County Tipperary
Local Economic Plan
2015 - 2020

Comhairle Contae Thiobraid Árann
Tipperary County Council

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CONTENTS

Glossary

CC	Chamber of Commerce
CEBs	County Enterprise Boards
CSO	Central Statistics Office
CTC	County Tipperary Chamber of Commerce
ETB	Education and Training Board
EI	Enterprise Ireland
FI	Fáilte Ireland
FTTH/FTTB	Fibre to the Home/Fibre to the Building
HPSU	High Potential Start-Up
IDA	Industrial Development Authority
KPI	Key Performance Indicator
LIT, Tipperary	Limerick Institute of Technology
LA	Local Authority
LBG	Local Business Groups
LCDC	Local Community Development Committee
LDC	Local Development Company
LDMSG	Lough Derg Marketing Strategy Group
LEO	Local Enterprise Office
MANS	Metropolitan Area Networks
NGA	Next Generation Access
NBP	National Broadband Plan
POWCAR	Place of Work Census of Anonymised Records
PRAs	Public Realm Areas
REI	Retail Excellence Ireland
REDZ	Rural Economic Development Zones
RDP	Rural Development Programme
SICAP	Social Inclusion & Community Activation Programme
SPC	Strategic Policy Committee
TCC	Tipperary County Council
TCI	Town Centre Initiative
TFPN	Tipperary Food Producers Network
TTC	Tipperary Tourism Company
TEA	Tipperary Energy Agency
TI	Tourism Ireland
UL	University of Limerick
WIT	Waterford Institute of Technology

Co. Tipperary Economic Plan 2015 – 2020

1. Introduction & Background

Ireland has gone through a considerable level of upheaval in recent years as a result, in part, of over reliance on some unsustainable economic policies. This has had a detrimental impact on the broader community and in particular has resulted in a significant level of disruption causing extremely high levels of unemployment; significant reduction in service provision and very high levels of emigration.

Whilst the impact has been extremely negative, it has resulted in the Country reassessing its economic policies and the role of economic development in the Country.

It is realized that a critical component of any sustainable community is the ability of that community to participate in economic activity appropriate to their needs, abilities and capacities. For any economic strategy of a county or country to be effective and sustainable, it must be on the basis that all persons are afforded an appropriate opportunity to engage in economic activity which will add value to the quality of life of its citizens.

In the context of the Local Economic and Community Plan (LECP), the objective is to promote a more integrated sustainable and targeted approach to addressing the strategic economic and enterprise development needs in a way that builds on the strengths and opportunities of the County and by ensuring that there is a prospect of economic opportunity for all.

2. Methodology

The process for the preparation of the community element of the LECP was undertaken as part of the overall LECP preparation. The Tipperary LECP is underpinned by a number of guiding principles which include

- Sustainability
- Promotion and mainstreaming of equality
- Community development principles
- Maximizing returns from resources by avoiding unnecessary overlap and duplication and by achieving synergies through co-operation and collaboration
- Participative planning
- Community consultation and engagements
- Accessibility and ownership

All sections of the Plan have been developed with these underlying principles as a key guiding framework.

A Steering Group, consisting of representatives of the Local Community Development Committee (LCDC) and the Economic (ESPC) was set up in order to maximize the level of integration and co-ordination during the preparation process so that any potential difficulties of overlap or duplication could be avoided. It also ensured maximum benefits of the community consultation processes.

2.1 LECP Process

The process for the development of the LECP incorporated three phases as follows:

3.1.1 Phase 1

This involved:

a) seeking written submissions on the issues of concern from the broader community

b) engagement with the principal Agencies which operate in the county to identify their views of the key framework priorities as suggested by their experience and knowledge and their understanding of what would be acceptable within the context of Government priorities and policies. This stage of the process was important as it should maximize the likelihood that the actions identified in the Plan would be achievable and realistic since they would lie within the strategic priorities of the principal funding and approval agencies.

Based on these key framework priorities, the broader community was consulted to review the priorities as identified by the agencies from a community perspective and to identify potential additional priorities. Key appropriate agencies with a national/regional remit were also consulted during this stage.

A statistical evidence based assessment was then undertaken to evaluate the priorities which were identified in the above process. Any new additional areas which were suggested through the evidential assessment but which did not come through the agency and community processes were also added to the draft list of Framework Priorities and the stated targets for each Priority was set in line with Government targets. The Advisory Committee, a structure made up of representatives from the SPC for Economic Development and the LCDC, considered same and recommended their adoption to both the SPC for Economic Development and the LCDC.

3.1.2 Phase 2

Following the sign off on the Framework Priorities by the LCDC and the SPC for Economic Development, a set of strategic actions and relevant KPI (key performance indicators) were drawn up which would assist in meeting the individual Framework Priorities. This draft document was adopted by the relevant structures and went out for further consultation with the broader community and relevant national/regional agencies. The feedback received from this process resulted in additional changes to this Economic section. During this phase, the draft Economic section was commented upon by the LCDC, the Municipal Borough and District Councils and the Regional Assembly.

3.1.3 Phase 3

The final phase involved the integration of the economic, social inclusion and community elements together to provide one all county integrated LECP which was considered and adopted by Council.

3.2 SEA Screening & Equality Proofing Exercises

During all of the phases, an SEA (Strategic Environmental Assessment) Screening process was undertaken to ensure that there were not significant adverse environmental issues arising from the actions or priorities identified. In addition, an equality proofing process was undertaken to ensure that there were no adverse or unexpected impacts from an equality perspective (Appendix 2).

3.3 LECP Priority Constraints

Based on the above methodology and processes, the intention of the LECP is to concentrate only on those actions where cooperation and collaboration amongst local agencies would deliver better services to the people of Tipperary.

It is also important to stress that not every issue or every challenge identified through the process has been incorporated into the Plan. As a six year plan, only those actions which were highlighted as key priorities and which also required the combined action of two or more agencies have been included in this document. The expectation is that all agencies will continue to deliver on their own core areas of activity (which will be wider than the remit of this document) but that included in their core area of activity are the above priorities which must be included and where resources and attention must be committed and included.

3.4 Key Economic Issues

From the above methodology a number of key economic issues were identified as affecting economic recovery and growth in the county. These included the need to:

- Create appropriate economic development opportunities throughout the county in order to address rural economic decline and regional imbalances.
- Address key economic infrastructural deficits in the county. Particular reference was made to the provision of high speed broadband and enhancement of transportation links on a regional and county basis.
- Increase the number of enterprise start-ups and grow the microenterprise sector to scale as appropriate.
- Support the development of emerging sectors or sectors with further potential such as tourism, food, multi-media and agri-tech while also working with vulnerable economic sectors to mitigate any negative impacts on the local economy. Sectors identified as being vulnerable included the retail and construction sectors.
- Support enterprises to improve energy efficiency, increase use of renewable energy, and grow the renewable energy sector
- Ensure the workforce meets current and future employment skill requirements
- Maximise the potential of Co. Tipperary as a location for investment through branding and marketing of the county.

Particular sectors were identified as areas where Tipperary has potential strengths or where there are significant opportunities. These include tourism; food; agri-tech; and the digital, gaming and multi media sectors. During the prcess of the LECP development process these sectors were further assessed and analysed to validate their relevance to the county and what, if any actions, could be progressed.

In addition, the LECP process identified the need to compile economic data at local level in order to establish benchmarks and subsequently monitor and evaluate progress on the LECP Framework Priority targets and and actions.

4. Key Policies – EU, National & Regional Policies

4.1 EU and National Policies

A number of EU, and national policies and strategies are particularly relevant to the Local and Economic Plan. These include:

4.1.1 Europe 2020

Europe 2020, which is the EU's current growth strategy, aims to achieve a smart, sustainable and inclusive economy throughout Europe. The European Union has set five ambitious objectives to be reached by 2020. Each Member State has adopted its own national targets in each of these areas. Concrete actions at EU and national levels underpin the strategy.

Europe 2020 Headline Target	National 2020 Target –Reform Programme
1. Employment • 75% of 30-64 year olds to be employed	**1. Employment** • 69% – 71% of 30-64 year olds are to be employed by 2020 (requires 0.6% increase per annum)
2. Research & Development • 3% of the EU's GDP to be invested in R&D	**2. Research &Development** • 2% of Ireland's GDP is to be invested in R&D
3. Climate Change & Energy Sustainability • Greenhouse gas emissions 20% (or 30% if the conditions are right) lower than 1990 • 20% of energy from renewables • 20% increase in energy efficiency	**3. Climate Change & Energy Sustainability** • Greenhouse Gas emissions to be 20% lower than 1990 • 16% of energy from renewable • 20% improvement on energy efficiency savings
4. Education • Reducing the rates of early school leaving below 10% • At least 40% of 30-34 year olds completing third level education	**4. Education** • Early School leaving reduced to 8% • 60% of 30-34 year olds completing third level education
5. Fighting Poverty & Social Exclusion • At least 20 million fewer people in or at risk of poverty and social exclusion	**5. Fighting Poverty & Social Exclusion** • At least 200,00 fewer people in or at risk of poverty and social exclusion

4.1.2 Horizon 2020

On January 1, 2014, the European Union's new research and innovation programme, Horizon 2020, took effect. It is the new financial instrument implementing the Innovation Union, and is designed to make it easier for researchers and businesses, including SMEs, to collaborate on projects. With a budget of around €70 billion, Horizon 2020 will be used to boost research and innovation under the programme's three pillars:

- The Excellent Science Pillar (over €24 billion) to help fund the European Research Centre, vital infrastructures and future and emerging technologies.
- The Societal Challenges Pillar (€31 billion) to help ensure research is directed at areas of most concern to citizens and business such as health, climate, food, security, transport and energy.
- The Competitive Industries Pillar (€17 billion), an innovative element of Horizon 2020, offers specific supports for SMEs and for enabling industrial technologies - nanotechnologies, biotechnologies and ICT.

4.1.3 Research on SMEs & Microenterprise in Europe

- Over 20million SMEs in Europe which represents 99.8% of the total number of enterprises.
- Sector employs two thirds of the total workforce and generates approximately 58% of total gross value added within the non-financial business economy (Eurostat 2014 – The Structural Business Statistics Database).
- Very few SMES grow beyond the microenterprise stage - 92% have less than 10 employees.
- EU SMEs operate in services, trade, Industry and construction sectors.
- 50% of SMEs across the EU27 in terms of number and employment are heavily reliant on domestic demand – construction, wholesale & retail, accommodation & food services.
- Since the downturn SMEs have operated in a three-speed Europe – with Ireland, Spain & Portugal having a slow speed of recovery; France, Netherlands and the UK having an average recovery speed; and Sweden and Germany having a fast recovery (*How to be a Stand out SME, Mazars 2014*).

4.1.4 Action Plan for Jobs

Ireland's key employment strategy is the multi annual *Action Plan for Jobs* which aims to have 100,000 more people in work by 2016 and 2 million people in work by 2020. The Action Plan for Jobs process started in 2012 with an aim of supporting enterprise in the creation and maintenance of jobs. This is to be achieved through entrepreneurship support, SME innovation which is a key priority to drive new business creation, expansion and employment and the removal of operational barriers. In tandem with Europe, the private sector in Ireland consists largely of an indigenous SME base, with 99% of businesses classified as SMEs.

Since the launch of the *'Action Plan for Jobs 2012'* unemployment fell to 13.1% in 2013 from a high of 14.8% in 2011. Also, there was a growth in employment in 2013 for the first time in five years. The last two quarters of 2013 and the beginning of 2014 saw growth in full-time employment and in the number of self-employed. By the end of 2014 the unemployment rate had fallen to below 10.6%.80,000 additional jobs had been created in the private sector by 2015 – 15,000 of which were created by the IDA and EI in 2014 alone.

The '*Action Plan for Jobs 2015*' promoted the development of Regional Enterprise Strategies in order to address more balanced regional development. To support implementation of these strategies, Competitive Funding Initiatives of up to €25 million are being introduced to promote innovative collaborations, support entrepreneurship and innovation in the regions, and exploit regional competitive advantage.

Challenges

- The concentration of Irish exports in a small number of sectors and the domination of foreign-owned firms in Ireland's trading activities creates additional vulnerabilities in Ireland's trading profile.
- FDI is largely responsible for Ireland's high participation in global value chains and despite some impressive successes in the agri-food sector, domestic inputs to third country exports remain well below the OECD average, reducing the positive spill-over into the economy.

- Developing greater linkages between domestic firms and multinationals based here, as well as increasing trade from domestic firms to foreign markets, is dependent on the ability of Irish owned firms to enhance their competitiveness and outperform rival firms from overseas.
- Ireland's competitiveness remains a challenge - Ireland dropped one point from 15th place to 16th place in World Competitiveness Rankings 2015 (May 2015)

4.1.5 Entrepreneurship in Ireland Policy Statement 2014

Entrepreneurship is a key element of successful economies. Research published by the Central Bank in 2013 indicated that 67% of new job creation comes from companies in their first five years of business. The *Entrepreneurship in Ireland Policy Statement 2014*, building on the work of the Entrepreneurship Forum, sets out a framework to make Ireland one of the most entrepreneurial nations in the world – a world class environment in which to start and grow a business.

The *Global Entrepreneurship Monitor* (GEM),which provides international comparative information on entrepreneurship, shows in its 2013 report that in terms of total early stage entrepreneurial activity (TEA) Ireland ranked second across the EU-15 and ninth across the EU-28. TEA peaked at 9.8% in Ireland in 2005; fell to 6.1% by 2012; and rose to 9.2% by 2013. In addition the *Global Entrepreneurship & Development Index* (GEDI) shows that Ireland is performing relatively well in such entrepreneurship characteristics as human capital, internationalisation and encouraging high-growth companies. However, there are a number of areas which require attention - these include opportunity perception, the proportion of female entrepreneurs, fear of failure, risk capital and start-up skills. As Ireland is performing strongly in terms of international benchmarks as measured by the GEDI its profile is that of an innovation driven economy – an economy biased towards high value added industries.

The *Entrepreneurship in Ireland Policy Statement 2014* has set the following targets for the next five years:

- Increase the number of start-ups by 25% (3,000 more start-ups per annum)
- Increase the survival rate in the first five years by 25% (1,800 more survivors per annum)
- Improve the capacity of start-ups to grow to scale by 25%.

Underpinning the achievement of these targets is an entrepreneurship ecosystem, facilitated by government, which incorporates the following key elements:

1. Culture, human capital and education
2. Business environment and supports
3. Innovation
4. Access to finance
5. Entrepreneurial networks and mentoring
6. Access to markets.

Various actions to achieve the above are outlined in the 'Entrepreneurship' section of the *Action Plan for Jobs 2015.* In terms of local policy it should be noted the GEM Report 2013 states that 50% of early stage entrepreneurs run or intend to run their new business from separate premises and 40% initially start their new business from home.

4.1.6 Climate Change & Energy Sustainability Policy

- Focus in Europe is towards a move to a low-carbon economy, to be achieved through increased use of renewable energy, development of green technologies, development of a modernised transport sector, and the promotion of energy efficiency.
- Ireland is legally obliged to ensure that by 2020; at least 16% of all energy consumed in the state is from renewable sources, with a sub-target of 10% in the transport sector (*Directive 2009/28/EC*).

- The *National Energy Efficiency Action Plan* to 2020 stresses that improving Ireland's energy efficiency is an essential element of Ireland's energy policy. The Plan incorporates 97 actions to achieve a 20% reduction in energy demand which will require considerable investment.
- Ireland's per capita aggregate Green House Gas (GHG) emissions are the second highest in the EU (50% higher than the EU average) and its CO_2 emissions per capita are the 10^{th} highest.

4.1.7 Solas Further Education & Training Strategy

The *Solas Further Education & Training Strategy 2014 - 2019* aims to create a further education and training (FET) system in Ireland which will support economic development, increase social inclusion, and meet the needs of all learners, communities, and employers who engage with FET. The five strategic goals of the strategy are:

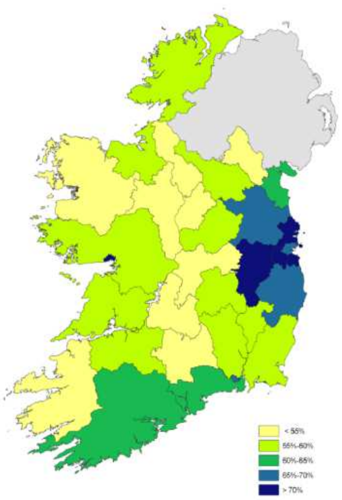
- Address the future needs of learners, jobseekers, employers and employees
- Support the Active inclusion of people of all abilities, with special reference to literacy & numeracy
- Quality Provision of Education & Training Programmes
- Integrated planning & funding on the basis of needs and evidence of social & economic impact
- Ensure learning path leading to agreed employment, career, development, personal & social options.

4.1.8 National Broadband Plan

Under the EU Commission's *Digital Agenda Europe 2010* there was a requirement of all EU governments to publish National Broadband Plans by 2012 which would outline each government's plans to facilitate high speed broadband targets. Targets set by the EU were:

- Basic broadband available to all by 2013
- Speeds of 30Mbps to all citizens by 2020
- 50% of EU households subscribing to speeds of 100Mbps by 2020 subject to demand.
- A minimum of 30Mbps available to all.

Ireland lags behind the EU and OECD average with regard to total fixed broadband take-up (excluding mobile). According to EU Commission figures at the end of 2010 fixed broadband penetration reached 23.3% in Ireland, while the EU-27 average was 26.6% of population. Fibre accounts for only 0.5% of connections compared to 9.6% for the OECD.



Households with Broadband - Census 2011

In Ireland's *National Broadband Plan 2012* (NBP) the following targets were set for the provision of high speed broadband:

- 70 Mbps – 100Mbps available to at least 50% of the population with a majority having access to 100Mbps
- At least 40Mbps, and in many cases much faster speeds, to at least a further 20% of the population and potentially as much as 35% around smaller towns and villages
- A minimum of 30Mbps available to all.

