The section from Athenry to Claremorris has been comprehensively cleared during the period October 2005-January 2006, and the clearance and fencing of Claremorris to Collooney is in progress.

This Plan re-iterates the importance for Government to deliver on its promise in Transport 21 and recommends the completion of the Western Rail Corridor as a matter of urgency.

2.5 Information Technology

National and international access and connectivity is a critical component of a region's business competitiveness and the provision of a first-class telecommunications infrastructure is a must in today's environment. While the region has been progressing satisfactorily in broadband provision, there are still areas in need of continued commitment.

- Following the successful completion of the Limerick Metropolitan Area Network (MAN) project by Shannon Broadband Ltd., the Department of Communications, Marine & Natural Resources have approved the further rollout by Shannon Broadband of eight more Metropolitan Area Networks in the counties of Clare, Limerick, and Tipperary & Offaly. The objective of Phase II in these eight towns is to hand over to the government appointed MSE (Managed service Entity) an installed (unlit), carrier neutral, high-speed, open access, resilient broadband infrastructure to address the medium to long term requirements of network operators, businesses and organizations, with the aim of supporting inward investment, indigenous companies and social development in the Shannon/Mid-West region. The rollout of this phase will commence in Quarter 3 2006.
- MANs are urgently required in the large urban towns of Shannon, Ennis and Thurles. Approval from the Department of Communications, Marine & Natural Resources is anticipated.
- Small rural communities find it difficult to get adequate user numbers necessary to qualify for the current community broadband scheme. Low fares tourist customers to the Shannon region book the majority of their holiday arrangements in advance over the internet. To tap into this e-tourism market adequately, priority website presence is vital. It is also important that high-quality, low-cost electronic access is provided to all parts of the region particularly in the context of the development of awareness of the local and less known tourism product. Smaller rural communities in the region should be provided with broadband access by being permitted to piggyback on successful community broadband schemes. The Third Call should facilitate the roll-out to all areas of the Community & Group Broadband Scheme.

2.6 Urban Renewal

- Additional investment in town and city centres is urgently required in Limerick/Shannon, Ennis and Galway in terms of regeneration to international standard. Work is currently ongoing in developing programmes to tackle urban renewal and should be supported.

2.7 Energy

- The Bord Gáis Network is being extended to a considerable number of centres in the region. However it is necessary to ensure that aggressive marketing is put in place to ensure take-up of the service.
- Incentives should be provided to encourage existing industrial, commercial and residential buildings connect to the gas network.
- Security, resilience and quality of electricity supply is required to attract industry especially in Limerick/Shannon, Ennis and Galway city as significant deficiencies still

exist. Continued investment in Moneypoint and the upgrading of the region's transmission network is necessary.

2.8 Water Services

- The delivery of the Water Services Investment Programme is recommended and it is critical that indicative deadlines are adhered to, to support industry, tourism and housing development.
- In particular larger towns such as Shannon must be in a position to attract significant industrial development which can individually have 500,000 gallon in / out demand. The Water Services Investment Programmes for each of the counties in the region addresses this issue.
- In addition, smaller centres which attract large numbers of tourists also have sewerage treatment requirements not being currently met and the lack of which is causing considerable environmental damage in some areas.

See: Map of the Region's Infrastructure Developments & Critical Key Infrastructure Requirements

Section 3 – Tourism

3.1 Introduction

The importance of tourism to economic development, and specifically to better balanced regional development, was highlighted in a recent report on “*Understanding the Economic Contribution of Tourism to Economic Development*” by Professor Jim Deegan of the University of Limerick and Dr. Richard Moloney of NUI Cork for Ireland West Tourism. The report makes the point that services are the dominant driver of Irish economic activity and tourism is a key component of the services sector in this country. This is in line with international experience and most forecasts predict that tourism will continue to expand in importance in the years ahead.

The study identifies Tourism as a key industry in the West region, generating €1.9 Billion in economic activity. Scaling this measurement up to include all four regions (North West, West, Shannon and Cork/Kerry), the estimated economic impact of the tourism is almost €6 Billion. The report proved that tourism must be central to the economic health and development of the wider region. It also highlighted a number of key facts:

- Tourism is 275% more important to the Western Economy than to the Dublin Economy.
- 7.8% of all economic activity relates to tourism in the region.
- Every Euro spent by tourists generates a further 50c in the Economy
- Every €1m in tourism revenue creates 10 jobs in the economy, 5 directly and 5 indirectly.

A critical issue uncovered in the study was the shape of the economy. Specifically, it was identified that while overall full time employment in the region had grown by 30%, there was significant variances between sectors. In particular, it demonstrated that agricultural employment has declined by 25% while construction has grown by 80%, it also showed a general move towards a service based economy. Given that tourism has been acknowledged as the largest, and potentially most sustainable indigenously owned internationally traded service, coupled with the decline in agricultural employment, the report concludes that the tourism industry must be central to the economic development of the region and requires significant and sustained investment in innovation, product development and marketing.

3.2 Recent Challenges

The Tourism industry in the Western Regions is going through a period of unprecedented change and challenge in recent years. The issues have been well documented in recent reports and analysis, the highlights of which are as follows:

- Sharp decline in international holiday bednights across the Western Seaboard in the period 1999 – 2003:
 - Shannon Region -39%
 - North West -24%
 - Ireland West -21%
 - Cork Kerry -6%
- The cumulative overseas bednight losses for the three Western Regions over the 5 year period 1999-2003 was over 8 million bednights. Recovery and growth of promotable tourism for the Western Regions of Ireland is a challenge that requires a strong response.

