

Submission to the National Planning Framework

15th March 2017



etb
Bord Oideachais agus Oiliúna
Luimnigh agus an Chláir
*Limerick and Clare
Education and Training Board*



Comhairle Contae an Chláir
Clare County Council



**LIMERICK INSTITUTE
OF TECHNOLOGY
INSTITIÚID TEICNEOLAÍOCHTA
LUIMNIGH**

1.0 Introduction:

Clare County Council, Limerick Institute of Technology, and the Limerick and Clare Education and Training Board working in collaboration are pleased to make a joint submission to the National Planning Framework (NPF).

This joint submission advocates for the identification in the National Planning Framework of a collaborative approach to the provision of educational institutes and campus aligned to the provision on-site of complementary enterprise centres. Moreover the submission requests that NPF identifies and positively promotes the provision of a joint model of a 3rd level institution and associated enterprise campus in Ennis, in order to make a significant contribution to the Mid-West Limerick City Region and balanced regional development. It is requested the NPF positively identifies a Co-Located Campus for Further Education, Higher Education and Enterprise Development in Ennis.

2.0 Background

2.1 Clare County Council, Limerick Institute of Technology, and the Limerick and Clare Education and Training Board

Clare County Council is the statutory authority for the provision of land-use planning, including the implementation of the NPF, together as a driver and agent of economic development in the County Clare and the Mid-West region. Moreover in conjunction with the LEO, Clare County Council is keen to develop its business and enterprise development capacity in Ennis, whilst achieving the Council's objective to promote the provision of facilities for adult education and enhanced social, community and cultural facilities for the population of Clare.

Limerick Institute of Technology is one of 13 institutes that are members of the Technological Higher Education Association (THEA). The Institute has four campuses in Limerick city, one in both Thurles and Clonmel and a regional learning centre

in Ennis, County Clare. The LIT Ennis Learning Centre has been operating successfully since 2009, providing regional access to higher education programmes in Ennis. The continued expansion of LIT facilities and campuses into Clare and Tipperary provide for a high-skilled and educated workforce throughout the region and attracting economic investment and retaining the vibrancy of local population.

In 2013 three VECs, City of Limerick VEC, County Limerick VEC and Co Clare VEC were amalgamated to form the Limerick and Clare Education and Training Board (LCETB). LCETB is a statutory authority which has responsibility for education and training, youth work and a range of other statutory functions. LCETB manages and operate second level schools, further education colleges, and a range of adult and further education centres delivering education and training programmes.

2.2 Ennis

Ennis is the largest town in Munster and the 6th largest town in Ireland. Ennis is a large county town with significant advantages in tourism, food and music as well as a wide range of small businesses across many sectors that support the county's economy and population. Ennis also has a hospital and well developed social services. The current population of Ennis is 25,000 and in the context of the NPF, Ennis has significant capacity to grow population to 2040 and beyond due to its location and connectivity by motorway, rail and accessibility from Shannon Airport.

2.3 Co-location of Education and Enterprise

International experience of the development of universities and, in particular, those universities whose strategic mission focuses on knowledge transfer, indicates that their hinterland adapts quickly to become a focus for development arising from, and complementary to, the existence of the university. The potential of such hinterlands in terms of economic and social development is significant.

3.0 NPF and Requirement for Co-Located Campus for Further Education, Higher Education and Enterprise Development in Ennis

Ireland's worldwide reputation for high quality education is built on the solid foundation of many centuries of commitment to educational excellence. The Mid West Limerick City Region combines this rich history with being one of the most globalised regions in the world and a range of internationally renowned 3rd level institutes.

The provision of a Co-Located Campus for Further Education, Higher Education and Enterprise Development in Ennis can make a significant contribution to the City Regions of Limerick and Galway and importantly can stimulate and sustainably develop the enterprise capacity and rural economy of the County Clare and the wider region. The Eds & Meds theory of development suggests that the single biggest public influence on development of population centres is where education and medical services are located. The availability of further education and higher education facilities at a range and variety of locations and sizes is a key selling point for attracting families and inward investment to the region. The support in the NPF for a co-located campus in Ennis will provide accessible, flexible and accredited education and economic opportunities for the people of Clare and the wider region.