To date broadband providers have identified plans for commercial provision of Next Generation Access (NGA) by the end of 2016 costing €2.5 bn. An interactive map showing commercial provision by 2016 and state intervention has been developed. Examples of commercial provision include:

- Eircom rolling out a €400m investment in NGA Fibre Network that offers speeds of up to 100Mbps to 800,000 addresses with planned coverage of 1.4m addresses by 2016
- UPC has invested over €500m in upgrading its cable network. Over 700,000 homes have access to minimum broadband speeds of 120Mbps and up to 200Mbps. Businesses can access speeds of 500Mbps.
- Mobile operators have launched 4G high speed mobile broadband services.
- Sky has entered the market & there is increased investment by fixed wireless operators.

Central to the NBP will be fibre build-out to locations identified as having no existing or planned fibre network. State intervention will ensure that fibre will be delivered to access points for homes and businesses where service providers can use the fibre to provide high speed broadband to end users.

The DCENR has undertaken a comprehensive mapping process which shows areas where the commercial sector will provide NGA and areas where there is a requirement for state intervention. The map is now available on http://www.broadband.gov.ie/. The mapping process has identified 2.3m premises in the state. It is expected that 1.6m of these premises will have NGA provided by the commercial sector and 700,000 will require government intervention (100,000 commercial & 600,000 residential) to have NGA provided e.g. small villages, rural ribbon developments, and rural one-off houses.

The DCENR called for submissions by 12th February 2015 on the following: refined definition of NGA, strategic connection points, further submissions from operators on planned networks by 2020, NGA backhaul design etc. A Draft Implementation Plan will be published for public consultation by mid 2015. This will be followed by: EU State Aid Notification – November 2015; Procurement – 2016; Commence Implementation – late 2016 with a 2020 completion date.

4.1.9 Food Wise 2025

The agriculture and food industry accounts for 9% of employment and 10% of exports in Ireland. As much as 65% of manufacturing exports by Irish owned companies are estimated to consist of food and drink.

Growth projections under Food Wise 2025 are:

- Increasing the value of agri-food exports by 85% to €19 billion
- Increasing value added in the agri-food, fisheries and wood products sector by 70% to in excess of €13 billion
- Increasing the value of Primary Production by 65% to almost €10 billion
- The creation of an additional 23,000 direct jobs in the agri-food sector all along the supply chain from primary production to high valued added product development.

4.1.10 People, Place and Policy – Growing Tourism to 2025

Tourism is a significant contributor to the Irish economy - there were 7.6 million overseas visits to Ireland in 2014 and it is estimated that 200,000 people are employed in the tourism sector. In March 2015 the Department of Transport, Tourism & Sport published its policy framework for tourism for the next ten years *'People, Place and Policy – Growing Tourism to 2025'*. The focus of this policy is to maximise the export contribution of tourism while protecting key assets that are our natural, built and cultural heritage. It also involves a change of focus from overseas visitor numbers to overseas visitor revenue.
Specific targets set are:

- 10 million overseas visits per annum by 2025
- Overseas tourism revenue to reach €5 billion by 2025 – growth of 5% per annum
- Employment in the sector to reach 250,000
- At least 95% of all visitors will be 'very satisfied' with Ireland as a destination in the Fáilte Ireland Visitor Attitudes Survey.

State investment in tourism will focus on priorities with the maximum return for tourism, and overseas marketing will focus on visitors from both mature and developing markets. Key stakeholders with responsibility for tourism development will be the Government, state agencies, local authorities, and the tourism industry. It is also recognised that local communities have a role to play in tourism development.

It is accepted that there is limited potential for further growth in the domestic market owing to the small size of the domestic market which already has high domestic demand. Hence the focus in the new tourism policy framework is on overseas prospects.

4.1.11 CEDRA Report

From July 2014 the inaugural high level Inter-departmental Group (IDG) has been tasked with implementing the report of the Commission for the Economic Development of Rural Areas (CEDRA) which was established to develop a strategy to guide the medium term economic development of rural areas up to 2025. The report contains 35 recommendations relating to investment and finance, local enterprise support, community capability building, social enterprise, broadband, roads, water, rural transport, artisan foods, creative industries, tourism & recreation, marine and renewable energy.

In 2015 €2m was made available to pilot 18 Rural Economic Development Zones (REDZ) on a regional basis and at different levels of scale. REDZ are defined as functional rather than administrative geographic areas that reflect the spatial patterns of local economic activities and development processes. In total 154 REDZ were identified throughtout the country. The objective of the REDZ Pilot Initiative is to determine best practice in terms of how to structure and implement such projects. Pending the success of the pilot initiative a call for proposals for additional REDZ under the LEADER elements of the RDP could take place early in 2016. Ten REDZ have been identified in Co. Tipperary – these economic zones are Clonmel, Nenagh, Thurles, Cashel, Roscrea, Tipperary, Carrick-on-Suir, Cahir, Templemore, Fethard (REDZ Map – page 35).

4.1.12 Rural Development Programme 2014 -2020 Ireland

Rural Development Policy has become a significant component of the EU Common Agricultural Policy (CAP) and is supported by funding from the European Agricultural Fund for Rural Development (EAFRD), which in turn is delivered through national co-financed Rural Development Programmes (RDP). In Ireland, €235m (7% of the total RDP allocation) has been allocated to LEADER for the period 2014-2020, made up of €152.75m in EU funding and €82.25m in national funding. Two agri-food schemes will also be delivered using the LEADER approach bringing the total programme complement to €250m. LEADER in Ireland will be programmed under Priority 6 of the RDP which is 'Promoting social inclusion, poverty reduction and economic development in rural areas'. In turn, each RDP priority identifies specific areas of intervention or focus areas:

- Facilitating diversification, creation of new small enterprises and job creation
- Promoting local development in rural areas
- Enhancing accessibility to, and use and quality of ICT in rural areas.

4.2. Regional & Local Economic Policies

The Local Government Reform Act 2014 makes legal provision for the reforms set out in the Government's Action Programme for Effective Local Government *'Putting People First'* which was published in October 2012. The main changes in local government structures, including a new system of municipal districts, were brought into effect from 1 June 2014 In addition to the new municipal district arrangements. The Act provides for a wide range of reforms to local authority functions, structures, funding, performance and governance. One such reform was the formal merger of North & South Tipperary County Councils to form Tipperary County Council.

In addition, regional structures and functions were revised and strengthened with the replacement of the eight regional authorities and two regional assemblies by three new regional assemblies to perform an updated range of strategic functions. The new regions took effect from January 1st 2015 and will be as follows:

• Connacht-Ulster Region
• Southern Region (the province of Munster and counties Carlow, Kilkenny and Wexford)
• Eastern-Midland Region (the counties of Leinster other than those in the Southern Region).

Regional Planning Guidelines 2010 – 2020 of both the Mid West and South East Regional Authorities currently apply in Co. Tipperary. The *South East Regional Planning Guidelines 2010 - 2020* are underpinned by the following guiding principles:

- The need for a critical mass of population in the region and in the main settlements.
- The establishment of a University in the South-East
- Development of a range of skills and innovation capacity
- Improved access and transport linkages
- An environment which is attractive for people to live

The *Mid West Regional Planning Guidelines 2010 – 2020* key objectives include networking the national Gateways, development of transport corridors and the identification of the role of medium-sized towns and rural areas as drivers of sustainable development.

In addition, the *Research & Innovation Strategy for the Mid West Region of Ireland 2014 -2018* recognises that the support and development of Smart Specialisation, Cluster Development, Open Innovation and Support to Entrepreneurs and Innovators are the key cornerstones to future growth in the region.

The *South Tipperary Interagency Innovation & Entrepreneurship Strategy 2009* concluded that the sustainable development of the SME sector together with an FDI presence was critical for recovery and growth. It was identified that building on the area's strengths was central to achieving a strong enterprise and innovation culture in the area as was the development of stronger collaborative networks between appropriate entrepreneurs; development of productive linkages between third level colleges and local enterprises; addressing financial challenges of businesses; and building stronger interagency collaborative operations.

The *Atlantic Gateways Initiative - Corridor Development Framework* recommendations in relation to the Waterford – Limerick/Shannon Corridor includes the upgrading of the N24 National Route as a major inter-urban corridor to reinforce the transport links between Waterford and Limerick cities. It promotes the accelerated development of key towns along the Waterford- Limerick/Shannon Corridor which would incorporate the following towns in Co. Tipperary: Carrick-on-Suir, Clonmel, Cahir, Tipperary, with both Cashel and Thurles as towns within the hinterland of the corridor as attractive places to live and work.

The *Mid West Area Strategic Plan 2012 – 2030* is the policy framework to guide physical and spatial planning for the Mid West region. Its objectives includes strengthening Limerick City as the economic driver for the region; promoting balanced regional development with stronger roles, in the case of the northern part of Co. Tipperary, of Nenagh and Thurles as rural economic nodes; and identifying and promoting investment in key infrastructural projects – road network, water services, rail, air, and port infrastructure.

Currently both *North & South Tipperary County Development Plans* apply to the relevant areas within the newly merged administrative area of County Tipperary. Both plans recognise the need to sustain existing employment and commercial enterprise while at the same time promoting and encouraging inward investment and entrepreneurship within the county. Both plans are underpinned by an objective to balance the need for economic development against the overall improvement in quality of life throughout the county. Also, both plans recognise that the major towns in County Tipperary are instrumental in driving economic growth in the area.

The *South Tipperary Renewable Energy Strategy* was prepared as a joint initiative by South Tipperary Council and Tipperary Energy Agency. It will ensure that South Tipperary can take advantage of renewable energy opportunities thus creating local jobs and increasing the self-sufficiency of the county, while at the same time protecting the heritage and amenity of the area. An all county renewable energy strategy is currently being developed. As of May 2015 the development of a *County Tipperary Renewable Energy Strategy* had commenced.

The central objective of both the *South Tipperary Retail Development Plan 2010* and the *North Tipperary County Retail Strategy 2011* is to support the “town centre” first approach in the context of the retail hierarchy, and to promote the vitality and viability of existing centres by focusing development in the town centre and encouraging a wide range of services in a good environment which is accessible to all. In addition, South Tipperary County Council developed a Retail Development Programme in 2012 to promote a vibrant and viable retail sector. Also in operation is a Commercial Incentive Scheme for the retail use of vacant town centre nad village centre properties. A Town Centre Strategy and a new Commercial Incentive Scheme, to operate on an all county basis, are being developed during 2015.

The Tipperary Food Sector Strategy 2010 – 2020, prepared by the Tipperary Food Producers, outlines a number of key strategic objectives and initiatives to generate greater economic activity for the Tipperary Food Producers and the wider food sector in the county for the period 2010 – 2020. Initiatives include the development of a ‘Tipperary’ food brand for the export market; development of a Food Centre of Excellence and actions to maximise food and drinks production in the county.

A *Mid West Regional Enteprise Strategy* and a *South East Regional Enterprise Strategy* were developed in mid 2015. The northern part of Co. Tipperary falls under the former and the sountern part of the county under the latter. Under the Regional Enerprise Strategy initiative a Competitive Fund for LEO led collaborative interventions was announced. A numbe rof application were submitted by LEOs in the Mid West and South East. Types of initiatives proprosed include food service development, food exporting, exploring the potential to grow the agri-tech sector in the region, social enterprise development, and scaling of companies to compete in national and international markets.

4.3 Summary

Contained within the various strategies developed on a regional and county basis a number of common recommendations have been identified to stimulate and sustain economic growth in the region and county. These include the development of local economies through:

- Sustainable development of the SME sector together with an FDI presence
- Recognition that medium sized towns and rural areas are drivers of sustainable economic developmentand the need to ensure they are thriving, active and vibrant locations
- Identifying and building on an area's strengths
- Sustaining existing employment and commercial enterprise while also promoting and attracting inward investment
- Development of a range of skills and innovation capacity to include R&D and establishment of greater linkages with third level institutions
- Enhancement of transport and access linkages.

5. Support Agencies & Organisations

5.1 IDA Ireland (Industrial Development Agency)

IDA Ireland is responsible for seuring additional investment to Ireland and the development of foreign investment in Ireland – thus it attracts new investors to Ireland and manages relationships with existing FDI companies. IDA Ireland works closely with third level colleges in the South East Region, including LIT Tipperary, to ensure the necessary skills and capabilities are in place to meet the needs of FDI.

5.2 Enterprise Ireland (EI)

Enterprise Ireland is the government organisation responsible for the development and growth of Irish enterprises in world markets. They work in partnership with enterprises to help them to start, grow, innovate and win export sales on global markets. Through the provision of funding, training & support, infrastructure & accommodation, and the development of linkages and networks, EI supports sustainable economic growth, regional development and secure employment.

5.3 Local Enterprise Office (LEO), Tipperary

The *Action Plan for Jobs* is committed to delivering an enhanced, expanded and more integrated support service for micro and small business in Ireland. As part of these reforms new Local Enterprise Offices (LEOs) have been created within Local Authorities. They have combined the resources of the former City/County Enterprise Boards with the local authority business support units. LEO, Tipperary is responsible for the delivery of services and supports to the microenterprise sector on behalf of Enterprise Ireland.

5.4 Teagasc

Teagasc is the agriculture and food development authority in Ireland. Its mission is to support science-based innovation in the agri-food sector and the broader bioeconomy that will underpin profitability, competitiveness and sustainability.

5.5 Tourism Ireland (TI)

Tourism Ireland is responsible for marketing the island of Ireland overseas as a holiday and business tourism destination. It devises and delivers marketing programmes in over 20 markets across the world, reaching an audience of up to 200 million potential visitors each year. Targeted marketing activity includes advertising online, on TV and outdoor sites, in cinemas and in newspapers and magazines, eMarketing, overseas publicity, co-operative marketing with carriers and other partners and promotions to the travel trade and consumers. Tourism Ireland also helps to influence tourism product development here on the island of Ireland by sharing insights on global tourism trends and the changing needs of overseas consumers with the Tourist Boards and with other tourism industry partners.

5.6 Fáilte Ireland (FI)

Fáilte Ireland is the National Tourism Development Authority. Its role is to support the tourism and provide a range of practical business supports to help tourism businesses better manage and market their products and services. It also works with other state agencies and representative bodies, at local and national levels, to implement and champion strategies that will benefit Irish tourism and the Irish economy. It promotes Ireland as a holiday destination through its domestic marketing campaign (DiscoverIreland.ie) and manages a network of nationwide tourist information centres that provide help and advice for visitors to Ireland.

5.7 Tipperary Education &Training Board (ETB)

ETBs are established under and governed according to the Education and Training Boards Act 2013. ETBs are statutory education authorities which have responsibility for education and training, youth work and a range of other statutory functions. ETBs manage and operate second-level schools, further education colleges, pilot community national schools and a range of adult and further education centres delivering education and training.

5.8 Local Development Companies (LDC)

Local Development companies operating in Co. Tipperary are North Tipperary LEADER Partnership and South Tipperary Development Co. These companies have been responsible for the delivery of Axis 3 and 4 of the Rural Development Programme 2007 - 2013 in North and South Tipperary respectively.

5.9 Tipperary Energy Agency (TEA)

Tipperary Energy Agency was established in 1998 by the Tipperary Local Authorities and LIT Tipperary (then Tipperary Institute) as an independent social enterprise. Its goal is to support sustainable energy use in all sectors and is committed to providing a comprehensive range of energy services to achieve this goal. Services available include strategic energy management advice, energy project management and energy audits.

5.10 University of Limerick (UL)

The University of Limerick (UL) has links with over 400 universities in 38 countries and welcomes over 2,000 international students each year. UL has four research institutes – Materials & Surface Science Institute; Stokes Research Institute (micro-scale mechanical engineering); Irish Software Engineering Research Institute; and Study of Knowledge in Society (political, social and cultural change).

5.11 LIT, Limerick & Tipperary

Limerick Institute of Technology (LIT) the fourth largest IOT in Ireland, with more than 6000 full time and part time students and 500 staff. It has five campuses and a learning centre across Limerick City, Tipperary and Clare. The LIT Tipperary School is based in the two Tipperary Campuses, in Thurles and Clonmel. LIT offers courses at Level 6 (certificate) through to Level 10 (PhD) whilst also catering for craft apprentices and adult and continuing education.

Research Centres in LIT Limerick and Tipperary include the ACORN Research Group, Shannon Applied Biotechnology Group, Centre for Rural & Sustainable Development, Foods Development Centre, and the Limerick School of Art & Design.

5.12 Waterford Institute of Technology (WIT)

WIT currently caters for over 10,000 students of which 6,500 are full-time and over 4,000 are part-time. It provides a wide range of vocationally oriented courses, which lead to internationally recognised awards at both undergraduate and postgraduate levels. WIT is focused on building centres of research excellence in areas which are of strategic importance to Ireland and the South-East region. These include Bio-Pharma, Communications Networks and Mobile Services and Advanced Manufacturing. It has developed strategic partnerships with global industrial leaders and indigenous High Potential Start-Ups creating real economic benefit.

5.13 St. Patrick’s College, Thurles

St Patrick's College is a college of education, primarily specialising at undergraduate level in preparing students to teach in post-primary schools. Accredited by the University of Limerick, the college currently offers four full-time BA in Education degrees in the following disciplines - Religious Studies, Irish, Business and Accountancy. As well as offering full time academic courses, St. Patrick’s College serves as a centre for theological, pastoral and spiritual renewal in the region and continues to provide opportunities for community learning. St. Patrick’s College is also currently developing postgraduate programmes.

5.14 Gurteen College, Ballingarry

Owned by Teagasc and in existence since 1947, Gurteen College offers a range of practical agricultural training courses on their 380 hectare farm. The centre offers both residential and day time tuition to meet the training needs of young farmers to include farming practices, certification, and succession.