- Relatively little innovation and development in the visitor attractions in the region.
- Considerable decline in international visitors relation to “special interest” products e.g. Walking, Golfing, Equestrian, Angling.
- Decline in visitor experience and product quality in relation to “special interest products” e.g. Walking and Angling.
- Although now committed to in “Transport 21”, critical infrastructure for the Western Seaboard has been relatively slow to be implemented, especially:
 - Limerick to Galway Road
 - Limerick to Dublin Road
 - Fourth River Shannon Crossing
 - Ennis Bypass
 - Galway City Outer Bypass
 - Galway Dublin Road.
- Macro trend in tourism is towards short stays driven by direct air access. This has not favoured the West as 80% of all air access to the country comes through the Dublin gateway.
- Since 2000 the Western Regions have experienced a major growth in supply of hotel bedrooms. This supply side increase has not been met with a demand side increase. This has led to a contraction of supply in other sub sectors of the accommodation market e.g. B&B's. There is a pressing need therefore to drive demand, primarily from the international marketplace.
- Potential business threat from open skies if fewer North Americans land in Shannon. American visitors through Shannon International Airport have a greater propensity to travel throughout Ireland thus spreading the benefits, and compared to other nationalities, spend more per head while in Ireland.

3.3 'Open Skies' & The Marketing Challenge

3.3.1 The Challenge

In order to meet the challenge of Open Skies and the expected decline in visitors through Shannon, a targeted and differentiated approach needs to be communicated which focuses on the Western Regions. This needs to be incremental to existing activity. In addition, any additional campaign would be fully complimentary to the new Tourism Ireland campaign just launched in 2006.

3.3.2 The Markets

The main Markets in which Tourism Ireland operate are USA, Great Britain, Germany and France. These account for over 80% of visitors to Ireland. A profile of the type of customer that lands at Shannon International Airport from the USA is set out in Figure 1 below.

Figure 1: Best USA Prospects for Shannon International Airport: Holidaymakers

	Total	To Shannon International Airport
Age	Spread age 25 - 64	Core age 45 - 64
Core Needs	Sightseeing & Culture 78% Outdoor Activities 5% Family & Loved Ones 8% Relaxing 5%	Sightseeing & Culture 85% Outdoor Activities 7% Family & Loved Ones 5% Relaxing 1%
Class	Mid Social Class 36% AB 56% C1	Mid social class 21% AB 66% C1
Party	54% married Couples (38%), individuals (18%) or families (23%), groups (21%)	More settled – 60% married More travel to Ireland as couples (46%) & families (28%)
Experience	Mid experience of Ireland 3% Irish 30% repeat visit	More experience of Ireland 2% Irish 40% repeat visit
Product	Touring (64%) City Break (15%) Countryside Holiday (9%) Culture / festival (9%)	Touring holiday (76%) Countryside holiday (11%) Culture / festival (8%)
Region (dependent on access)	New England (11%) Mid Atlantic (15%) Mid West (21%) South (20%) West (23%)	South (28%) esp. Florida Mid West (24%) esp. Illinois, Ohio West (18%) esp. California Mid Atlantic (14%) esp. NY and Pennsylvania New England (13%) esp. Massachusetts

Source: Fáilte Ireland

The current Tourism Ireland campaign lends itself well to adaptation to a Western Region theme. This can be done by adapting and adding to the existing four TV executions and four print executions already in stock as part of the new campaign.

3.4 Route Support

A dedicated fund should be established to work with carriers who fly directly into Shannon International Airport in order to promote inbound tourism. As already mentioned in Section 1 of this plan a Route Support fund of €9m over a 5-year period is recommended. The following objectives are proposed:

- Focus on new Aer Lingus Gateways by undertaking a joint advertising programme to introduce and promote new services
- Sustain existing carriers by engaging in major co-op marketing programmes with all airlines to promote their Shannon services
- Undertake winter/ off season co-op promotion campaigns with all airlines by advertising in feeder cities to promote winter season.
- Continue to work with existing carriers to promote access particularly from GB/Europe during the winter months

In this regard care would be needed to ensure that the Route Support fund would be in compliance with European Law.

3.5 Tourism Promotion Fund

3.5.1 Promotional Programme

The promotional programme would consist of four main elements;

- Additional advertising campaign (TV, Radio, Web, Print and Direct) focusing on activity vacations in the western regions.
- Development of new special promotional materials for use in all advertising and promotional activities.
- A direct marketing and e-marketing campaign to targeted consumers using “added value” lists of subscribers to major magazines, the Tourism Ireland consumer database and the databases of the partner airlines and Regional Tourism Authorities.
- Multi city trade and consumer promotions bringing major industry from the western regions and also sponsoring some of the non-traditional industry to supplement the sales force in the market.

3.5.2 Publicity Programme

- Undertake high profile multi city publicity tour of US led by the Minister and showcasing the best of the western regions.
- A new one hour programme on the Western Regions of Ireland. Regions extracts to be used as background to all promotional and PR activities.
- Specially designed National Geographic map on Western Regions with all tourism icons and sidebar information on all points of interest.
- A new series of 6-8 programmes with Smithsonian Magazine featuring the best of the Western Regions combined with a programme of advertising in magazine.
- A new programme to promote inward journalists focusing on regional activities, attractions and events.
- A particular emphasis will be placed on maximising the value of the St. Patrick’s Day celebrations in America. Key locations such as New York, Savannah and San Francisco will be featured strongly.

3.5.3 Funding

In addition to the Route Support fund, this plan proposes a Tourism Promotion Fund totalling €44m (Yr.1: €9.5m, Yr.2: €9m, Yrs.3-5: €8.5m per annum), the majority of which would be related to the North American market and will be used to fund the actions and priorities above.