3.1 Evidence based Justification

The Clare County Development Plan 2017-2023 sets out a target population growth for Ennis as c.33,000 by 2023 and has zoned sufficient land accordingly. Moreover there is significant capacity for further growth upto 2040. The Ennis Co-located Campus will provide a strategically important component for the further developing of Ennis over the longer term. In our justification of a co-located facility it is important to confirm that market size and market demand will continue into the future.

3.1.1 Feasibility - Market Size

The market size in Ennis is based on the 2011 Census. The population of Clare was confirmed as 117,196 with the highest concentration of population in Ennis. 22% of the population was under 14 Years in 2011, above the national average of 20%. This strong youth demographic is starting to reach higher education age. Ennis had a population of 25,360 in the 2011 Census. This places Ennis well above the population range needed to support a higher education campus. The table below compares the population of Ennis to other towns with Institute of Technology or higher education campus operations having Enterprise Ireland development centres. In terms of market size this table of population comparisons demonstrates that Ennis is strongly positioned to support a co-located education and enterprise campus:

TOWN	POPULATION 2011
Ennis	25,360
Tralee	23,693
Carlow	23,030
Athlone	20,153
Wexford	20,072
Letterkenny	19,588
Sligo	19,452
Clonmel	15,793
Castlebar	12,318
Thurles	7,933

Source: Central Statistics Office Census 2011

In addition to the large population in Ennis, nearby towns such as Clarecastle, Tulla and Ennistymon have populations close to 1000 in each town. Despite the recession that saw falling populations in counties Mayo, Sligo and Donegal, the population of Clare has continued to grow. Between the 2011 and 2016 census the population of County Clare grew by 1.2% (1,431) to the current population of 118,627.

The Schools Examinations Commission confirms that in 2015 the number of students sitting the Leaving Certificate in County Clare was 1,368. Other students with Clare home addresses go to school outside the county, mainly in Limerick and Galway. The CAO data confirms that in 2015 the number of Leaving Certificate applicants from County Clare was 1,378. We can conclude that almost all Leaving Certificate applicants from Clare submit a CAO application and aspire to access higher education.

In 2016 there were 20,997 new startup companies set up in Ireland, a 20 year high and an 8% increase on 2015 based on a study by Vision-Net.ie¹. Based on 2014 CSO figures, Clare had 211 active ICT companies employing 787 people (average of 3 people per company), 465 active manufacturing companies employing 6,465 (average of 13 people in each company), 765 active professional, scientific and technical activity based companies employing 1,240 (an average of 1.5 people per company) and 125 active enterprises in the financial and insurance services employing 674 people (averaging 5.5 people) and more companies in other categories. The empirical evidence and data suggests there is an opportunity in Ennis to help support a growing startup ecosystem.

3.1.2 Feasibility – Market Demand

Further education participation in Clare is spread across the county to support local communities. As a result, the range of FE programmes is limited at each location. Higher education participation in County Clare is estimated by the HEA at 59%, below the national

¹ <http://www.vision-net.ie/>

average of 65% participation in higher education. Further analysis confirms that this participation is skewed by the level of Clare population living on the borders of Limerick and Galway. In the areas serviced by those cities higher education rates are at national average levels. As one moves into central Clare, East Clare and West Clare, participation rates in higher education are lower, estimated at 43%. Socio-economic profile and distance from a higher education institution are known determinants of higher education participation. The geographic pattern of participation in Clare is consistent with this. The County and in particular Ennis is ideally placed to maximize the opportunity of a co-located facility. Ennis, centrally located within Clare and accessible by public and private bus networks, rail and motorway and national road access from within and outside the county is sustainable location for the location of the further education campus.

Determining demand within the market for further education and higher education in Clare is based on a number of calculations. The CAO Applications number of 1,378 in 2015 is a strong indicator of market demand. We know that 813 of these applicants, or 59%, already continue to higher education. Hence, the currently unmet annual demand for higher education in Clare, as evidenced by CAO applications, is the 41% of CAO Applicants who do not currently continue to higher education, being 565 applicants each year. Ennis co-located campus would aim to attract this unmet market, as well as attracting international students to niche programmes. In addition, the existing further education provision in Ennis would be accommodated on the co-located campus with a range of start-up enterprise and business activities, to offer a full campus operation growing to up to 1000 FE and HE students over time.