5.15 Garda College, Templemore

The Garda College is the national centre for police training, development and education within the Irish State. The college has a modern university campus type structure located on 8 acres within the town of Templemore. It also has 240 acres of undeveloped land which is used for tactical and operational training interventions. It is a CEPOL networked partner hosting a number of European Police training initiatives on an annual basis. The college also provides education, training programmes and interventions ranging from M.A; B.A, B.Sc in Police Leadership, Higher Diplomas, Certificates to Firearms, Driver Training, Public Order and First Aid Programmes. It is an accredited Third Level training and educational centre within the National Qualification Framework (NQF) of Ireland providing accredited programmes from level 6 to level 9 on the NQF. In addition the Garda College partners with other third level institutions in the facilitation of programmes.

5.16 County Tipperary Chamber of Commerce (CTC)

The County Tipperary Chamber of Commerce is based at the offices of Clonmel Chamber and has a countywide focus. The organisation is focused on the development of local business, securing inward investment and increasing the skill levels of employees at Tipperary companies. CTC acts as the voice of the business community in the county and lobbies on business related issues on a local and national level. CTC has two Department of Education Skillnet Networks based at their offices which work with local companies to provide training for staff. The networks also manage training for jobseekers through their annual schedule of courses and through jobseeker support programmes.

5.17 Chambers of Commerce & Local Business Groups

Chambers of Commerce and Local Business Groups are active throughout Co. Tipperary. These include Chambers of Commerce in Clonmel, Nenagh, Cashel and and Thurles; and business groups such as Carrick on Suir Business Association and Tipperary Integrated Resource Devlopment. These organisations are involved in creating and maintaining a positive business environment in the area. Their objectives include enabling businesses to develop more opportunities, generate additional revenue and create further employment locally.

6. Economic Overview of County Tipperary

6.1 Introduction

County Tipperary has a population of 158,765 (Census 2011). As previously stated, in 2014 local government reform resulted in the creation of one local authority - Tipperary County Council – for the county. This can be seen as both an opportunity and a challenge. It has resulted in synergies which provide economic opportunities for the county, an example of which is the increased tourism offering. On the other habd, the county's location between Limerick City and Waterford could be seen as both a challenge and an opportunity. In drawing up the LECP cognisance has been taken of the newly merged county and its potential in terms of ecnomic development.

The county's economic profile is that of a rural economy with FDI and indigenous enterprises – micro-enterprises and SMEs - which operate across a range of sectors. The county's diverse economy includes:

- A Life Sciences/Bio Pharma Hub around Clonmel that includes Abbott Vascular, Boston Scientific, Suir Pharma, MSD, and Pinewood Laboratories
- Manufacturing enterprises such as Bulmers, Medite Ireland, Procter and Gamble, Carey's Glass, Lisheen Mine, and Tipperary Natural Mineral Water
- Rural towns which play a significant role in providing retail and financial services, recreation and employment
- Superb fertile land which provides an ideal environment for agriculture and food production which includes artisan foods
- A horse breeding industry which includes the world renowned Coolmore Stud Farm and Ballydoyle Racing Stable
- Tourism which offers significant potential for the rural economy. Key tourism attributes are the built and natural heritage of the county and the opportunities the landscape offers for outdoor recreation. Attractions include Lough Derg, mountain ranges such as the Knockmealdowns, Galtees, Slieve Felim, and the Devil's Bit; the Rock of Cashel, Holycross Abbey, Cahir Castle and Roscrea Castle.
- A third level education facility, Limerick Institute of Technology, which has campuses in Clonmel and Thurles; and linkages with third level colleges in adjacent counties.
- One such reform was the formal merger of North & South Tipperary County Councils to form Tipperary County Council.

Positive developments planned that will enhance the county's attractiveness for further economic growth include the following:

- The development of 'Questum' – a multi-purpose 1,700 sq.m. education, training and research centre on the Science and Technology Park in Ballingarrane
- A review of the current bespoke plan for Ballingarrane which will outline the suitability of the park for high end employment uses (including medical device, pharmaceuticals, food and advanced engineering projects) and the development of an appropriate marketing plan for same. The Ballingarrane site is tailored for the Bio Pharma investment.
- Development potential of the Lisheen Mine site which comprises the mine shaft and related facilities, a substantial aquifer, modern office buildings, fully equipped engineering workshops, sophisticated IT networks, and an environmental monitoring centre
- Destination & experience development ongoing and planned for Lough Derg and Munster Vales tourism destinations and the potential for areas of the county included in Ireland's Ancient East proposition
- Provision of Gas pipeline from Limerick to Nenagh
- Further development of existing enterprise centres

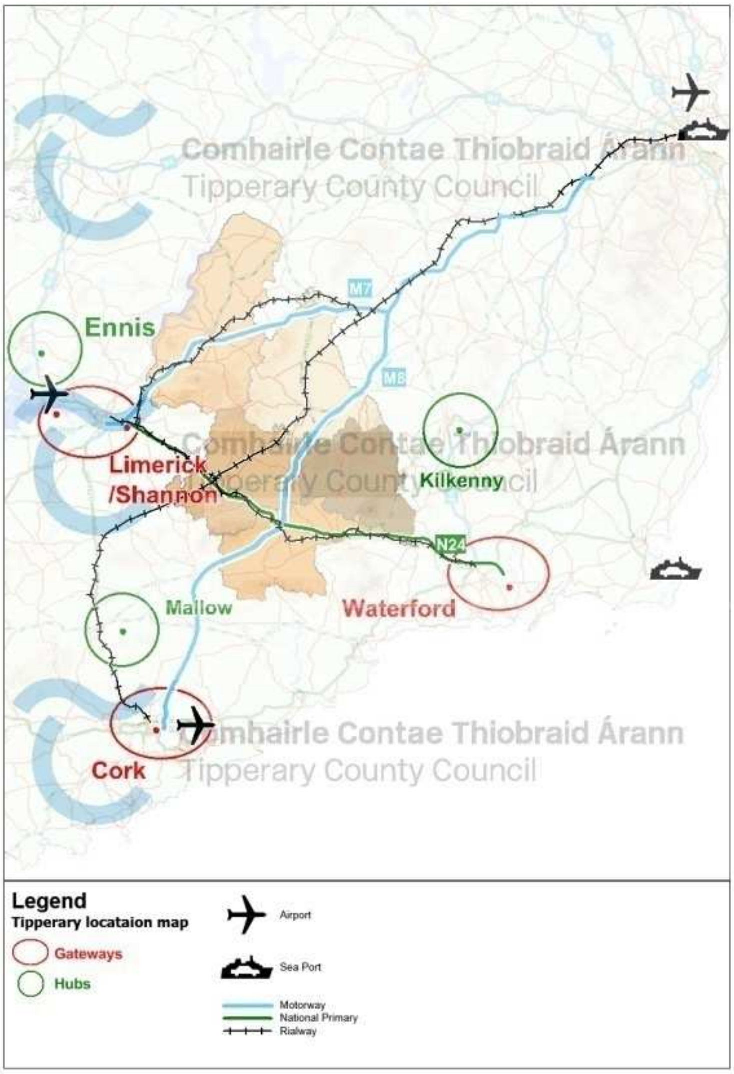
- Redevelopment of Kickham Barracks in Clonmel in partnership with LIT, the ETB and AGS to provide an innovative, creative cultural civic quarter for the Town of Clonmel.

6.2 Connectivity & Infrastructure

6.2.1 Road, Rail & Air Transport

County Tipperary has two motorways running through the county (M7 & M8) which allow for greater accessibility to Dublin, Cork and Limerick. The county is within easy reach of Dublin, Shannon and Cork Airports. Air connectivity with the US has improved further with enhanced services at Shannon Airport which include routes to and from Boston, Chicago, New York and Philadelphia and key European destinations. The county also is served by ports in Dublin and Rosslare.

Co. Tipperary – Economic Connectivity



In addition, Co. Tipperary has good rail services on the Dublin to Cork line with good road links to Thurles and Limerick Junction Rail Stations. Tipperary is also serviced by a rail line linking Waterford to Limerick with train stations operable in Carrick on Suir, Clonmel, Cahir and Tipperary Town. The retention of an appropriate rail service between Waterford and Limerick is considered a priority for the area.

Upgrading of the N24 national primary road linking Limerick and Waterford is a key priority in terms of economic development in Co. Tipperary and the greater South East region. It would provide enhanced access to the Limerick and Waterford Gateways as well as assuring the completion of a Western/South Eastern corridor linking the gateways of Galway, Limerick, Shannon and Waterford. Upgrading of the N24 was raised at the stakeholder and public consultations held as part of the LECP process as was the need for upgrading of road linking Clonmel –Thurles - Nenagh.

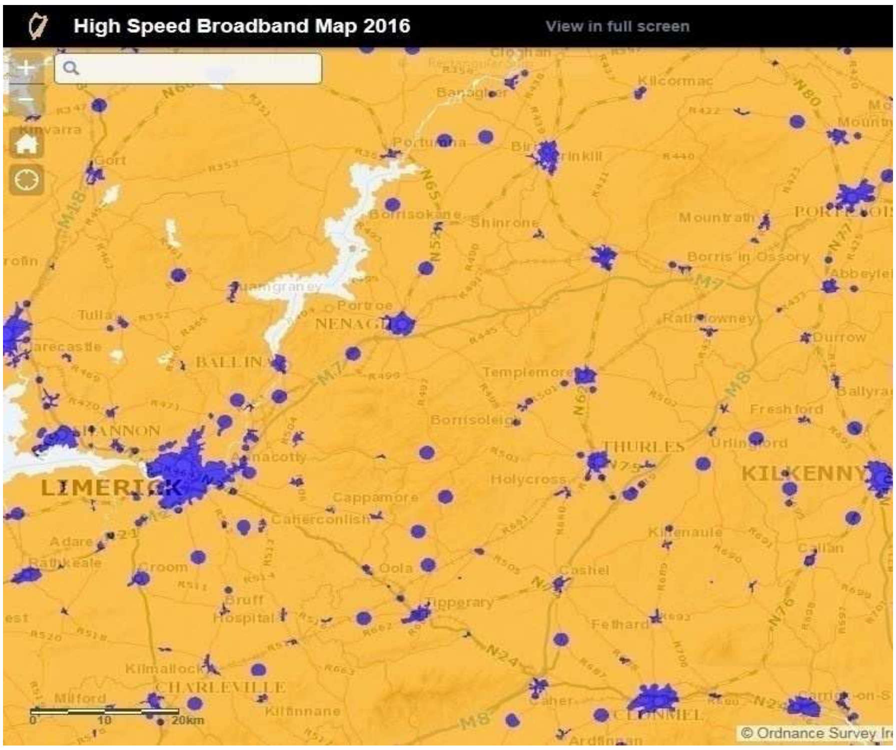
A critical infrastructure requirement is a water reservoir for the northern part of Clonmel. Security of water supply is essential as there are over 3,000 employed in pharma/healthcare in this area and also it is necessary to assist the development of the 300 acre Ballingarrane site which incorporates an IDA owned 50 acre site.

6.2.2 Broadband

Central to the NBP will be fibre build-out to locations identified as having no existing or planned fibre network. State intervention ensure that fibre will be delivered to access points for homes and businesses where service providers can use the fibre to provide high speed broadband to end users.

The DCENR has undertaken a comprehensive mapping process which shows areas where the commercial sector will provide Next Generation Access (NGA) and areas where there is a requirement for state intervention. The mapping process has identified 2.3m premises in the state. It is expected that 1.6m of these premises will have NGA provided by the commercial sector and 700,000 will require government intervention (100,000 commercial & 600,000 residential) to have NGA provided e.g. small villages, rural ribbon developments, and rural one-off houses. In the case of Co. Tipperary 43,368 premises (51%) are located within commercial operators area and 41,207 (49%) premises within the NBP Intervention Area.

State Intervention Areas for Next Generation Broadband Provision in County Tipperary[1]



Source: NBP Map - February 2015

[1] Map available on http://www.broadband.gov.ie/

High speed broadband is available in Clonmel, Tipperary Town and Cashel. The infrastructure is in place for Cahir and Carrick-on-Suir. As part of Phase II of the Government's Metropolitan Area Networks (MANs) Programme, MANs were built in the towns of Nenagh, Roscrea and Templemore. These MANs are State owned open access telecommunications networks and will be offered to telecommunication service providers, on a wholesale basis, to enable them to provide high-speed broadband services to their customers without them having to build their own networks. The provision of MANS broadband for Nenagh and Roscrea with expected broadband speeds of 100mb have been completed.

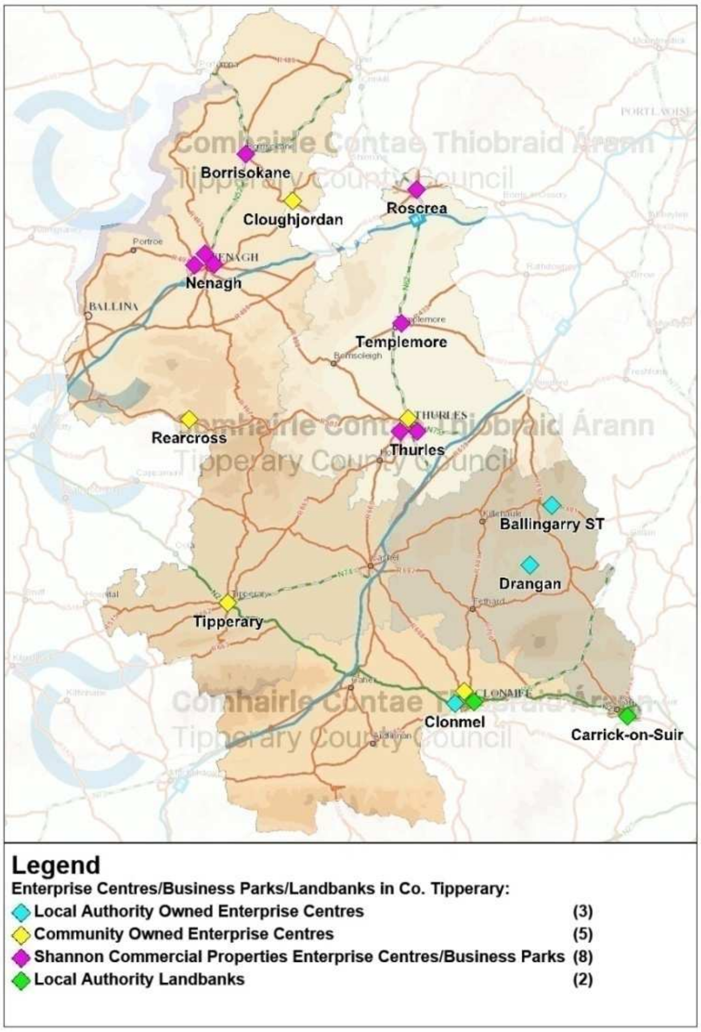
The installation of a MANs in Thurles is considered a priority together with support for connection to MANS for businesses in towns where it currently exists. The need for provision of high speed broadband in rural areas was also an issue raised in the Community element of the LECP. Monitoring of provision of NGA in Co. Tipperary under the NBP and addressing any deficits will be a priority under the LECP.

6.2.3 Business Parks & Workspace

There are a number of Business Parks/serviced sites provided by Shannon Development /Shannon Airport Authority (SD/SAA) in the northern part of the county. These include Thurles Technology Park; Stafford St. Enterprise Centre, Connolly St. Enterprise Centre, and Lisbunny Business Park, Nenagh; Templemore Business Park; and Roscrea Business & Technology Park. Four private industrial premises are located on 16.8 acres in the Archerstown Industrial Estate, Thurles. The master plan for the 60 acre Archerstown landbank incorporates a FDI focused sector. Tipperary County Council also owns two landbanks in the county – located in Clonmel and Carrick-on-Suir.

In addition, Co. Tipperary has five community owned enterprise centres - Cloughjordan Green Enterprise Centre (FabLab), Rearcross Food Centre, Thurles Chamber Community Enterprise Centre, Clonmel Business Development Park, and Tipperary Technology Park in Tipperary Town. Tipperary County Council also owns Drangan Enterprise Centre, Ballingarry Enterprise Centre, and Questum in Ballingarrane, Clonmel. The latter although owned by TCC is leased to LIT, Tipperary.

Enterprise Centres, Business Parks & Landbanks in Co. Tipperary



These centres provide a mix of incubation space and hot desk facilities for start-up enterprise. A review of occupancy rates conducted in September 2014 revealed that occupancy rates in Drangan, Ballingarry and Cloughjordan Enterprise Centres were 100%; occupancy rates in Thurles Chamber Community Enterprise Centre was 70%, Rearcross Enterprise Centre was 50%, Tipperary Town Enterprise Centre was 50% and 100% in Clonmel Enterprise Centre.