3.6 Tourism Product

According to the Tourism Action Implementation Plan Implementation Group (Final Report, March 2006), “There is evidence to suggest that, in many ways, Ireland’s tourism product has become tired and lacking in verve or ‘bounce’ for many tourists.” In addition, the Irish Tourist Industry Confederation (ITIC) has set out a number of proposals regarding product development including:

- Better integration of the existing portfolio of sites of the OPW in order to marry the supply of historical sites with the demand of overseas visitors.
- Enhanced management training and development efforts within the industry.
- The feasibility of a major Regional Conference Centre at Shannon/ Limerick with a capacity of 2000 should be explored.

3.7 Product Development

Building competitiveness in this growing sector will be a major challenge as more destinations attempt to gain a share of the international tourism market. Deegan and Moloney point in their report that “*The successful destinations of the future will be those that maintain a clear focus on market trends and develop appropriate supply side policies and products*”. It is critical, therefore, that the initiatives being put in place to market the Western Regions in the aftermath of transatlantic ‘Open Skies’ are accompanied by a similar commitment to developing the attractions and products that will attract the tourists of the future and generate demand for transatlantic air services at Shannon International Airport.

The Western Regions need to coordinate their efforts in product development and in marketing to ensure a competitive tourism industry for the future. The emphasis should be on developing new tourism products of scale, and clusters of tourism attractions, that will act as magnets for international and domestic visitors. This will require major inputs from the private sector. The scale of the required investment means that real impact will only be delivered on the basis of partnership between the public and private sectors.

The main product development opportunities for the Western Regions in the medium to longer term can be summarised under the following categories:

1. **Tourism Product Clusters** – developing major national tourism attractions including the Cliffs of Moher, Bunratty Castle and Folk Park, Connemara and Lough Derg so that they are recognised as major international tourism attractions. Each location can become the focal point of a cluster of tourism activities and facilities that will deliver a world class experience for visitors.
2. **Recreational Use of the Countryside** – upgrading and developing a series of walking and cycling trails across the Western Regions to world class standard. This will include the physical development of the trails to a high standard, and packaging them for promotion in print and virtual media.
3. **Marine Development** – developing a major “hub” projects in the Shannon Estuary and Galway bay and linking them with shoreline developments along the Western Seaboard, especially the marinas that stretch from Kilrush to Sligo.
4. **Shannon River Corridor and Lough Derg Water Park** – the River Shannon and Lough Derg provide the focal point for a tourism development zone that can facilitate the development of a range of new tourism attractions, including health and family resort type products.
5. **Culture and Language** – building on the Western Regions’ unique heritage of language and culture, the opportunity exists to build a series of cultural and language centres, linked with a Heritage Trail of re-energised heritage towns throughout the regions. The Burren and Connemara are examples of internationally established centres with the potential to stimulate further heritage related development in the Western Regions.
6. **Urban Tourism** – the cities of Galway and Limerick can be further developed to become major tourism hubs in their own right. Key initiatives that bring this about include the proposed docklands developments in both cities and the regeneration of their urban centres to international standard.
7. **International Conference Centre** – an international standard Regional Conference Centre located near Shannon Airport that would attract high yielding visitors to the

Western Regions on a year-round basis is a key priority for the tourism sector in the medium term.

A Regional ***Tourism Innovation Programme*** must also be a key element of the new approach to tourism product development. There will be a continuing need to implement more innovative approaches to developing and marketing the tourism sector in the years ahead and a structured approach to promoting innovation will be essential. The innovation programme should have as a key output, projects that will provide year-round, weather independent facilities for visitors.

Section 4 – Enterprise Development Strategy

4.1 Introduction

National and international access and connectivity is a critical component of a region's business competitiveness. Business requires skills from graduates and experienced personnel, business property solutions, logistics solutions in terms of international connectivity from the airport, national access via roads and Tier 1 broadband connectivity so that this region offers a business environment equivalent to London, New York or Tokyo. The Mid-West region, comprising North Tipperary, Limerick and Clare, has key skills in technology, research, engineering, finance and management. Companies located in this region are winning international contracts based on their ability to deliver for customers. Companies are also winning investment from corporate decision makers to expand their Irish facilities adding new products and business functions. The region is well represented in the Irish Times Top 1000 companies in Ireland. Not only have we global multinational companies at the top of the list, the region also boasts a range of top-performing indigenous companies.

Shannon International Airport is a major underlying reason for the development of the strong industrial base of the Mid-West region. Indeed the complementary development of Shannon Free Zone and other industrial locations such as Ennis and Limerick (Plassey and Raheen) are linked in history with the development of the airport. The Mid West region has a strong record in international trade as evidenced by the presence of 110 companies in the Shannon Free Zone. The region has attracted 75 multinational companies from the US and Canada and the region also hosts French, German, Swiss, Spanish and Icelandic subsidiaries. Over recent decades, indigenous industry has expanded into the UK, Europe and the US and more recently into Asian markets. An excellent sub-supply sector has developed with over 90 engineering and electronic sub supply companies located in the Shannon region.

IBEC Mid-West in conjunction with Ennis Chamber and Shannon Chamber of Commerce published in March 2006, 'Embracing the challenges and opportunities of Ireland-US Open Skies', following a survey of members in Galway, Clare, North Tipperary and Clare undertaken in December 2005. This report highlighted the critical importance of retaining and building on the level of transatlantic services from Shannon International Airport. The message from employers is that Shannon International airport is hugely important to business and employment and that 'Open Skies' will have implications for the business community and the tourism sector of the greater west of Ireland region. The report acknowledged that at the time of publication, it was not possible to provide a definitive answer as to which services will be affected by the new policy. Airlines will have the freedom to choose frequency of services, daily or year round, whether to stop in Ireland and destinations in the US. The only certainty is that as airlines seek to maximise profits, every airline will fully consider its options.