It is realistic to expect that this unmet annual demand of 565 CAO applicants would consider LIT-Ennis, though there is no guarantee that all would attend. It is reasonable to assume that higher education provision in Ennis would see higher education participation in central County Clare rise from 43% to the national participation rate of 65%. On this basis, 303 students would apply to higher education in Ennis each year across a portfolio of programmes. This estimated demand is consistent with that currently being achieved in LIT

Thurles across a limited portfolio of programmes, in a town with a much smaller population and similar rural hinterland. Allowing for the limited portfolio of programmes that might be offered in Ennis initially, the numbers above suggest a sustainable enrolment growth in the region of 200 higher education students per annum, as the higher education programme portfolio is developed over time.

National demographics at age 17, based on childbirth numbers in previous years, show continued growth in the further education and higher education age cohorts up to 2028. The table below shows Department of Education statistics for Numbers of Second-Level Pupils by County. This comparative data again confirms that County Clare offers a strong pipeline for education demand. The Limerick & Clare ETB are already planning for growth in secondary school demand in Clare. For example, a large new school planned for Ennistymon will see secondary provision in that town grow from a 260 to a 700 pupil school. The table below shows the current second level numbers by county:

County	Number of Second-Level Pupils by County
Limerick	16,492
Tipperary	14,042
Donegal	12,854
Kerry	11,178
Waterford	9,642
Clare	8,114
Carlow	6,053
Sligo	5,416

Source: Department of Education & Skills: Organisation & Current Issues 2016

HEA statistics for 2014/15 confirm that there were 1,601 students from Clare, including adult learners and immigrants to Clare, across all years in Institutes of Technology. 895 (56%) of these students were attending LIT, 274 (17%) were attending GMIT, 106 (6%) were attending IT Tralee and 88 (5%) were attending CIT. There were 2617 students from Clare in Universities in 2015, including 1209 in UL, 710 in NUIG and 328 in UCC. With 4218 students travelling out of the county to access higher education, the potential for a strong further education and higher education offering in Ennis would appear self-evident.

With 4218 students in higher education from Clare, one can assume some stay living in Clare and commute and others move while they are studying. LITs first destinations reports suggest that a vast majority of students who study in the region remain in the region. There is a record high number of startups in Ireland recorded in 2016 (more than 20k) suggesting a rising interest in entrepreneurship as a career path. LIT also works annually with a number of entrepreneurs from Clare in particular from Ennis and the surrounding region with some basing themselves in Ennis. This initial research suggests that there is a need for more supports in Ennis and the surrounding area that could support an investment into LIT Enterprise activity in Ennis in terms of incubation, acceleration type programmes, mentoring and startup ecosystem building support activity. Additionally, supports in similar size county towns from other Institutes of Technologies are proving to be successful. However these centres are mostly 'economic builders' and are therefore funded by key stakeholder organisations and/or philanthropic donations in addition to rental activity rather than being fully self-financed. Certain criteria on the building and resources as well as the demographic contribute to the successful creation of a self-financed incubator or accelerator. It is a possibility that the other activity in the co-located campus could financially support some of the enterprise activity.

LIT already engages in Limerick with entrepreneurs from County Clare, a number of them specifically in Ennis. LIT's enterprise development work in county towns like Thurles,

Clonmel and Croom has demonstrated an appetite for incubation support for business start-ups as well as scaling companies. Growing start-up figures nationally and discussions with the LEO in Clare suggests that supporting entrepreneurial activity in terms of incubation in an actively supported centre in Ennis would generate start-up success, growth and sustainability.

4.0 Conclusion

Ennis is the largest town in Munster and the 6th largest town in Ireland and has significant capacity for sustainable growth to 2040 and beyond. This joint submission from Clare County Council, LIT and LCETB has advocated that the National Planning Framework should identify Ennis for a Co-Located Campus for Further Education, Higher Education and Enterprise Development to provide a strategically important component for the further developing of Ennis and the Mid-West Region over the longer term.

Working in collaboration, the 3 agencies have the vision, capacity, statutory remit, governance and proven track record to coordinate and drive the delivery of a Co-Located Campus in Ennis and contribute to implementing the NPF and achieving balanced regional development, creating sustainable communities and increasing the quality of life for all who live, work and visit the Ennis, Co. Clare and Mid-West region.