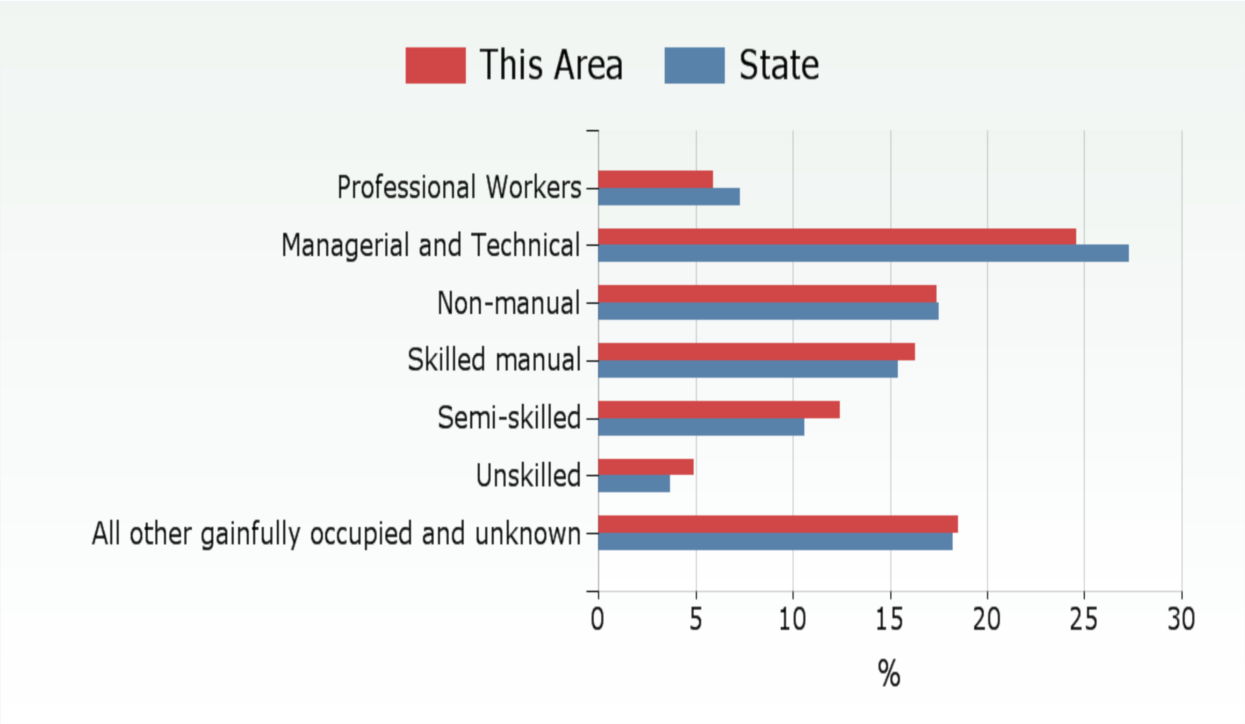
A review of workspace in the county indicated that there was a need for workspace in Roscrea. The provision of community enterprise workspace in Roscrea has been identified as a need locally and a feasibility study to ascertain likely demand and type of provision required is currently underway. The need to promote the availability of workspace solutions in the county, to ensure continued management of these facilities and appropriate supports are provided to businesses located in these centres is critical. It is therefore recommended, as a strategic action of the LECP, that an enterprise support plan for enterprise centres is developed and implemented.

6.3 Employment in Co. Tipperary

6.3.1 Labour Force & Employment in Co. Tipperary

According to the CSO 2011 there were 75,328 persons aged 15 years and over in the labour force in Co. Tipperary and of these, 80.1 per cent (60,332 persons) were at work. The unemployment rate for this area was 19.9 per cent compared with a national average rate of 19.0 per cent in 2011. However, the current unemployment rate nationally has reduced significantly since 2011. The indicative live register figures in the county show that the number unemployed is approximately 10% but this varies in different parts of the county.

Social Class Comparison – CSO 2011



Of the 49,040 persons aged 15 years and over who were outside the labour force, 25.0 per cent were students, 25.9 per cent were looking after the home/family and 34.9 per cent were retired. Of the 60,332 workers enumerated in this area, 12,423 worked outside the area. The daytime working population (resident and non-resident) of this area was 45,358 with commerce and trade being the largest industry.

6.3.2 Employment by Industry in Co. Tipperary - 2011

Industry	Daytime Working Population – Co. Tipperary	% of Working Population – Co. Tipperary	National Daytime Working Population	% of National Working Population
Agriculture, Forestry and Fishing	6,817	11.29914	94,247	5.214622
Construction	3,391	5.620566	90,357	4.999391
Manufacturing Industries	8,425	13.9644	193,080	10.68299
Transport, Storage & Communications	2,253	3.734337	5,674	0.313939
Public Administration & Defence	3,873	6.419479	113,521	6.28104
Mining, Quarrying & Turf Production	529	0.876815	13,116	0.725699
Electricity, Gas & Water Supply	294	0.487304	265,751	14.70382
Wholesale & Retail Trade	9,026	14.96055	103,560	5.729904
Hotels & Restaurants	2,841	4.708944	97,569	5.398426
Banking & Financial Services	1,517	2.51442	93,151	5.153981
Real Estate, Renting & Business Activities	3,410	5.652059	184,251	10.19448
Education	5,451	9.035006	163,728	9.058959
Health & Social Work	6,533	10.82842	203,379	11.25282
Other Community, Social & Personal Services Activities	2,578	4.273023	84,665	4.684457
Industry not stated	3,394	5.625539	101,311	5.605469
Total	**60,332**	**100**	**1,807360**	**100**

Source: CSO 2011

The above table illustrates the number of person employed in various industry sectors (Census 2011). The county as a whole has a higher than average share of persons at work in industry and lower than average shares of persons at work in financial and professional activities, administration, and information and communication.

Persons at work in North Tipperary were more likely to be in the older age cohorts than the national average (24% compared to 30%).The share of unemployed persons aged less than 25 years was highest in South Tipperary at 22%.

Analysis of Census 2011 data in the *Regional Labour Markets Bulletin 2013* further reveals that Co. Tipperary had a lower than the national average share (39%) of persons at working in high skilled occupations (managers, professionals and associate professionals). As with other counties in the Mid West and South East regions Co. Tipperary had a higher share than the national average of persons at work in skilled trades and in the case of North Tipperary this accounted for 22% of employment (compared to 15% nationally and 20% in the case of South Tipperary). The county also had a higher share of persons occupied in operative occupations.

Co. Tipperary, in terms of sectoral employment, has a high share of persons at work in Agriculture at over 11% (compared to 5% nationally) and the **third highest rate of participation in the AFF sector of all local authority areas in Ireland** with only Cavan and Monaghan with higher rates. Of those employed in the sector and residing in the county, **approximately 76% (5,219) are employed within Tipperary. Jobs in the**

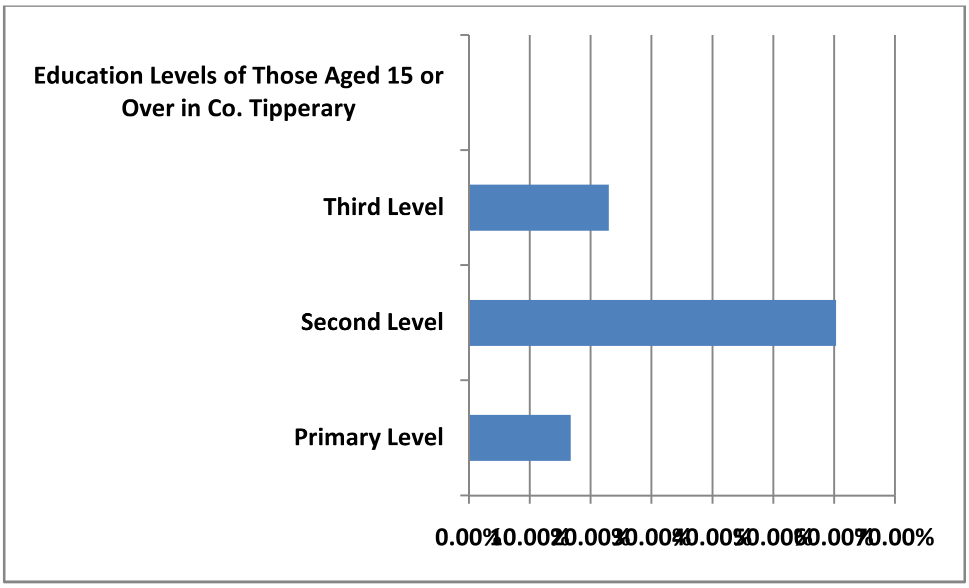
sector are primarily undertaken by Tipperary residents – 97% reside within the county and 3% commute from outside the county. As would be expected most AFF jobs are located in rural and peripheral areas of the county.

A total of 9,150 Tipperary residents are employed in the Manufacturing sector[2]. This represents **15.3% of workers and is higher than the state average of 11.7%.**The total number of residents employed in this sector represents 4.4% of the national total. Tipperary has the **7th highest rate of participation in the Manufacturing sector of all local authority areas in Ireland.** Of those employed in this sector and residing in the county, approximately **71% (6,524) are employed within Tipperary**, 20% (1,874) employed outside the county and 8% (752) classed as Mobile or having an uncodeable work destination. There is evidence of **higher rates of participation in the north and south of the county** - in particular, many areas in close proximity to Clonmel and manufacturing industries located there have rates in excess of 20%.

Based on an analysis of all fixed occupation jobs, there are a total of 8,337 Manufacturing jobs located in Co. Tipperary. This is equivalent to 18.4% of all jobs located in the county (6th highest rate of all local authorities - Figure 7) **and is the 3rd highest employer in the county**. **The jobs are primarily undertaken by Tipperary residents with 78% (**6,524) residing within the county and the remaining 22 %(1,813) commuting from outside the county. The location of manufacturing jobs as a percentage of all jobs reveals quite a clustered spatial pattern with highest concentrations in settlements such as **Clonmel, Roscrea, Cashel, Nenagh and Thurles**. Outside of the main settlements there is generally a low level of local manufacturing jobs.

6.3.3 Education Levels

Of those aged 15 years and over in Co. Tipperary whose full-time education had ceased, 16.7 per cent were educated to at most primary level only; a further 60.3 per cent attained second level while 23.0 per cent were educated to third level.



[2] Manufacturing, Mining & Quarrying, Electricity, Gas, Water Supply, Waste Management

When compared both to the other counties in the Mid West and nationally, North Tipperary **had the highest share of persons at work with lower secondary education or less and the lowest share of persons at work with third level qualifications**. South Tipperary had a particularly higher than average share of persons with lower secondary education or less, and a lower than average share of persons at work with third level qualifications (Census 2011).

6.3.4 Employment & Unemployment

Persons at Work and Unemployed in the Mid West Region by County – Census 2011

Employment Status	Clare	Limerick	North Tipperary	Total
At Work	**32%**	**49%**	**19%**	**100%**
Unemployed	**30%**	**52%**	**18%**	**100%**

Persons at Work and Unemployed in the South East Region by County – Census 2011

Employment Status	Carlow	Kilkenny	South Tipperary	Waterford	Wexford	Total
At Work	**11%**	**20%**	**18%**	**23%**	**28%**	**100%**
Unemployed	**12%**	**18%**	**17%**	**23%**	**32%**	**100%**

The above tables show that North Tipperary had the lowest share of persons employed and unemployed in the Mid West Region. In the South East Region, South Tipperary rated second lowest in terms of both persons employed and unemployed in the South East Region. Of those unemployed aged under 25, Co. Tipperary had a higher rate than other counties in both the Mid West and South East Regions. The share of those unemployed aged 25 or less is particularly high for Co. Tipperary

Census 2011 also shows that all counties in the South East and Mid West Regions had a lower than national average share (39%) of persons at work in high skilled occupations. In the case of North Tipperary the share was particularly low – 33%. North Tipperary, at 22%, had a higher than national average (15%) of people occupied in skilled trades. North Tipperary also had a higher than national average employed in agriculture

Co. Tipperary had a higher than average number of persons with lower secondary education. In particular, North Tipperary had a higher than national average share of persons at work with lower secondary education or less and the lowest share of persons at work with third level qualifications.

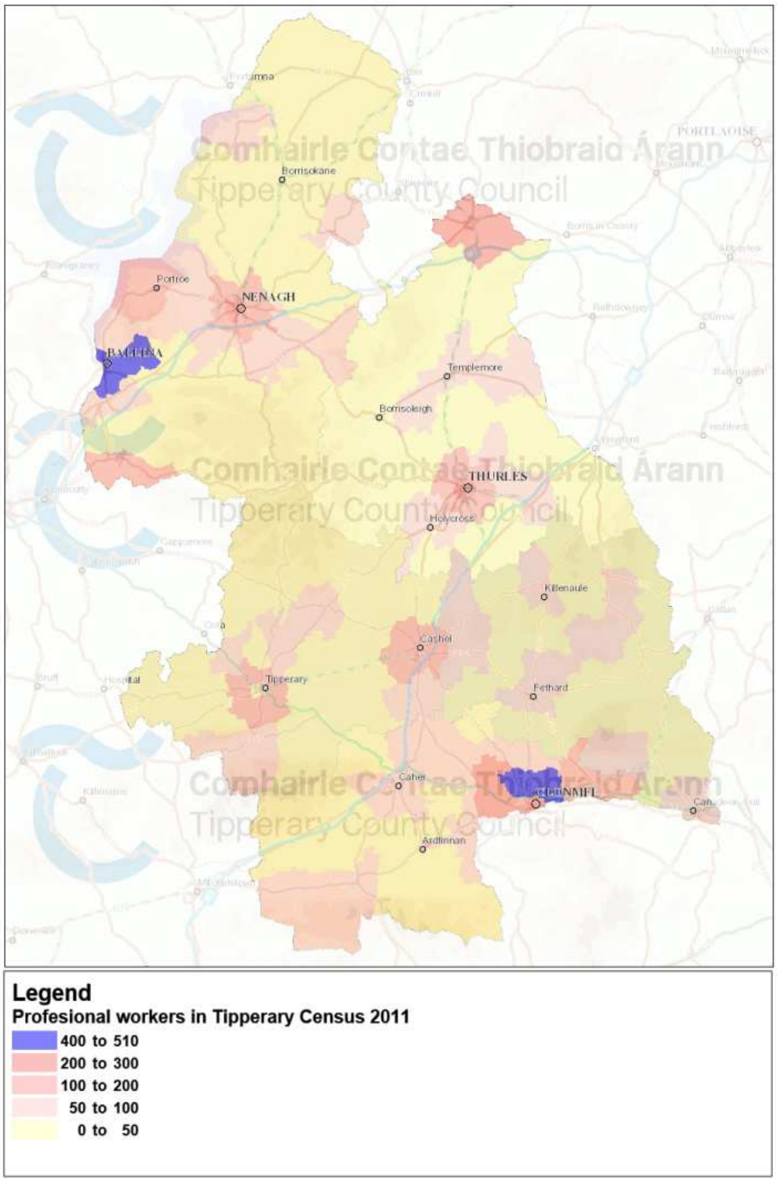
In summary it can be seen that with regard to:

- **Occupation:** The share of persons at work in high skilled occupations (managers, professionals and associate professionals) was particularly low in North Tipperary at 33% compared with national average of 39%, and a higher share of persons at work in skilled trades, with this occupation accounting for 22% of employment in North Tipperary (compared to 15% nationally). This was similar for South Tipperary.
- **Sector:** North Tipperary had the highest share of persons at work in agriculture at 11% (Compared to 5% nationally) and South Tipperary had a higher than average share of persons employed in industry. Both counties had a lower than average shares of persons at work in financial and information and communication activities.
- **Education:** When compared both to the other counties in the Mid-West and nationally,

North Tipperary had the highest share of persons at work with lower secondary education or less and the lowest share of persons at work with third level qualifications.
South Tipperary also had a higher than average share of persons with lower secondary education or less and a lower than average share of persons at work with third level qualifications.

- **Age:** Persons at work in North Tipperary were less likely to be aged 25-34 years and more likely to be in the older age cohorts than the national average (24% compared to 30%);
- **Unemployment:** Unemployment for those previously employed in industry was higher than average in all counties in the Mid West. North Tipperary had the highest share of persons unemployed aged under 25 of all counties in this region. The share of unemployed persons aged less than 25 years in South Tipperary was 22%.

6.3.5 Residential Location of Professional Workers in Co. Tipperary



Source: CSO 2011

As can be seen from the map the highest numbers of professional workers are live in the Clonmel and Ballina areas. This is followed by concentrations in Nenagh, Thurles, and the Roscrea area. In general concentrations are in or adjacent to urban centres. This information should assist activity in the context of targeting the promotion of start-ups and/or in the context of encouraging greater research and development. By promoting high quality living spaces and high quality communities in these key areas, it will assist the county to attract and retain greater numbers of professional workers – this is critical in terms of progressing the county up the value chain and will assist it become more robust and resilient in economic terms.

6.3.6 Workforce Development

The LECP recommends that workforce development is addressed as a priority in the LECP in order to meet current and future workforce requirements of businesses in the county. The *'Training & Education Needs of Businesses in Co. Tipperary 2014'* report recommends the establishment of a Training & Education Forum for Co. Tipperary which would seek to integrate the activities of providers, minimise overlap of training provision, and ensure training and education provision was relevant to employers. Recommendations also include a programme to promote the importance of continuing education for the workforce and collaboration between companies in the provision of training and education. Under the FET Strategy ETBs have a remit to create Employer Forum/Fora which will work with employers to identify workforce training needs and devise ways to address these needs.

6.4 Commuting Patterns of the Workforce

The CSO Place of Work Census of Anonymised Records (POWCAR) contains the place of work details of all employed persons who undertook a journey to work. It contains the demographic and socio-economic characteristics of these workers along with information on the origin and destination of their journeys to work. The All-Island Research Observatory (AIRO) at Maynooth University, on behalf of TCC, carried out an analysis of POWCAR data for Co. Tipperary to develop a county profile of employment community flows and a jobs profile of ley employment locations in the county. Key findings were as follows:

- Based on a analysis of the 2011 Place of Work Census of Anonymised Records (POWCAR), a total of 59,628 persons (aged 15+) were enumerated as residing in Tipperary and being 'At Work'.

- Of this population, 64.7% (38,555) were employed within Tipperary, 17.5% (10,452) were employed outside Tipperary, 9.2% (5,463) were classed as Mobile workers and 8.7% (5,158) had a blank or uncodeable work destination.

- The total number of residents in with a fixed place of work is 49,007. Of this population, 21.3% (10,452) are classed as Outbound (Out of County) Commuters. Tipperary has the 9th lowest rate of Outbound Commuters with a marginally higher rate than Waterford and Limerick.

- The main destination for Outbound Commuters are Limerick (3,745), Kilkenny (1,267), Waterford (1,130), Offaly (635), Clare (608), Cork County (591), Dublin City (513)

- Map 1 details the percentage of the fixed workforce at Electoral Division level that commutes out of the county for employment. Highest rates are on the western and eastern border of the county with main destinations in these areas being Limerick and Clare on the west and Kilkenny and Waterford on the east. Commuting rates in these areas are high with many EDs having in excess of 50% of all workers in commuting out of the county on a daily basis.