The Introduction to this Plan highlighted that the region must work to continue our economic success within the context of EU-US 'Open Skies'. The challenge is to deliver on the vision of this region to 2020 as 'an inclusive world class region for living, learning, investing, working and leisure contributing to Ireland's economic success and improving the quality of life of all citizens.' The commitment to Balanced Regional Development impacts directly on business investment, employment levels and the future economic growth in Limerick, Clare and North Tipperary. We cannot be complacent, as the harsh reality is that there were over 2,300 redundancies notified to the Department of Enterprise Trade and Employment from counties Limerick, Tipperary and Clare in 2005. Indeed, the one certainty is that the pace of change, arising from globalisation and the

knowledge economy, will increase and companies will have to respond to ever changing markets and customer requirements.

Section 2 of this plan outlines key priorities, budgets and targets relating to critical infrastructure. Section 3 specifically addresses the requirements of Tourism, a major business sector that is hugely reliant on Shannon International Airport. This section will outline the requirement for an Enterprise Development Strategy for the region with a strong focus on the twin aims of fostering indigenous business and attracting foreign direct investment. The Plan calls for an assessment of the region's value proposition over and above infrastructure that will make business successful in this region thereby creating a virtuous cycle of growth and development that fosters employment, development of R&D and technology expertise and a vibrant year-round business market for Shannon International Airport.

4.2 Enterprise Strategy in Ireland

The Lisbon Strategy was adopted in March 2000 at the Lisbon Summit when EU member states set a goal for the European Union over the next decade to become:

"the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion".

This strategy involves a set of policy areas, from research and education to environment and employment⁸.

A framework for enterprise development in Ireland is provided by the Enterprise Strategy Group (ESG) report, *Ahead of the curve* published in 2004. This provided a blueprint for how Ireland is to secure and build on its position as a developed economy. Enterprise Ireland then published 'Transforming Irish Industry', its strategy for 2005-2007, in response to the ESG report highlighting that Ireland's economic performance will increasingly depend on the success of indigenous companies particularly in international markets.

Other relevant reports/articles that deal with Enterprise Development in the Irish context include:

- Report of the Small Business Forum, May 2006, as submitted to the Minister for Enterprise Trade and Employment (www.forfas.ie)
- Expert Group on Future Skills Needs EGFSN (2004) Submission to the Forum on the Workplace of the Future February www.skillsireland.ie
- Forfas (2004) Employment Survey (www.forfas.ie)
- Global Entrepreneurship Monitor (2003) How Entrepreneurial is Ireland? Dublin, Department of Business Administration, University College Dublin www.gemconsortium.org/download.asp?fid=327
- Global Entrepreneurship Monitor (2004) Global Entrepreneurship Monitor 2004 - National and Regional Summaries, [online] Available: <http://www.gemconsortium.org/>
- O'Sullivan M (2000) The Sustainability of Industrial Development in Ireland Regional Studies Vol.34 no3 pp 277-290
- Stel. A and M.Carree and R. Thurik (2004) The effect of entrepreneurship on national economic growth: An analysis using GEM database Paper presented at First GEM research Conference: Entrepreneurship, Government Policies and Economic Growth Berlin 1-3 April

⁸ See <http://europa.eu.int/growthandjobs> for further information

- Callanan.S and Cuddy. M (2004) Rural Enterprise and Sustainability. Innovative approaches to the needs of rural areas NUI Galway report p 5-7
- IBEC (April 2002), Enterprise in a Competitive Economy

4.3 An Enterprise Strategy for the Region

The development of the Mid West region will require that different types of economic activity are facilitated and encouraged. These include:

- activities that require large-scale investment by outside investors.
- activities that reflect the entrepreneurial skills and activities of the local population.

As well as considering the source of economic activity, we must consider the sectors in which such activity is likely. These include –

- Manufacturing of goods that requires large-scale external investment
- Manufacturing that adds value to local primary produce
- Provision of services both for international and national trade as well as those that service the local community
- The provision of services to the tourism market
- The provision of knowledge based services such as R&D, financial services, public services, international consultancy

Within this overall context, the two key recommendations in this section are:

1. The roles and responsibilities of the economic development agencies in the Shannon region, IDA Ireland, Enterprise Ireland, and Shannon Development, must be clarified so that the region can leverage maximum advantage from their expertise and record of accomplishment.
2. An Enterprise Strategy must be developed for the region. This strategy must address all areas of business sector and enterprise activity to include foreign direct investment, indigenous enterprise, services, manufacturing and small and medium businesses.

The introduction of EU-US 'Open Skies' provides an important backdrop in developing an Enterprise Strategy for the region particularly if services and connectivity to the US and Canada are affected over the medium term. The stimulus for this Enterprise Strategy for the region is the platform provided by this Tourism and Economic Development Plan and specifically the model provided in the Executive Summary. However, the main determinant of this strategy is the National Development Plan 2007-2013, as this will set the context for enterprise development in the regions by outlining plans for infrastructure development and supports available for enterprise at national level over its term. For example, a critical issue for multinational companies is continuation of Ireland's current taxation regime in relation to personal and business taxation. Another national prerogative is encouraging competition throughout the Irish economy.

The Enterprise Strategy for the region should focus on future actions to be implemented, and the steps to implement them. The strategy will be a practical guide to assist in the implementation of national policy at regional level. As such, a finalised Enterprise Strategy is not required for the implementation of this Tourism and Economic Development Plan. This section will now highlight key areas to be addressed by such a strategy and plot a roadmap for its development.

4.4 Key headings for Regional Enterprise Strategy

The following issues are considered critical to the development of a practical and relevant strategy for Enterprise Development in the Mid West region. (Not in rank order of importance)

- Ensuring a competitive supply of private and publicly provided Business Property for businesses looking to set up and expand in the region
- Planning and development at national, regional and local authority level (Strategic Infrastructure Bill)
- Role of local authorities in fostering enterprise
- Attracting Foreign Direct Investment
- Access to international marketing supports for companies
- Access to business set-up expertise
- Fostering R&D and Innovation
- Finance solutions
- A need to identify and profile the current SME base and profile in Mid West region
- Examination of relationship between small firms and Foreign Direct Investment
- Assessment of trends in employment by sector, skill and profession
- The Enterprise Strategy should focus on the need and benefits of;
 - Collaboration and working relationship between development agencies and educational institutions
 - Collaboration between Educational Institutions and small firms
 - Provision of flexible training and development programmes for owner/managers
 - Training/ Life-long learning/ Management Development initiatives
 - Development of mentoring initiatives
 - Clustering of small firms

The region has a strong tradition of enterprise development, which must be further developed and supported. The success stories in the region include: Shannon Development's Knowledge Network, Westpark Shannon, University of Limerick, Limerick Institute of Technology, Tipperary Institute and enterprise led initiatives such as PLATO and FIT Mid-West. (See Appendix B for further detail)

4.5 Implementation of Enterprise Strategy

The process of implementing an Enterprise Strategy for the region may be as important and valuable as the final output given the importance of developing working relationships among enterprise development agencies, local authorities, educational institutions and business representative organisations. This Plan suggests that an Enterprise Strategy be developed by a group of key stakeholders similar to existing regional structures. For example the structures already in place for the implementation of the National Spatial Strategy/Regional Planning Guidelines includes senior representatives from Limerick City Council, Limerick County Council, Clare County Council, North Tipperary County Council, Tipperary Institute, IDA Ireland, Shannon Development and attendance from relevant Government Departments were appropriate.

The Regional Enterprise Strategy group would comprise a broader representation to include additional organisations such as University of Limerick, Limerick Institute of Technology, Enterprise Ireland, regional Enterprise Boards, IBEC, Chambers, FÁS, Atlantic Way, American Chamber of Commerce and ICTU, reflecting the wider geographical remit of this Tourism & Economic Development Plan. This group should be chaired by a Business Leader from the region and facilitated by the Mid-West Regional Authority, the Department of Enterprise Trade & Employment and the relevant agencies.

Section 5 – Implementation

5.1 Implementation Structure

As the introduction of ‘Open Skies’ and the deregulation on the US market approaches, it is important that the proposals contained in this Tourism and Economic Development Plan are adopted by Government. It is equally important therefore that a process of monitoring and evaluation of their implementation is put in place.

The Mid-West Regional Authority are prepared to provide the Secretariat to an Implementation Group which would consist of National, Regional & Local representation from the Public and Private Sector. The responsibility if this Implementation Group would be to ensure that the recommendations outlined in this Plan are realised.

5.2 ‘Open Skies’ Impact Review

Based on the information currently available the Tourism & Economic sub-group is optimistic that the proposed funding and measures outlined will enable Shannon International Airport maintain and grow its transatlantic traffic in line with the targets set out in this plan. However it is important that an annual review is undertaken to determine the impact of ‘Open Skies’ on Shannon International Airport and the Mid-West. The effectiveness of this plan should also be reviewed. It would be a vital part of the review to ensure that there is not a gradual dilution of transatlantic passenger/cargo traffic, and also to ensure that short-term market conditions do not affect investment and that value for money is achieved.

The Tourism & Economic sub-group under the Mid-West Regional Authority should conduct the review. An independent third party should be used to undertake the research and analysis e.g. ESRI or NESC. The terms of reference should be agreed with all the parties concerned. The review should be carried out in conjunction with the EU-US review of ‘Open Skies’. Senior EU officials have stated that the EU Commission will have no difficulty including Shannon International Airport in its yearly review of ‘Open Skies’ if requested by the Irish government. (*See excerpt of Air Transport Agreement below*)

AIR TRANSPORT AGREEMENT

Article 17

The Joint Committee

1. A Joint Committee consisting of representatives of the Parties shall meet at least once a year to conduct consultations relating to this Agreement and to review its implementation.
2. A Party may also request a meeting of the Joint Committee to seek to resolve questions relating to the interpretation or application of this Agreement. However, with respect to Article 19 or Annex 2, the Joint Committee may consider questions only relating to the refusal by either Participant to implement the commitments undertaken and the impact of competition decisions on the application of this Agreement. Such a meeting shall begin at the earliest possible date, but not later than 60 days from the date of receipt of the request, unless otherwise agreed.
3. The Joint Committee shall review, no later than at its first annual meeting and thereafter as appropriate, the overall implementation of the Agreement, including any effects of aviation infrastructure constraints on the exercise of rights provided for in Article 3, the effects of security measures taken under Article 8, the effects on the conditions of competition, including in the field of Computer Reservation Systems, and any social effects of the implementation of the Agreement.
4. The Joint Committee shall also develop cooperation by:
 - a. fostering expert-level exchanges on new legislative or regulatory initiatives and developments, including in the fields of security, safety, the environment, aviation infrastructure (including slots), and consumer protection;
 - b. considering the social effects of the Agreement as it is implemented and developing appropriate responses to concerns found to be legitimate;
 - c. considering potential areas for the further development of the Agreement, including the recommendation of amendments to the Agreement;
 - d. maintaining an inventory of issues regarding government subsidies or support raised by either Party in the Joint Committee;
 - e. making decisions, on the basis of consensus, concerning any matters with respect to application of paragraph 6 of Article 10.
5. The Joint Committee shall operate on the basis of consensus.