- The commuting catchments of Tipperary workers to main destinations outside the county are: Limerick City, Cork City, Kilkenny City, and Waterford City.

Figure 3 National and Local Commuting Flows, 2011

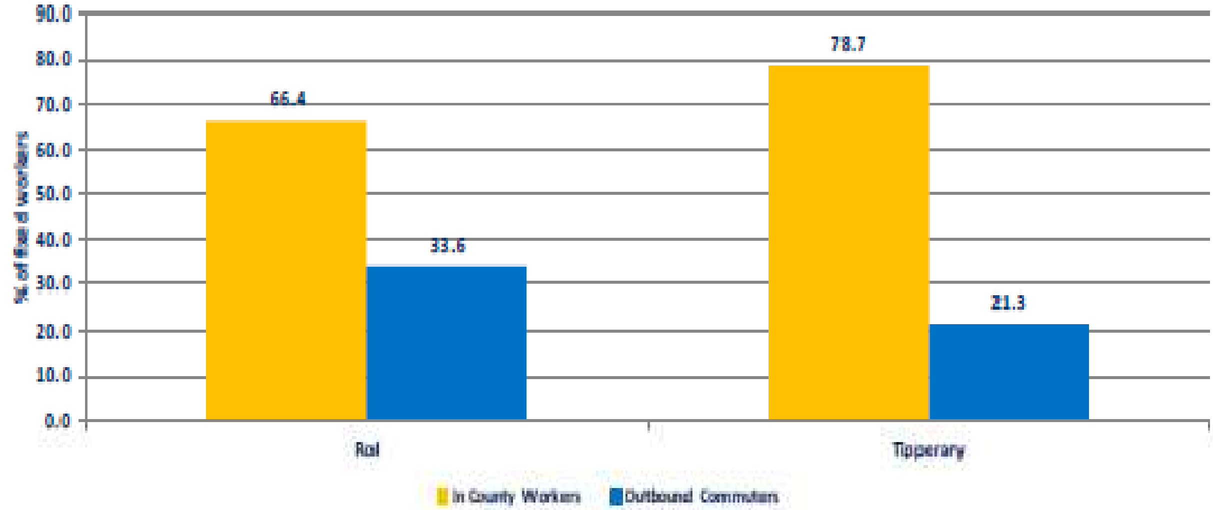
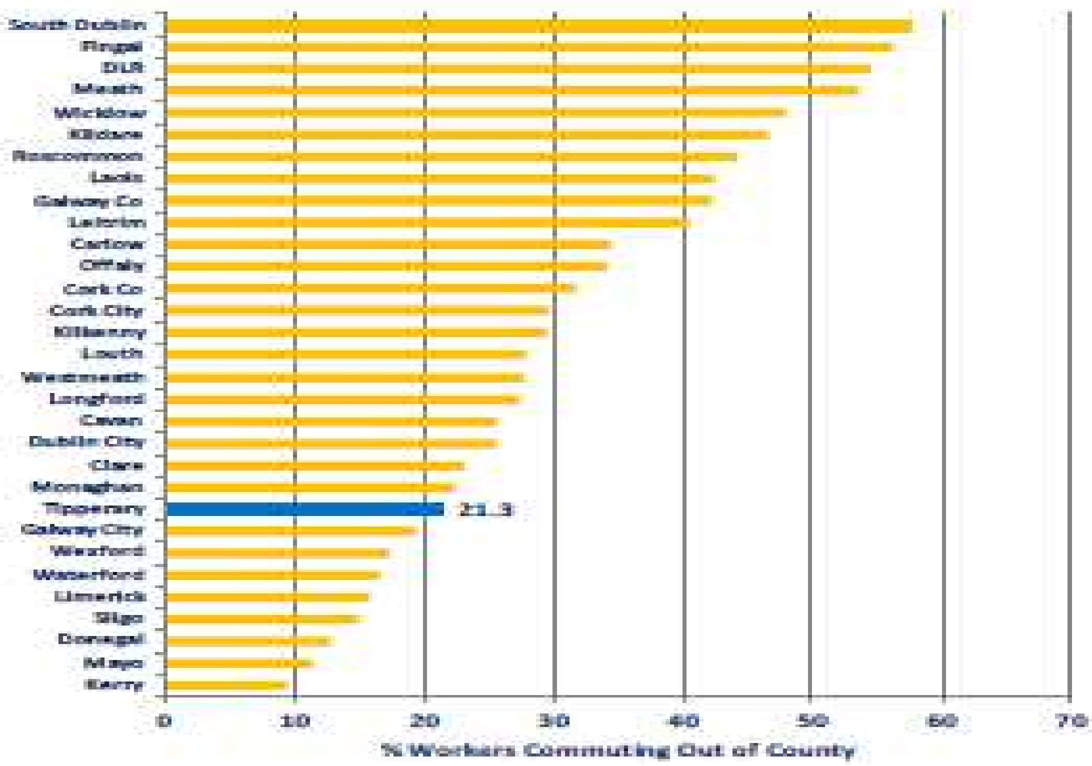
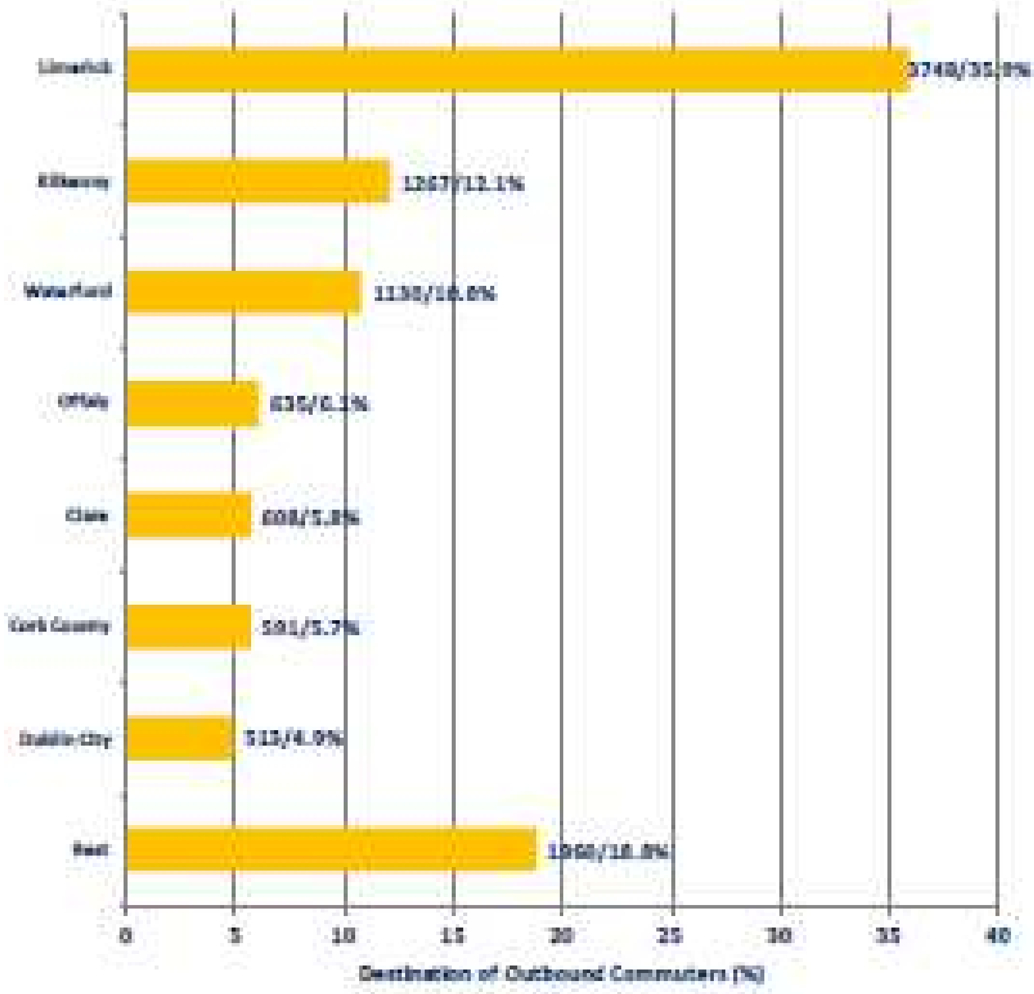


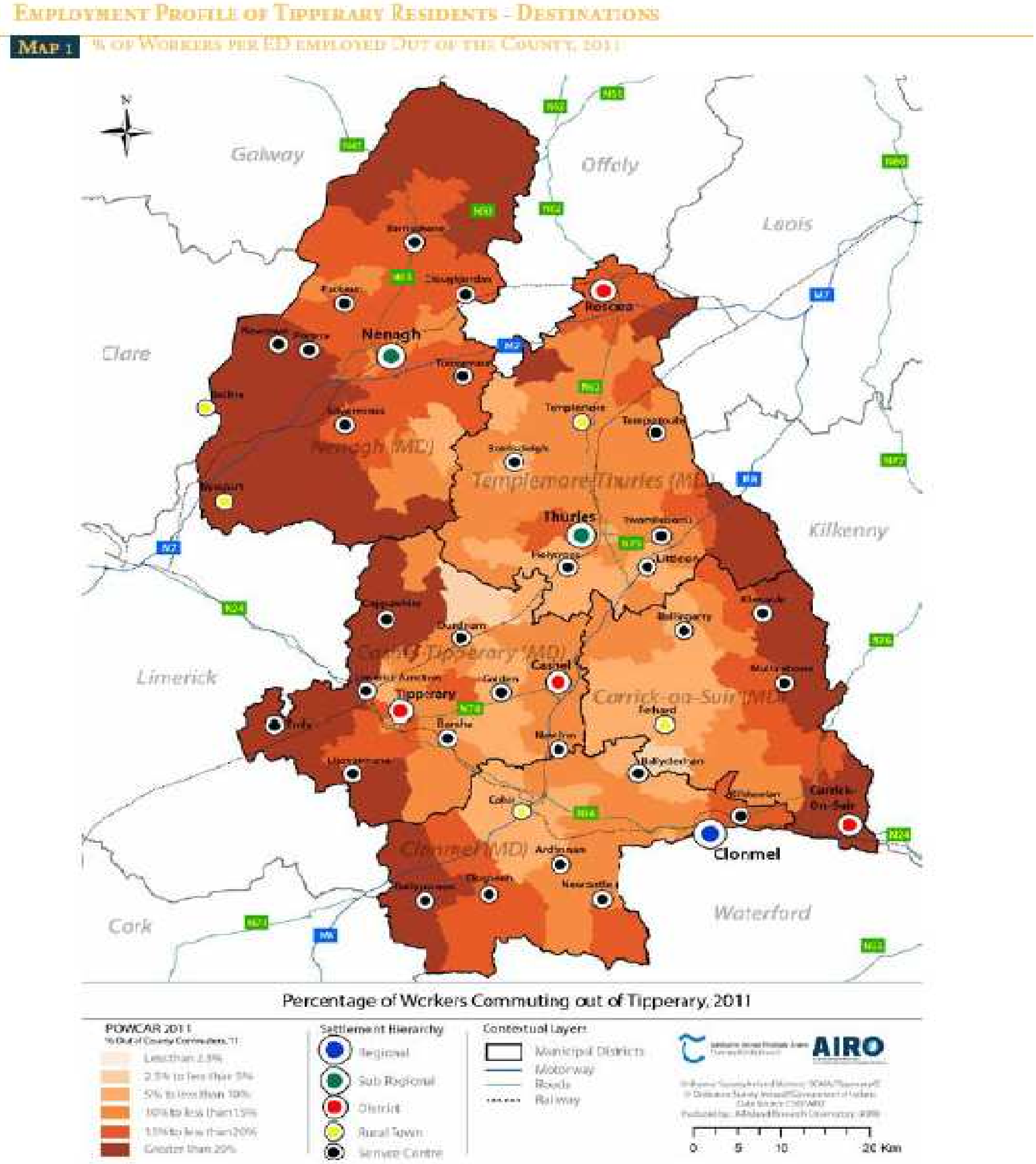
Figure 1 % Outbound Commuters, 2011



Destination of Tipperary Commuters 2011



Employment Profile of Co. Tipperary Residents - Destinations



Clonmel

According to Census 2011, there are 6,876 people residing in the Clonmel settlement area who are classed as being 'At Work'. Of these workers, a total of 65% (4,474) are employed in Clonmel, 12% (800) are employed elsewhere in Tipperary, 9% (635) commute out of the county for employment and the remaining 14% (967) are either Mobile workers are have a blank or uncodeable destination.

An additional 6,070 workers commute into Clonmel for employment every day. Of these, 66% (4,027) commute from elsewhere in Tipperary and the remaining 34% (2,043) commute from outside the county. The total number of jobs with a fixed location in Clonmel is therefore 10,544 and represents a net daily gain in working population of 4,635. The total number of jobs based in Clonmel represents 23.2% of all jobs located in the county.

Nenagh

According to Census 2011, there are 3,584 people residing in the Nenagh settlement area who are classed as being 'At Work'. Of these workers, a total of 57% (2,057) are employed in Nenagh, 12% (443) are employed elsewhere in Tipperary, 16% (559) commute out of the county for employment and the remaining 15% (525) are either Mobile workers are have a blank or uncodeable destination.

An additional 2,783 workers commute into Nenagh for employment every day. Of these, 80% (2,223) commute from elsewhere in Tipperary and the remaining 20% (560) commute from outside the county. The total number of jobs with a fixed location in Nenagh is therefore 4,840 and represents a net daily gain in working population of 1,781.

The total number of jobs based in Nenagh represents 10.7% of all jobs located in the county.

Roscrea

There are 2,156 people residing in the Roscrea settlement area who are classed as being 'At Work'. Of these workers, a total of 54% (1,160) are employed in Roscrea, 9% (195) are employed elsewhere in Tipperary, 19% (411) commute out of the county for employment and the remaining 18% (390) are either Mobile workers are have a blank or uncodeable destination.

An additional 1,393 workers commute into Roscrea for employment every day. Of these, 41% (569) commute from elsewhere in Tipperary and the remaining 59% (824) commute from outside the county. The total number of jobs with a fixed location in Roscrea is therefore 2,553 and represents a net daily gain in working population of 787.

The total number of jobs based in Roscrea represents 5.6% of all jobs located in the county.

Tipperary

According to Census 2011, there are 1,829 people residing in the Tipperary Town settlement area who are classed as being 'At Work'. Of these workers, a total of 47% (860) are employed in Tipperary Town, 24% (447) are employed elsewhere in Tipperary, 14% (254) commute out of the county for employment and the remaining 15% (268) are either Mobile workers are have a blank or uncodeable destination.

An additional 1,380 workers commute into Tipperary Town for employment every day. Of these, 74% (1,019) commute from elsewhere in Tipperary and the remaining 26% (361) commute from outside the county. The total number of jobs with a fixed location in Tipperary Town is therefore 2,240 and represents a net daily gain in working population of 679. The total number of jobs based in Tipperary Town represents 4.9% of all jobs located in the county.

T**hurles**

According to Census 2011, there are 3,136 people residing in the Thurles settlement area who are classed as being 'At Work'. Of these workers, a total of 53% (1,648) are employed in Thurles, 23% (718) are employed elsewhere in Tipperary, 10% (321) commute out of the county for employment and the remaining 14% (449) are either Mobile workers are have a blank or uncodeable destination.

An additional 2,090 workers commute into Thurles for employment every day. Of these, 88% (1,830) commute from elsewhere in Tipperary and the remaining 12% (260) commute from outside the county. The total number of jobs with a fixed location in Thurles is therefore 3,738 and represents a net daily gain in working population of 1,051.The total number of jobs based in Thurles represents 8.2% of all jobs located in the county.

Carrick on Suir

According to Census 2011, there are 1,777 people residing in the Carrick-on-Suir settlement area who are classed as being 'At Work'. Of these workers, a total of 35% (630) are employed in Carrick-on-Suir, 23% (400) are employed elsewhere in Tipperary, 24% (434) commute out of the county for employment and the remaining 18% (313) are either Mobile workers are have a blank or uncodeable destination.

An additional 751 workers commute into Carrick-on-Suir for employment every day. Of these, 34% (259) commute from elsewhere in Tipperary and the remaining 66% (492) commute from outside the county. The total number of jobs with a fixed location in Carrick-on-Suir is therefore 1,381 and represents a net daily loss in working population of -83. The total number of jobs based in Carrick-on-Suir represents 3% of all jobs located in the county.

Cahir

According to Census 2011, there are 1,660 people residing in the Cahir settlement area who are classed as being 'At Work'. Of these workers, a total of 45% (752) are employed in Cahir, 29% (477) are employed elsewhere in Tipperary, 9% (142) commute out of the county for employment and the remaining 17% (289) are either Mobile workers are have a blank or uncodeable destination.

An additional 979 workers commute into Cahir for employment every day. Of these, 80% (779) commute from elsewhere in Tipperary and the remaining 20% (200) commute from outside the county. The total number of jobs with a fixed location in Cahir is therefore 1,731 and represents a net daily gain in working population of 360. The total number of jobs based in Cahir represents 3.8% of all jobs located in the county.

Cashel

According to Census 2011, there are 1,886 people residing in the Cashel settlement area who are classed as being 'At Work'. Of these workers, a total of 41% (772) are employed in Cashel, 31% (585) are employed elsewhere in Tipperary, 9% (174) commute out of the county for employment and the remaining 19% (354) are either Mobile workers are have a blank or uncodeable destination.

An additional 1,228 workers commute into Cashel for employment every day. Of these, 86% (1,052) commute from elsewhere in Tipperary and the remaining 14% (176) commute from outside the county. The total number of jobs with a fixed location in Cashel is therefore 2,000 and represents a net daily gain in working population of 468. The total number of jobs based in Cashel represents 4.4% of all jobs located in the county.