Section 6 – Recommendations & Conclusion

As deregulation on the US market approaches EU-US 'Open Skies' approaches, it is essential that all airlines which currently serve Shannon International Airport on transatlantic routes receive particular assistance and encouragement to persevere retain and enhance their provision of with their respective services. In this regard it will be crucial to co-operate with each airline on the ongoing creation of demand for its service(s) both in the Irish market and the US-Canadian markets. The target for Shannon International Airport is to secure a 30% share of the direct transatlantic market between North America and Ireland and to achieve an appropriate sustainable level of year-round services to main US gateways.

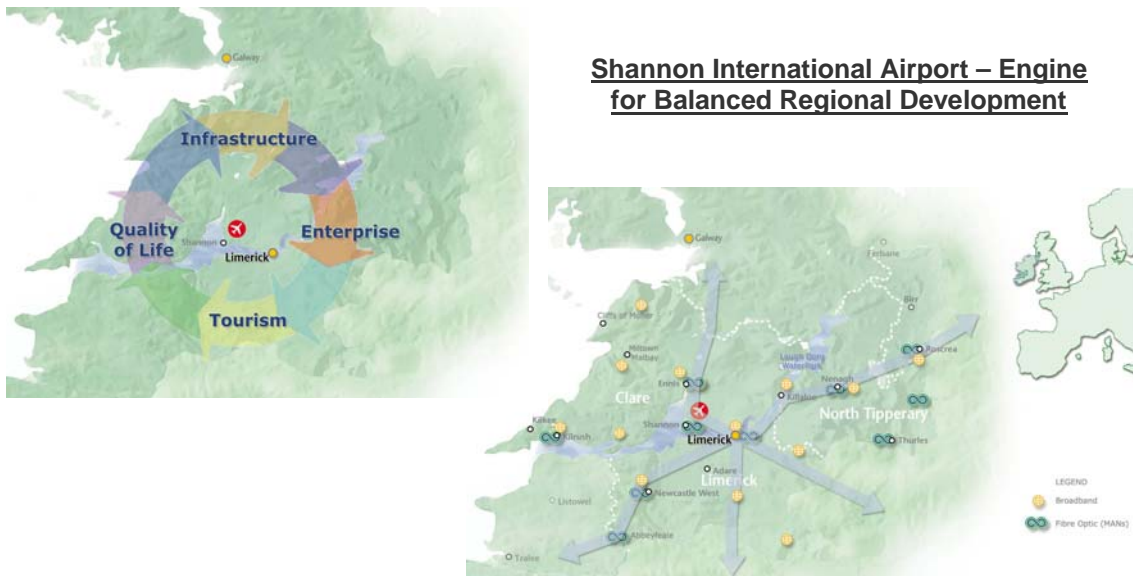
Specific promotional campaigns to generate sufficient demand, particularly in the winter off-peak season, will require significant funding over and above that which the airline can itself generate. This must be provided from external sources and will be directed at mainly business travel and conference promotion.

Furthermore, it will also be vital to have funds provided in order to encourage the provision of new services, particularly to additional US gateways. The costs and risks associated with new airline services are substantial, and significant funding will be required for Shannon to be able to compete in a deregulated EU-US market. Therefore, it will be critical that Shannon is in a position to move quickly and assertively towards the establishment of new services during the transition phase to full 'Open Skies', by having additional exchequer funds available to support airlines in launching such services.

This Tourism and Economic Development Plan proposes the following actions for implementation to ensure the continued viability of Shannon International Airport in the light of the introduction of the EU-US 'Open Skies' agreement:

- The Regions critical Infrastructure requirements need to be accelerated to ensure that Shannon International Airport's catchment area is expanded creating a vibrant market demand for transatlantic services.
- A 5-year action plan needs to be implemented immediately supporting Shannon International Airport in achieving a successful outcome to the introduction of 'Open Skies'. This 5-year action plan wishes to achieve the following:
 - An independent and financially viable Shannon International Airport.
 - Tourism Promotional Fund of €44m to be provided by exchequer funds and to be administered by relevant Tourism Agencies.
 - Route Promotion Fund of €9m for existing and new services to be provided from exchequer funds.
- An extension of the US Customs and Border Protection facility at Shannon International Airport to provide full Customs and Agriculture pre-clearance will provide an innovative and unique opportunity for the airport to considerably grow its transatlantic market. This Plan recommends that a full-clearance pilot programme be implemented before the end of 2007.
- A Regional Tourism Innovation Programme must be a key element of the new approach to tourism product development. There will be a continuing need to implement more innovative approaches to developing and marketing the tourism sector in the years ahead and a structured approach to promoting innovation will be essential.
- An international standard Regional Conference Centre located near Shannon International Airport is a key priority for the tourism sector in the medium term and would attract high yielding visitors to the Western Regions on a year-round basis

- The roles and responsibilities of the economic development agencies in the Shannon region, IDA Ireland, Enterprise Ireland, and Shannon Development, must be clarified so that the region can leverage maximum advantage from their expertise and record of accomplishment.
- An Enterprise Strategy with a strong focus on the twin aims of fostering indigenous business and attracting foreign direct investment must be developed. This must address the region's value proposition over and above infrastructure that will make business successful in this region. The Enterprise Strategy will be a platform for economic progress in this region thereby creating a virtuous cycle of growth and development that fosters employment, development of R&D and technology expertise and a vibrant year-round business market for Shannon International Airport.
- An Implementation Group needs to be set-up comprising National, Regional and Local representation from Public and Private sector with an 'Open Skies' Impact Review incorporated to monitor and evaluate the implementation of the proposals recommended in this plan.