Templemore

According to Census 2011, there are 919 people residing in the Templemore settlement area who are classed as being 'At Work'. Of these workers, a total of 44% (404) are employed in Templemore, 27% (250) are employed elsewhere in Tipperary, 16% (148) commute out of the county for employment and the remaining 13% (117) are either Mobile workers are have a blank or uncodeable destination.

An additional 645 workers commute into Templemore for employment every day. Of these, 77% (494) commute from elsewhere in Tipperary and the remaining 23% (151) commute from outside the county. The total number of jobs with a fixed location in Templemore is therefore 1,049 and represents a net daily gain in working population of 278. The total number of jobs based in Templemore represents 2.3% of all jobs located in the county.

One of the unique positive attributes of Co. Tipperary is that employment for the majority of citizens is contained within the county. This is of value from a "carbon footprint" perspective and also in that employment opportunities for the county lie within the county. There is a very significant opportunity to build on this strength thereby reducing the potential threat of encouraging unsustainable travel patterns and the threat of the county becoming a commuter belt for Limerick, Waterford or Kilkenny.

6.5 Rural Economic Development Zones (REDZ)

The Commission for the Economic Development of Rural Areas (CEDRA) identified the need to take a more tailored approach to planning at both a regional and local level and recognised that this approach should not be restricted by current administrative boundaries. The Commission believes this will require not only new systematic approaches but also a new cultural approach to planning that is focussed on participation and flexibility while centred on evidence of where the potential for economic development is situated. CEDRA identified the need for economic development strategies to be tailored to the needs and current or potential capacities of communities on the basis that it is at this geographic scale that economic development strategies are implemented.

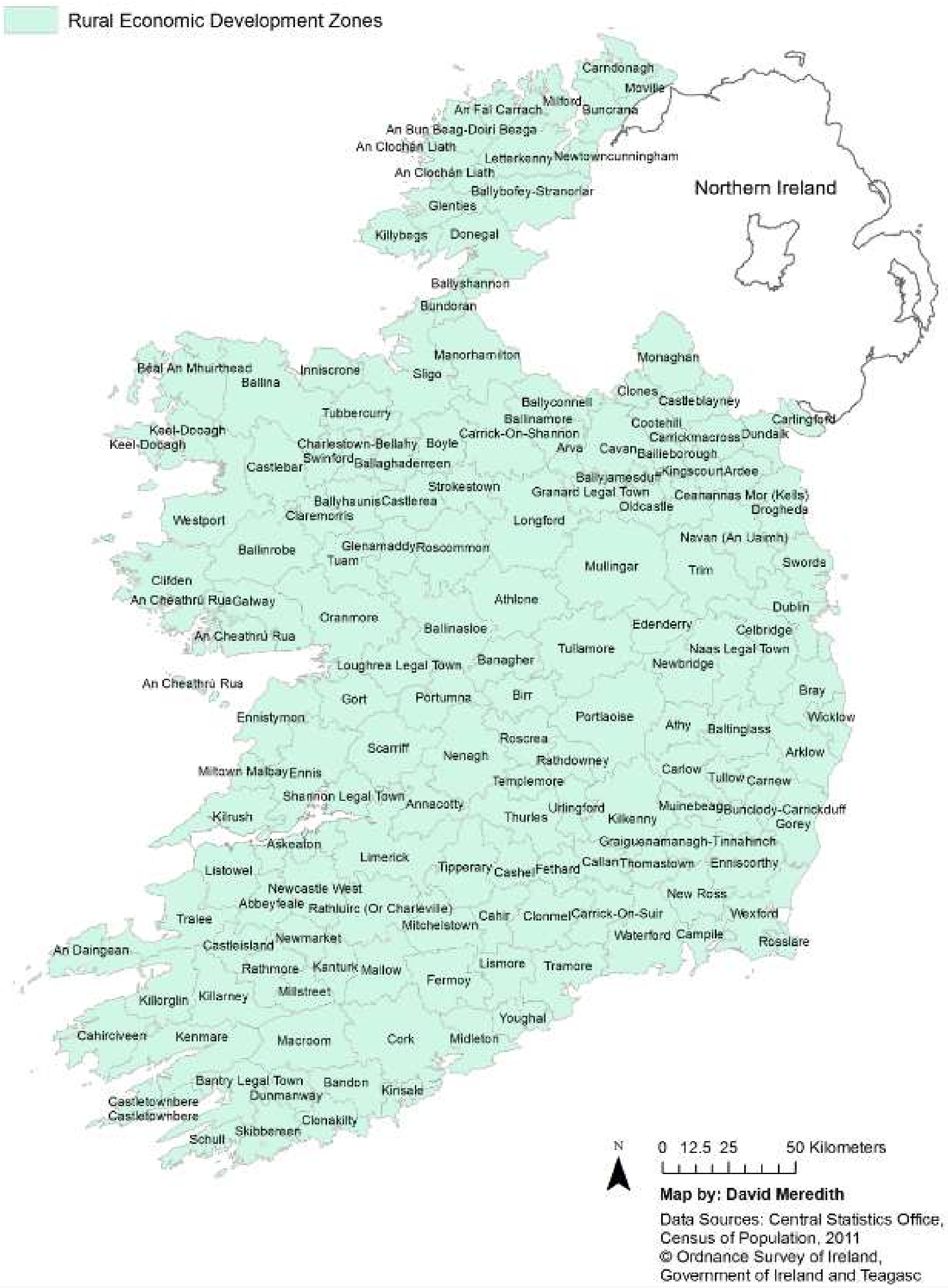
The evidence presented in the CEDRA report demonstrates that in general, there is a clear beneficial relationship between towns and the surrounding rural areas, i.e. the rural hinterland, and similarly between towns and larger towns and cities in close proximity. These hinterlands are local - with few exceptions they are smaller than counties - and they reflect Ireland's actual economic geography in that they are the spaces from which most employers in an area source labour. As such these functional areas represent an appropriate scale of intervention when attempting to foster rural economic development. Accordingly, it is particularly important that the LECP and other appropriate county strategies/plans support and prioritise the development of strong prosperous rural settlements.

REDZ encompass most of the resources available to enterprises and communities that an area has available to support economic development; most people live and work within these areas and employers source most of their employees from these zones. REDZ are functional rather than administrative geographic areas that reflect the spatial patterns of local economic activities and development processes - they are the sub-county zones within which most people live and work. Research surrounding this element of the CEDRA report identified potential Economic Development Zones in all areas of Ireland and recommended the implementation of a pilot initiative that supports the formulation of a localised strategic approach to the development of REDZ. The recommendation envisages full engagement with and participation by communities at a local level in order to foster a sense of ownership of the REDZ development process.

6.5.1 Aim of the Pilot REDZs Initiative

The aim of this pilot initiative is to support 18 REDZ proposals accross the regions at different geographic scales throughout Ireland with a view to determining best practice with regard to how such projects should be initiated, designed, implemented and evaluated. The REDZ provides a unique opportunity to progress appropriate economic development in rural areas. The following areas were identified as REDZ in Co. Tipperary – Clonmel, Nenagh, Thurles, Cashel, Tipperary, Roscrea, Cahir, Carrick-on-Suir, Templemore and Fetherd. Early indications are that a number of the actions contained in the LECP are eligible to be incorporated in any proposal(s) submitted for REDZs in Co.Tipperary. These actions are multi-sectoral and are applicable to a number of REDZs identified in the county.

Rural Economic Development Zones



7. Enterprise - Co. Tipperary

In County Tipperary, enterprise consists mainly of indigenous enterprises operating across a range of sectors. In particular, microenenterprises operating accross a variety of sectors, including manufacturing and retail, contribute significantly to job creation. The LECP recongnises the need to provide the necessary supports to sustain and grow this sector as appropriate.

7.1 Microentеprise, SMEs, & Large Enterprise

Foreign Direct Investment companies are largely concentrated in Clonmel, with a presence also in Nenagh and Templemore, and are supported by the IDA. Indigenous businesses operate across the county and consist of SMEs supported by Enterprise Ireland and microenterprise supported by the LEO, Tipperary County Council and also the Local Development Companies.

7.1.1 Local Enterprise Office - Microenterprise in Co. Tipperary 2013

The LEO provides supports to early stage promoters, start-ups and small business looking to expand - micro businesses with 10 or less employees.

Microenterprise Companies in Operation Supported by County Enterprise Boards (CEBS) 1993 - 2013

County Enterprise Board	No. of Supported Companies	No. of Service Companies	No. of Manufacturing Companies	Employees		
				Full - Time	Part - Time	Total
North	168	93	75	382	161	543
South	166	83	83	643	351	994
Total	334	176	158	1025	512	1537

Source – Employment Survey 2013, North & South Tipperary County Enterprise Boards[3]

The above table shows the number of businesses operating which were supported by CEBs from the inception of CEBs in 1993 to 2013. As can be seen, a total of 334 microenterprises employing 1025 full-time employees and 512 part-time employees have been supported by North and South Tipperary CEBS, of which 176 businesses operated in the services sector and 158 in the manufacturing sector.

Microenterprise Projects Approved 2011-2013 by CEBs in Co. Tipperary

County Enterprise Board	No. of Projects Approved	Manufacturing Companies %	Service Companies %	Start-Up Companies %	No. of Business Expansions %	Male Grantees %	Female Grantees %
North	64	67%	33%	66%	34%	75%	25%
South	59	68%	32%	53%	47%	73%	27%
Total	123	67.5%	32.5%	59.5%	40.5%	74%	26%

Source – North & South Tipperary County Enterprise Boards

[3] Local Enterprise Office, Tipperary, from June 1st 2014.

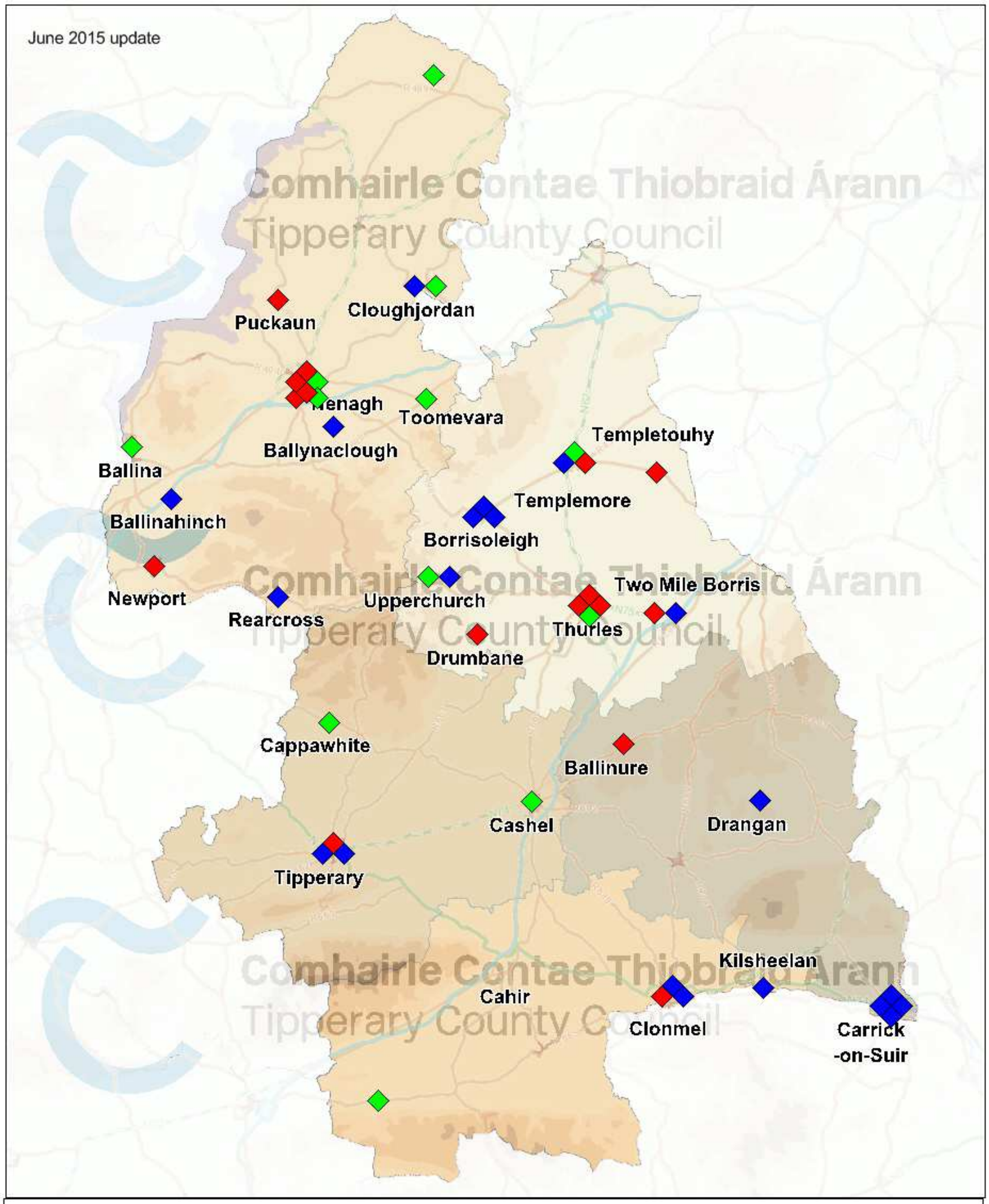
The number of projects approved LEO/CEB funding from 2011 to 2013 was 123 which was an average of 41 per annum. Average number of Start-Ups per annum was 24 while the average number of Business Expansions was 17 approximately. It is of interest to note that the % of start-ups in the north of the county are twice as high as the level of business expansions whereas in the south of the county the % difference is less noticeable between the two categories. This data provides a useful baseline against which to assess activity over the duration of the LECP.

Since the establishment of the LEO Tipperary in Tipperary County Council in 2014 mapping of the type and amount of grant aid allocations has been ongoing as illustrated in the following maps. Currently, owing to the early stages of this process the maps are an indication of microenterprise start-up and expansion in the county as based on grant approval since July 2014 only. Over time it is envisaged that this mapping exercise together with analysis of additional relevant quantitative and qualitative data will provide an assessment of microenterprise activity in the county. This will be particularly beneficial in terms of monitoring progress on LECP targets for the microenterprise sector.

The following maps show that during the period July 2014 to June 2015:

- Number of grants allocated by type was 22 Priming, 14 Business Expansion, and 12 Feasibility Study Grants
- The greatest amount of funding allocations were made to businesses in Clonmel, Nenagh, followed by Thurles, Borrisoleigh, Templtuohy, Carrick-on-Suir, and Tipperary
- Grant-aid was allocated to support creation of 68 full-time jobs and 16 part time jobs.

LEO Approvals by Grant Type & Allocation July 2014 – June 2015



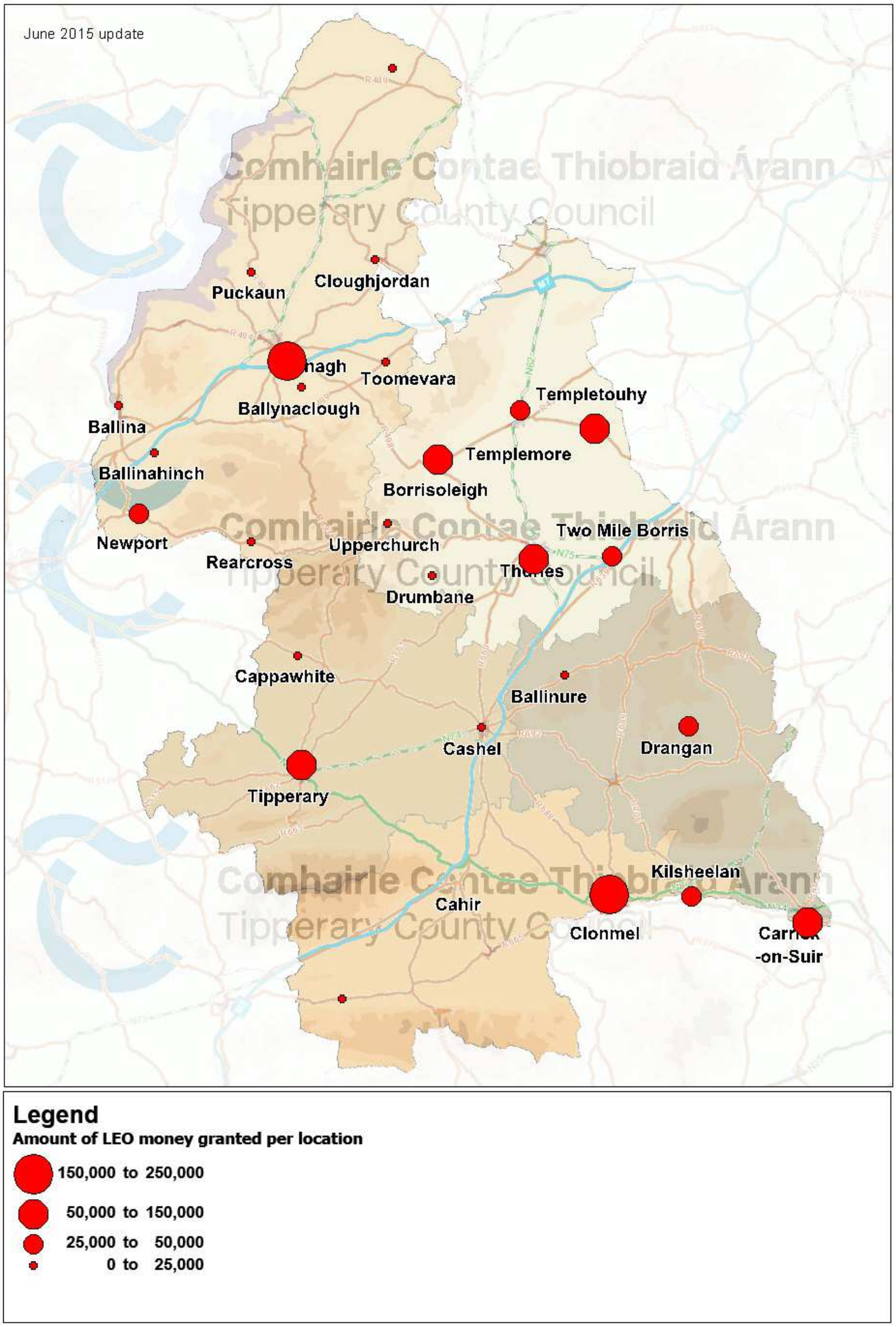
Legend

LEO grants by type per location

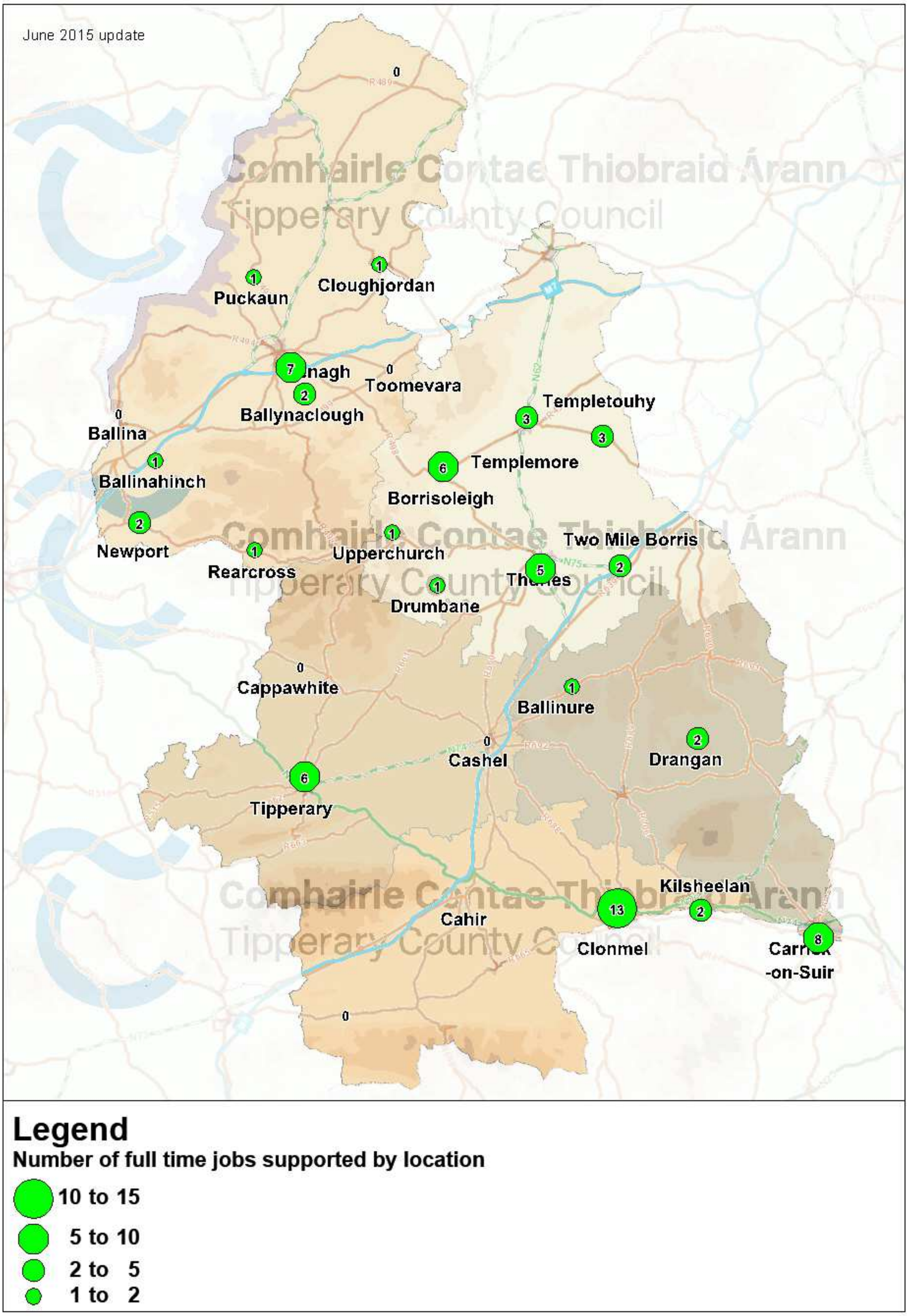
- **Business Expansion Grant**
- **Feasability Study**
- **Priming Grant**

Source: LEO, Tipperary County Council

Amount of LEO Allocations per Location



No. & Location of LEO supported FT Jobs – July 2014 to June 2015

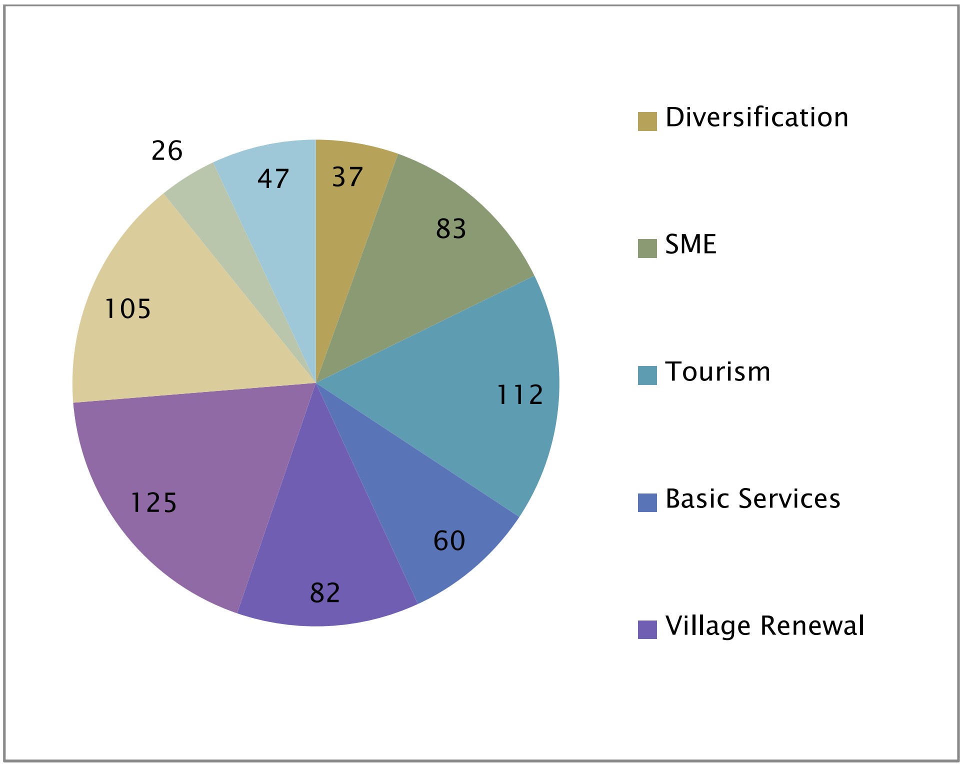


No. & Location of LEO Supported PT Jobs – July 2014 to June 2015

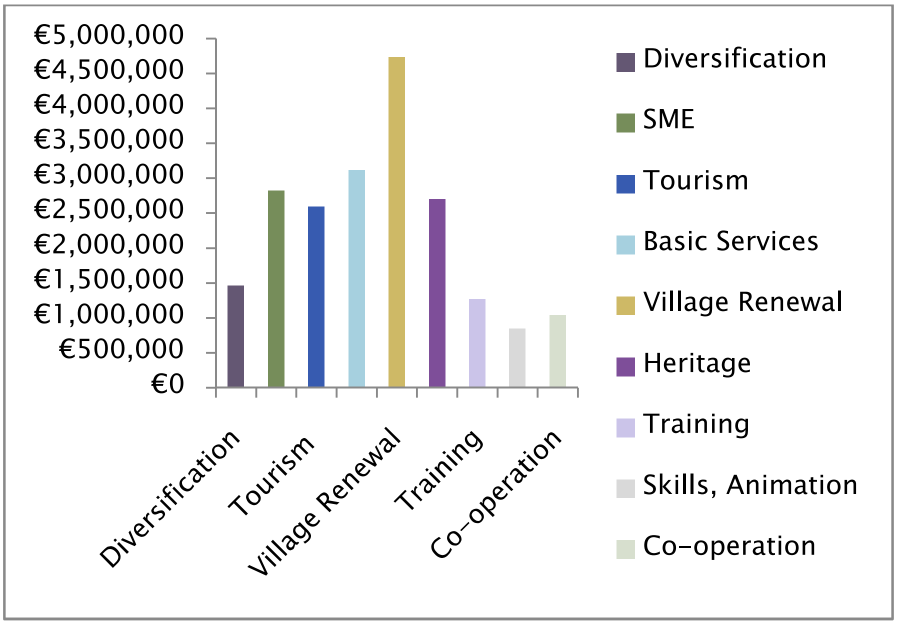
7.1.2 Local Development Company Supports

The Rural Development Programme 2007 -2013 was delivered in Co. Tipperary by two local development companies – North Tipperary LEADER Partnership with a remit in North Tipperary and South Tipperary Development Company operating in South Tipperary. The following gives an outline of number of projects supported and allocations under the under the various measures under the RDP Programme 2007 – 2013 in the county.

No. of RDP 2007 – 2013 Funded Projects by Measure in Co. Tipperary



RDP 2007 – 2013 Spend by Sector in Co. Tipperary



Source: LDCs, Co. Tipperary

In terms of economic activity 37 diversification projects, 83 SMEs, and 112 tourism initiatives were supported. Approximate grant-aid expended on these projects was €6.75m.

7.1.3 Enterprise Ireland Supported Companies in Co. Tipperary in 2013

Enterprise Ireland's priority is the achievement of export sales growth from Irish-owned companies employing or having the potential to create a business employing more than 10 employees. Enterprise Ireland works with entrepreneurs and business people across the full business development spectrum - from early-stage entrepreneurs, to established business owners and Irish multinational companies. Clients include 'High Potential Start-Ups (HPSUs)'with the capability to start a business and sell in export markets; established manufacturing and internationally traded services businesses that are Small or Medium sized Enterprises (SMEs); and large companies (employing more than 250).

Enterprise Ireland supported companies in Co. Tipperary in 2013 totalled 129 companies. Sectors in which these companies are engaged include food & beverages, agriculture, forestry, energy, metal and glass manufacturing. As can be seen from the table below in 2013 the greatest number of EI supported companies was in the southern part of the county. However employment in EI client companies was greater overall in the northern part of the county. Companies in the south suffered 305 full-time job losses compared to 81 full-time job gains while in the northern area there were 161 full -time job gains as opposed to 21 full-time job losses.

EI Supported Companies in Co. Tipperary 2013

Data	North Tipperary	South Tipperary	Total
No. of plants	53	76	129
Full- Time Jobs	2,121	2,098	4219
Full – time Gains	161	81	242
Full – Time Losses	20	305	325
Full – Time Change	141	-224	-83
Other Jobs	293	341	634

(Source: Enterprise Ireland)

HPSUs are major contributors to job creation and economic growth. The number of HPSUs in a region is a good indicator of the level of innovation in the area. There were no HPSUs in Co. Tipperary in 2013 and during the period 2008 – 2013 there were 8 HPSUs in Co. Tipperary. Research indicates that a significant number of HPSUs emerge from local, highly experienced FDIs which signifies the importance of attracting and retaining such companies in the area. The number of innovation Vouchers issued in the county in 2014 was 23 and the number of Innovation Partnerships was 4.

The LECP advocates an increased focus on the development of an innovation culture in the county and recommends the development of an innovation strategy to identify how this will be progressed. Indicators of this innovation culture will be the number of Innovation Vouchers and Innovation Partnerships activated and the number of HPSUs in the county per annum.

7.1.4 IDA Ireland Supported Companies in Co. Tipperary

IDA Ireland Companies, Jobs & Itineraries in Co. Tipperary

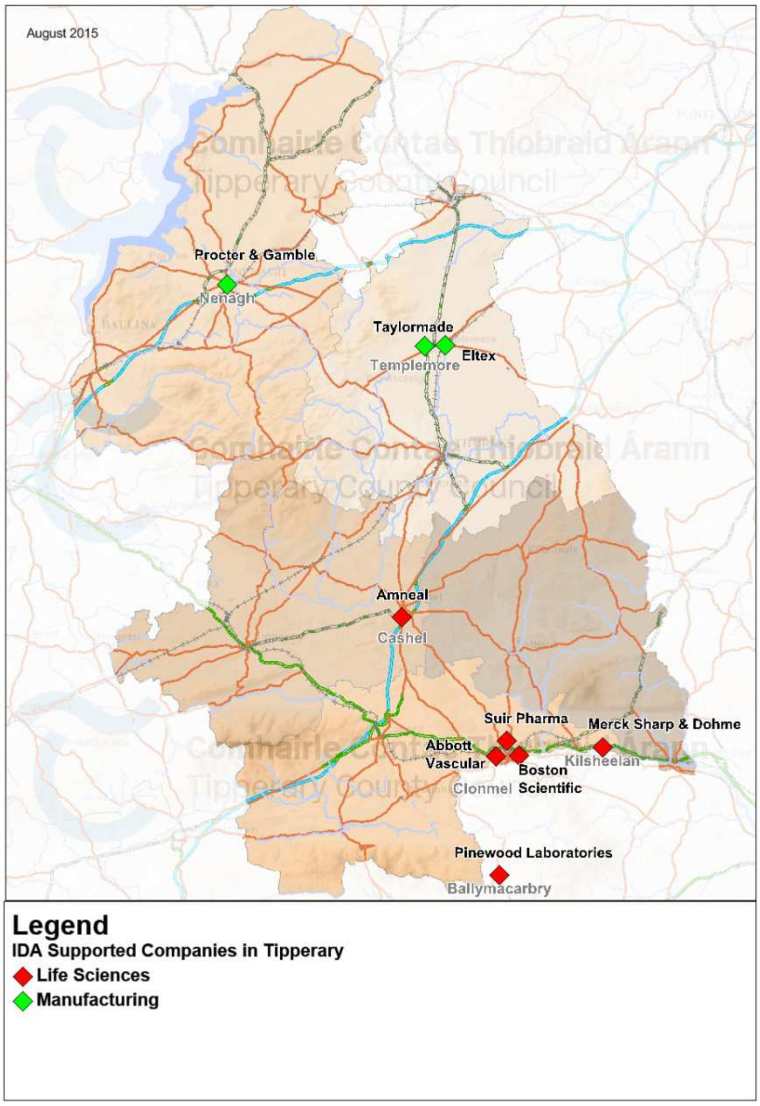
County	No. of Companies – 2014	Total Jobs - 2014	New Jobs Created - 2014	Site Visits - End June 2015
North Tipperary	3	326	16	4
South Tipperary	8	3,044	48	4
Co. Tipperary	11	3,370	64	8

Source: IDA Ireland

In the northern part of County Tipperary there are three FDI companies. In 2014 these companies employed 326 people, inclusive of 16 jobs created in 2014. Two of these are US companies – Procter & Gamble in Nenagh and Taylormade in Templemore. Procter & Gamble, which manufactures Beauty Care & Home Products, has been in business in Nenagh since 1978 and serves consumers in more than 180 countries. Operating its facility in Templemore since 1987, Taylor Made Glass & Systems produces tempered glass products, windshields, windows and doors for a myriad of markets. The third company Eltex, established in 1976 in Templemore, produces textile tension sensors.

In 2014 there were 8 IDA Ireland supported companies located in the Clonmel and Cashel area. The key industry sector for these companies is Life Sciences, which accounts for circa 99% of FDI employment. The largest FDI employers are Abbott Vascular (Med Tech – 1,161) and Boston Scientific (Med Tech – 838) followed by Merck Sharp & Dohme (409), Pinewood Laboratories (323), Suir Pharma (161), and Ranbaxy Ireland Ltd (114). Total employment for the 8 FDI companies operating in the southern part of the county in 2014 was 3,044 employees. New jobs created in 2014 were 48. In July 2015 IDA Ireland announced that Amneal Pharmaceuticals LLC, a US based generic drugs manufacturer, had purchased the Johnson & Johnson facility in Cashel. The Cashel site will be dedicated to R&D production and high-end speciality medications. Amneal expects to hire an estimated 250 -300 employees at full build-out.

IDA Ireland Supported Companies in the County 2015



In marketing the southern part of Co. Tipperary for new foreign direct investment, IDA Ireland is focused on attracting overseas companies in the services and knowledge based industries (including advanced manufacturing). However, the service type companies tend to migrate to the larger urban centres. The development of the Ballingarrane Estate in Clonmel, which incorporates the IDA Business Park (50 acres) and the LIT Tipperary campus are a key asset in attracting further overseas investment into the county. It should be noted that there has not been any new foreign direct investment in the northern part of the county since 1987.

In parallel with developments on the property side, IDA Ireland continues to work closely with third level educational institutions in the region so that the skill sets necessary to attract high value added employment to the county are being developed. Limerick Institute of Technology - Tipperary & Limerick, Institute of Technology Carlow, and Waterford Institute of Technology are key resources that will be critical to the attraction and maintenance of overseas companies in the county. In addition the geographic location of Co. Tipperary allows for ease of access to the universities of Cork and Limerick and allows the research potential offered by these institutions to be exploited for the benefit of the county.