The working group submits the aim of this Tourism and Economic Development plan for Shannon International Airport within the context of the introduction of 'Open Skies' is to the Minister for Transport and the Cabinet for endorsement and approval. by Ministers for Transport, Arts, Sport & Tourism and Enterprise Trade & Employment. The recommendations contained therein are proposed for inclusion in the next National Development Plan 2007-2013 and subsequent Operational Programmes.

APPENDIX A: EU-US 'OPEN SKIES' – CURRENT POSITION

Introduction

Irish airlines are restricted in to 5 US cities under the existing Ireland-US Bilateral arrangement but only serve four. Baltimore Washington is, according to Aer Lingus, uneconomical with the Shannon stop requirement in place.

Expanding services across the Atlantic is of great importance to the growth of Irish airlines and Irish tourism. For example, the Brattle Report for the European Commission estimates that full open skies between the EU and US would lead to a 10% increase in passenger numbers in Ireland, leading to a boost for the economy of between €41m and €99m per annum.

EU-US Aviation negotiations/Open Skies

The European Commission and US authorities concluded the EU-US Aviation negotiations on Friday 18 November 2005. The Agreement was considered by the Transport Council on 5 December 2005, where the text of the agreement received unanimous support. The Council observed that improvements in the US rules on ownership and control of airlines would be an essential element for a Stage One deal to be concluded. The US is revising its rules on ownership and control at present and expects to be in a position to conclude these rules in the near future. The matter will then go before the Transport Council for final approval.

The intention is that the EU-US Agreement will come into effect in November 2006.

Transitional Arrangements for Shannon

The Minister for Transport, Martin Cullen, met the US Secretary for Transportation, Mr. Norman Mineta, on Wednesday 9 November 2005, to negotiate transitional arrangements for Shannon, in the context of a successful EU-US aviation agreement.

The key features of the transition, reached after intensive negotiations, are as follows:

- No change in the Shannon stop arrangements (i.e., 1:1 ratio for Dublin/Shannon flights) until November 2006.
- Transitional period commencing Winter season (November) 2006, and finishing beginning of the Summer season (April) 2008 (which gives over two years of Shannon stop arrangements from now).
- During the transition period, the ratio of Dublin/Shannon flights will move from 1:1 to 3:1, so that for every one flight to/from Shannon, a carrier can provide three flights to/from Dublin. This ratio can be averaged out over the period of the transition.
- Irish airlines will have access to three additional destinations in the US from November 2006, over and above the four destinations currently being served.
- These additional 3 points will be nominated to the US later, and we have flexibility to change those cities during the transitional period.
- It was also agreed that there would be no restriction on code sharing into Ireland via points in the EU (this will facilitate Aer Lingus and American Airlines code sharing from Heathrow into Dublin).
- Cargo only services will not be subject to any Shannon stop requirement from November 2006.
- Full open skies between Ireland and the US from April 2008 in the context of an EU-US Agreement.

This transitional arrangement represents a very good outcome for Ireland having regard, in particular, to the very hard-line stance adopted by the US. It will be the only transitional arrangement in the proposed EU-US agreement.

Supporting Measures

- This transitional arrangement will be supported by assurances the Minister sought and obtained from Aer Lingus to maintain the current level of transatlantic traffic (circa 400,000 passengers pa) with regular year round scheduled services between Shannon and Boston and New York.
- In announcing the agreement reached with the US authorities last December in relation to a transitional arrangement for Shannon Airport in the context of the proposed EU/US 'open skies' the Minister for Transport gave an undertaking to prepare, in consultation with his colleagues, the Minister for Arts, Sport & Tourism and the Minister for Enterprise, Trade & Employment, a tourism and economic development plan for Shannon and the West of Ireland.

*Department of Transport
May 2006*

APPENDIX B: REGIONAL ENTERPRISE SUCCESS STORIES

1. Business Property and Environment Solutions

- Knowledge Network

The Shannon Development Knowledge Network⁹ brings business, education and innovation together to create Ireland's most dynamic and exciting world-class locations for living and working in the knowledge age. There are currently five locations within the Shannon Development Knowledge Network: Birr Technology Centre, Information Age Park Ennis, Kerry Technology Park, National Technology Park, Tipperary Technology Park, each dedicated to providing the resources and environment in which ideas and knowledge-based business are created, developed and succeed.

Shannon Development has created InnovationWorks, state-of-the-art business incubation centres, to stimulate entrepreneurial potential and to develop a sustainable enterprise culture in the Shannon Region. InnovationWorks facilities are located within each Shannon Development Knowledge Network location to support new technology and knowledge-based businesses which are dedicated to exploiting the potential of new, fast-growing markets.

Limerick Institute of Technology¹⁰, supported by Enterprise Ireland have recently opened a Business Incubation Centre on campus to foster the 'seamless transition from education to enterprise'. The facility will comprise incubator units and integrated dedicated research laboratory units for the commercialisation of LITs' R&D activity. Within five years LITMUS is expected to lead to the development of 20 sustainable sources of quality employment generating 75 local jobs of which 75% will be graduates. In ten years it is projected that LITMUS will have nurtured 40 sustainable enterprises generating 350 local jobs, spin-off 3-4 new enterprises on an annual basis and have 100 % collegiate occupancy from the graduate, postgraduate, research or academic staff segments.

- Westpark

Westpark Shannon¹¹ is a 40-acre world standard business campus located in Shannon adjacent to Shannon Free Zone, within easy reach of Shannon International Airport. Situated within a landscaped panoramic setting, the business campus will comprise seven towers of office and business property suitable for corporate headquarters, research and design, specialist manufacturing and specialist storage. A flagship development, Westpark Shannon represents an investment of over €160 million, that when completed will provide more than 1,500 employment places at the top end of the Knowledge and Information Technology market. Phase 1 of construction is complete and the parks first tenants take up occupancy in June 2006. The development includes a world-class Datacentre which will act as a key interface point between technology companies and major ICT service providers in the Limerick-Shannon economic corridor.

⁹ See <http://www.shannon-dev.ie/Business/KnowledgeNetwork/> for further information

¹⁰ See www.lit.ie for further information

¹¹ See <http://www.westparkshannon.com> for further information

2. R&D: Industry and the third level sector

- **University of Limerick**

The University of Limerick¹² is comprised of six academic colleges; business, education, engineering, humanities, informatics and electronics, and science.

Research is recognised as an essential component of the University's mission, with post-graduate students contributing significantly to the discovery of new knowledge and new understanding as exhibited for example by the LERO project which focuses on software development. The University enjoys productive relationships with many corporate partners, including those located on the Plassey Science Park which adjoins UL's campus of over 200 acres.

Undergraduate courses are offered through the format of co-operative education, which ensures that students gain practical, on-the-job experience in addition to the more traditional learning environment of the classroom and laboratory. This experiential learning, coupled with UL's emphasis on high quality teaching and learning, has resulted in demand for UL graduates by national and international employers. UL has one of the largest cooperative education programmes in the European Union. Some 2,000 students are placed annually under the Cooperative Education programme with a network of over 1,600 employers. Some 30% of placements are secured internationally; primarily in Europe, North America and Asia.

UL's dedication to education, research and linkages with industry and the business community is demonstrated by the Centre for Entrepreneurial in the Kemmy Business School, the University Technology and Enterprise Development Unit (UTED) and the Programme for University Industry Interface (PUII).

- **Tipperary Institute**

Tipperary Institute¹³ provides courses in three departments; Information and Communications Technology, Business, and Sustainable Rural Development. Specialist staff at Tipperary Institute, whilst conducting activities normally seen as academic such as lectures, tutorials and research, also provide assistance, advice, mentoring and consultancy to a wide community and business client base in the region.

- **Limerick Institute of Technology**

Limerick Institute of Technology¹⁴ is comprised of the following academic schools; Art & Design, Business & Humanities, Built Environment, Science Engineering & Information Technology. LIT's Strategic Plan 2006-2010 identifies ten strategic goals to deliver its mission to prepare "*learners for fulfilling and challenging futures, fostering the professional, intellectual, social, cultural and personal development of the individual. The hallmark of our educational philosophy is active learning through a fusion of theory and practice. We provide third and fourth level education, training and research, playing a pivotal role in the economic and socio-cultural development of our region.*" Strategic goal number 5 focuses on Research and Development with a commitment to further develop and nurture research capacity in niche areas and to offer integrated support in R&D leading to business creation, growth, technological development and innovation in the Mid-West region.

¹² See www.ul.ie for further information

¹³ See <http://www.tippinst.ie> for further information

¹⁴ See www.lit.ie for further information

3. Enterprise Led Initiatives

- **Shannonsoft**

ShannonSoft¹⁵ is a business network of software-performing organisations in the Shannon region, fostering communications and awareness between software companies of all sizes, the IT elements of non-software companies, and support agencies. The network focuses upon issues of common interest to this diverse membership, including:

- attraction and retention of software staff
- quality, project management, and process management
- contracting and sub-supply options
- education, training, skills and standards

- **Supply Network Shannon**

Supply Network Shannon (SNS)¹⁶ is an Industry-led initiative aimed at representing, promoting, developing and connecting sub-supply companies in the Shannon region of Ireland. SNS works with and for all engineering and electronics sub-supply companies in the Shannon region and helps to reinforce the region's position as a world class source of sub-supply products and services. The network presently focuses on three main areas of activities: business issues such as supply chain management (SCM), technical issues relevant to engineering and electrical manufacturers and ICT usage. In its initial phase, SNS concentrated on two core activities, training and promotion.

- **FIT Mid-West**

FIT¹⁷ (Fasttrack into IT) is an industry driven and Government supported initiative, which assists employers to meet ICT related skills needs, while creating training and employment opportunities for marginalised job-seekers. The first FIT Mid West programme, PC Maintenance & Servicing, commenced in November 2005 in Limerick City. Course participants will gain A+ and ECDL certification and will gain positions in helpdesks, customer service, network support, administration, pc maintenance and technical support when they graduate in July 2006. All students have already completed site visits and internships with a variety of Mid West companies including Dell, Analog Devices, O2, E-Net, Eircom, University of Limerick, Sarsfield Credit Union, Sercom Solutions and Our Lady of Lourdes Centre.

- **PLATO**

The PLATO¹⁸ network in Ireland currently consists of 130 parent companies and over 1500 SMEs. It involves large parent companies and SMEs participating in networks, which provides owner managers with facilitated group learning, specialist expertise and advice, networking opportunities and business development training. The Enterprise Boards in conjunction with IBEC propose in 2006 to replicate the PLATO business support network in the Midwest.

- **Meet Limerick-Shannon**

'Meet Limerick-Shannon' is a private/public sector co-operative initiative for the Limerick and Clare area¹⁹ that aims to build on the reputation of counties Clare and Limerick as an excellent destination for meetings, incentives, conferences, exhibitions and sporting events.

¹⁵ See <http://www.shannonsoft.ie/> for more information but site has not been updated since Nov 2002

¹⁶ See www.snshannon.com/ for further information

¹⁷ See www.fit.ie for further information

¹⁸ See www.plato.ie for further information

¹⁹ See <http://www.meetlimerickshannon.com> for further information

MID-WEST REGIONAL AUTHORITY

Friar Court,
Abbey Street,
Nenagh,
Co. Tipperary.

Tel: 067 33197

Fax: 067 34401

Email: mwra@eircom.net

Web: www.mwra.ie