In the FDI sector 60% of new jobs come from expansion by the existing client base. County initiatives to support such expansions are very important such as Development Levies and service provision to clients in the areas of water, effluent, and land for company expansion. Training and upskilling initiatives are also very important. In terms of 'new name' investments these are predominantly 'urban centric'. 'New name' investors require locations of scale particularly relating to skill sets, world class property, and communications infrastructure. A key challenge is getting investors to consider town locations especially when cities of scale have attractive offerings. IDA Ireland has a regional remit and their focus is on marketing only a number of key selected areas that meet their market needs. This has implications for Co. Tipperary and needs be addressed by the county in a practical manner. In terms of attracting FDI investment to the county priority needs to be given in the Economic Plan for Co. Tipperary to the development and the further enhancement of those locations where there is evident linkages with third level institutions; where there is or will be the provision of necessary critical infrastructure to meet their needs; where the availability of skill sets is clearly evident; where quality of the environment is prioritised and where there is a strong emphasis on quality of place.

The LECP recognises the need for provision of appropriate economic opportunity throughout the county as identified at stakeholder meetings and through the public consultation process. In order to secure FDI, locations must have property solutions suitable to meet investor needs whether that is office or commercial property requirements.

It is proposed to focus large scale FDI property opportunities in Clonmel and Nenagh where there are already existing FDI clusters in life sciences and manufacturing. The Lisheen Mine, Thurles, is also another site which may have potential as a site for FDI opportunities. In addition, IDA Ireland will be focussed on managing its existing client base.

7.2 Entrepreneurship, Youth Entrepreneurship, & Female Entrepreneurship

An entrepreneurial culture is an essential component to any thriving economy, be that national, regional or local. Research published by the Central Bank in 2013 showed that 67% of new job creation comes from companies in their first five years of business. The *Global Entrepreneurship Monitor* (GEM) shows in its 2013 report that Ireland ranked second across the EU-15 and ninth across the EU-28 in total early stage entrepreneurial activity (TEA) and that Ireland is performing relatively well in such entrepreneurship characteristics as human capital, internationalisation and encouraging high-growth companies. However, relative to the national picture, Co. Tipperary is performing poorly when one assesses its uptake of innovation partnerships and HPSUs. Areas which require attention include opportunity perception, the proportion of female entrepreneurs, fear of failure, risk capital and start-up skills. An entrepreneurship ecosystem needs to incorporate the following key elements:

1. Culture, human capital and education
2. Business environment and supports
3. Innovation
4. Access to finance
5. Entrepreneurial networks and mentoring
6. Access to markets

The *Entrepreneurship in Ireland Policy Statement 2014* has set the following targets for the next five years:

- Increase the number of start-ups by 25% (3,000 more start-ups per annum)
- Increase the survival rate in the first five years by 25% (1,800 more survivors per annum)
- Improve the capacity of start-ups to grow to scale by 25%.

Fostering entrepreneurial initiatives, mind-sets and skills is a priority within the Co. Tipperary LECP. Much has been done by agencies and organisations to date in this regard. An example is entrepreneurship support service initiatives delivered by the LEO in TCC which include various programmes and award schemes at county level. These include the County Enterprise Awards Scheme and Ireland's Best Young Entrepreneur (IBYE) Scheme which recognise and reward entrepreneurs for their endeavours. In addition the LEO's Student Enterprise Awards Scheme introduces second level students to the option of business creation as a career opportunity.

In order to build a strong pipeline of future business start-ups there will be a concentration in the LECP on entrepreneurship, and particularly on youth entrepreneurship and female entrepreneurship. In addition, there will be an emphasis on fostering a culture of enterprise innovation through innovation programmes, growing the number of HPSUs in the county, and the pursuit of private equity investment funds for emerging enterprises. A consideration also in terms of local policy is a finding contained in the GEM Report 2013 that 40% of early stage entrepreneurs initially start their new business from home.

7.3 Tourism

In March 2015 the Department of Transport, Tourism & Sport published its policy framework for tourism for the next ten years 'People, Place and Policy – Growing Tourism to 2025'. The focus of this policy is to maximise the export contribution of tourism while protecting key assets that are our natural, built and cultural heritage. It also involves a change of focus from overseas visitor numbers to overseas visitor revenue.

Rural tourism plays a very significant role in the rural economy of County Tipperary. The County's tourism strengths are its heritage product which includes key visitor attractions The Rock of Cashel and Holycross Abbey; its uplands – Knockmealdown, Galtee, Comeragh and Slieve Felim Hills; the River Suir and Lough Derg which provide potential for outdoor recreation. As the area had been considered underdeveloped in terms of tourism its development has been a priority for the local authority and local development companies for the past number of years, particularly the development of the Munster Vales and Lough Derg as international tourism propositions. As a result effort has been expended on developing tourism infrastructure and product. This has included the provision of tourism facilities in the lakeside villages of Terryglass, Dromineer, Garrykennedy, and Ballina under the Lough Derg International Waterpark Project; the upgrading and enhancement of national waymarked ways and the development of National Trails Office approved looped walks throughout the county; development of cycle routes; the development of the Butler Trail; and investment in private tourism enterprises under the Rural Development Programme. Following on from the merger of the North and South Tipperary County Councils, the two tourism companies which were responsible for tourism promotion in North and South Tipperary have been replaced by an all county tourism company which is responsible for tourism marketing and promotion.

In 2013 Co. Tipperary had 168,000 overseas visitors which generated €53m in overseas visitor revenue. Co. Tipperary ranked 13th (together with Co. Kildare) in the 26 counties in terms of overseas visitor numbers and 10th in terms of overseas visitor revenue.

The following table indicates the ranking of Co. Tipperary in terms of other counties:

Overseas Visitors (000s) & Revenue to Counties in 2013

Overseas Visitor Numbers & Revenue to Counties in 2013					
County	**Ranking**	**Overseas Visitor No.s (000s)**	**County**	**Ranking**	**Overseas Visitor Revenue €mm**
Dublin	1	3,998	**Dublin**	1	1,401
Cork	2	1,228	**Cork**	2	433
Galway	3	1,028	**Galway**	3	308
Kerry	4	877	**Kerry**	4	183
Clare	5	485	**Limerick**	5	135
Limerick	6	420	**Clare**	6	94
Wexford	7	229	**Wicklow**	7	70
Waterford	8	225	**Donegal**	8	63
Mayo	9	218	**Mayo**	9	60
Kilkenny	10	207	**Wexford**	9	60
Tipperary	13	168	**Tipperary**	10	53

Source: Fáilte Ireland 2014

A key strength of the county is that it contains propositions which fall within Fáilte Ireland recognised international tourism destinations - Lough Derg which is part of the Lakelands Destination; and the Munster Vales which incorporates the The Galtee, Knockmealdown, and Comeragh Mountain ranges which is part of Ireland's Ancient East - both of which are inter-county tourism propositions.Therefore the LECP recognises the potential of tourism to contribute significantly to economic development throughout the county. In order to effectively develop the tourism sector in the county there needs to be a focus on these areas where there is potential to capitalise on demand within international and national markets as appropriate. In turn, spillover from these areas will benefit the whole county.

The development of a *Co. Tipperary 'Tourism Marketing, Experience and Destination Development Plan'* has been identified as a priority under the LECP. This plan, which will be market led, will focus on building product in key areas and the implementation of a targeted marketing plan in order to develop a high quality visitor destination and experience. Key market segments from international markets with the greatest prospects to grow visitors to the area are the 'Culturally Curious' and the 'Great Escapers'[4]. These visitors are independent active sightseers looking to explore new places to broaden their minds. Seeking rich and diverse experiences, they like to immerse themselves in places that offer rich history and local culture, alongside stunning landscape. The development and marketing of the outdoor recreation product – River Suir Activity Hub, walking, cycling - to the domestic market will also be addressed. Critical to the implementation of the plan will a focus on 'experience' as opposed to 'place' for the visitor, effective targeted marketing and promotion; engagement by the tourism trade in cross-selling; trade linkages with the retail and community sectors to maximise the visitor offering and experience; and adequate resources to address any product and/or infrastructural deficits.

7.4 Retail

The wholesale and retail sectors in Ireland employ 270,000 people - the largest share of employment in the Irish economy. The retail sector is an important contributor to local and rural economies and is instrumental to the survival of vibrant towns and villages. As a result of the recession the sector

[4] People, Place and Policy – Growing Tourism to 2025

experienced a downturn as people had less disposable income and as a result reduced consumer spending. Other issues affecting the retail sector have been the growth in out-of-town retail development; the growth in online shopping; weakening town centre retail mix; availability of car parking; and changing consumer behaviour.

Under the *Action Plan for Jobs 2014* a Retail Consultation Forum was established to allow for engagement between Government and the retail sector to identify actions which can be taken by government departments and/or the sector itself to address key challenges. Retail Excellence Ireland in '*A Strategy for Rural Retailing*' identifies a number of strategic actions that can be implemented to revitalise town centres. These include achieving a balanced retail mix, town branding, streetscape enhancement, and appropriate and accessible car parking. In particular, the strategy advocates a 'Town Team' approach to achieve delivery of such actions.

As with other towns throughout Ireland towns and villages have not been immune to the economic downturn and also changes within the retail sector – for example increases in online purchasing, competitive pricing by the multiples and discounters etc. Towns in Co. Tipperary included in '*Town & City Review 2012*' undertaken by Retail Excellence Ireland in 2012 were Clonmel, Nenagh, Thurles, Cahir, Carrick-on-Suir, Roscrea, and Tipperary. In all 100 towns/cities were included in the review which asked a sample of stakeholders and citizens what they consider are the most important factors for a consumer in deciding to visit a town/city; how citizens rate their town/city; and how stakeholders rate their town/city. The top five towns were Westport, Co. Mayo; Killarney, Co. Kerry; Swords, Co. Dublin; Ashbourne, Co. Meath and Dungarvan, Co. Waterford. None of the aforementioned towns in Co. Tipperary featured in the top 25 towns/cities. The reasons why the top towns & cities performed best were:

- Retention of a significant proportion of retail activity in the town or city centre
- Professional, broad and engaging retailing mix
- Good dining and entertainment mix
- Local population size which accommodates a mix of multiple retailers and specialist independents
- Welcoming car parking cost and enforcement policy
- Adequate and accessible stock of car parking spaces
- Structured and organised stakeholder group
- Significant civic and stakeholder pride in their town or city
- Well maintained and presented streetscapes
- Host events and deliver other reasons for citizens to engage with the public realm
- Positive and engaging town or city image
- Progressive, engaged and involved local government team
- Understand that lower car parking charges will increase frequency of town visit.

Rating of Towns in Co. Tipperary included in REI 'Town & City Review 2012'

<table>
<tr><th>Top Quartile</th><th>2nd Quartile</th><th>3rd Quartile</th><th>4th Quartile</th></tr>
<tr><td rowspan="3">None</td><td>Clonmel</td><td>Nenagh</td><td>Carrick-on-Suir</td></tr>
<tr><td rowspan="2">Cahir</td><td>Roscrea</td><td rowspan="2">Tipperary</td></tr>
<tr><td>Thurles</td></tr>
</table>

(Source: Retail Excellence Ireland)

As can be seen from the above table, of the seven towns in Co. Tipperary that were included in the REI '*A Town & City Review 2012*' none were included in the top 25 towns. Clonmeland Cahir were included in the second quartile; Nenagh, Roscrea and Thurles in the third quartile; and Carrick-on-Suir and Tipperary in the bottom quartile.

A key issue raised during the public consultation process for the Local Economic and Community Plan was the economic decline of towns and villages in County Tipperary. Vibrant and attractive towns and villages are critical components of the local economy. They contribute to local employment, serve local and tourism markets, and contribute to quality of life generally. They also play a role as an attractor in terms of enterprise development and investment. In an attempt to support the retail sector to address the decline of key towns in the county, Tipperary County Council is introducing a 'Town Centre' Initiative which will be rolled out across the following towns – Clonmel, Nenagh, Thurles, Roscrea, Cashel, Tipperary, Cahir and Carrick-on-Suir by the end of 2015. A retail expert will be contracted work with Town Centre Groups in each of the towns to develop a plan outlining short, medium and long term action to be progressed in each town centre on a partnership basis. These will be supported by council initiatives such as painting schemes, a Commercial Incentive Scheme to be rolled out on an all county basis, town centre, car parking strategy, grants to local groups for events, and LEO supports as relevant. The work commenced under this initiative needs to be progressed and prioritised under the LECP.

7.5 Agriculture & Food Industry

Agriculture is Ireland's largest indigenous sector. Agri-food exports reached a record high of nearly €10bn in 2013, with continued growth of almost 11% in the first half of 2014 Agriculture supports a significant number of jobs in County Tipperary, both directly in food and drink processing and also in the wider agri-industry, for example input suppliers, agricultural contractors, auctioneering, transport, engineering, accountancy, legal, veterinary and other advisory services. The total number of food and drink processing jobs supported by agricultural output of the county is 4270 as opposed to 12,499 in the Mid-West and South East Regions (IFA, 2014).

The county has 7,738 farms, accounting for 312,953 hectares of land with the average farm size being 40.44 hectares. The most popular farm sizes were 30-50 hectares (1,983 farms) followed by 50-100 hectares (1,856 farms). There were 2,334 farms (30%) with less than 20 hectares and 394 with more than 100 hectares. The most common use for the land was as pasture (177,789 hectares), followed by silage (83,728 hectares).There were 25,240 hectares given over to crops, 21,059 of which were used for cereals. Just 356 hectares were used for potatoes. There were 599,079 cattle on the county's farms, 171,095 sheep and 8,818 horses.

FARM STRUCTURE, INCOME & DIRECT PAYMENTS		VALUE OF OUTPUTS & EXPORTS	
No. of Farms	7,739	**Value of Agricultural Output**	€604m
Average Farm Size	40.5 ha		
Land Area Farmed	312,953 ha	**Value of Forestry Output**	€ 6m
Land under Private Forestry	23,013 ha		
Farm Income	€192m	**Value of Agricultural Exports from Agricultural Output**	€832m
Direct Payments	€123m		

(Source: IFA 2014)

On the Tipperary farms, there were 7,720 holders, 2,658 spouses, 4,103 other family members and 1,215 non-family farm workers. The most common ages of the holders were 45-54 years (2,086) and 55-64 (1,837). There were 1,652 over 65 years and just 541 were under the age of 35 years. There are 332 farmers in Tipperary in receipt of Farm Assist payments. Indications from the *Farm Viability – A Teagasc*

National Farm Survey Analysis concludes that a third of all farms are vulnerable and approximately a third of all farms are sustainable because of off-farm income. Farms in cattle and sheep are considerably more vulnerable in terms of viability. The greatest number of viable farms are located in the South East while the Border area has the least amnt of viable farms.

It is expected that the removal of the milk quota in 2014 will result in an increase in milk production in Ireland - it is expected that the country will produce an extra two billion litres of milk a year by 2020 - and a reduction in the number of dairy farms in the long-term. Currently there are almost 18,000 dairy farmers producing 5.5bn litres of milk annually, most of which are concentrated in the south of Ireland. The average number of cows per herd is approximately 60. As can be seen below the largest concentration of farmers is in Co. Cork which has nearly a third of the national herd.

County	No. of Dairy Farms	County	No. of Dairy Farms
Cork	4,277	Waterford	773
Limerick City & County	2,444	Wexford	764
Tipperary	1,779	Cavan	665
Kerry	1,595	Monaghan	648
Kilkenny	883	Clare	606

Source – Teagasc 2013

However, it is expected that the number of dairy farms will reduce to between 12,000 and 15,000 by 2020 and the average herd numbers per farm will subsequently increase.

Potential impacts in terms of restructuring and growth in the milk sector could have adverse implications for the environment. Concerns have been raised that Ireland could follow in the footsteps of New Zealand where expansion in the dairy industry impacted on the environment and the food chain. However, there are opportunities in terms of potential for innovation in the agri-tech sector which could result in solutions to any adverse impacts. Another concern is that farmers will have over extended themselves financially in upscaling to meet post quota demand. Monitoring of developments in the sector post quota removal will be required to ensure that any negative impacts can be addressed and any opportunities are realised.

The agriculture and food industry in Ireland accounts for 9% of employment and 10% of exports. As much as 65% of manufacturing exports by Irish owned companies are estimated to consist of food and drink. Growth targets under *Food Wise 2025* are as follows:

- Increasing the value of agri-food exports by 85% to €19 billion
- Increasing value added in the agri-food, fisheries and wood products sector by 70% to in excess of €13 billion
- Increasing the value of Primary Production by 65% to almost €10 billion
- The creation of an additional 23,000 direct jobs in the agri-food sector all along the supply chain from primary production to high valued added product development.

Ireland scores strongly when it comes to food safety, quality ingredients, natural environment, and a heritage of food production through a family farm culture. Food producers need to develop and promote key points of differentiation to maintain and develop market position owing to competitive retail and food service landscape. In terms of export markets global demand for dairy products is expected to increase by 30% by 2020 and meat demand is expected to rise by 14%. An EU market of 500 million relatively affluent customers offers considerable potential for Ireland. Co. Tipperary to gain share of same if issues of scale and fragmentation within sectors is addressed. External factors which affect competitiveness are the business and regulatory environment (energy price setting, labour etc.) which needs to be reviewed regularly. In order for the industry to compete in terms of innovation increased interaction with end customers and consumers is critical.

Co. Tipperary also has a strong reputation as a food and drinks producing county and is home to well known brands such as Bulmer's, Cashel Blue Cheese, Glenpatrick Water, Tipperary Water etc. Tipperary Food Producers Network (TFPN), a group of artisan food producers, was established in 2008 with the objective of working collectively to grow and sustain their businesses. Products include beef, pork, cheese, preserves, confectionery/baked goods, chocolates and beverages. Combined turnover of TFPN is €22.5 million per annum and it currently employs circa 200 people. A core objective of the group is to realise the export potential of various food products, ideally under a Tipperary brand. *The Tipperary Food Sector Strategy 2010 – 2020'*, prepared by the Tipperary Food Producers, outlines a number of key strategic objectives and initiatives to generate greater economic activity for the Tipperary Food Producers and the wider food sector in the county for the period 2010 – 2020 which include:

- Develop "Tipperary" as an iconic food brand for export
- Maximise existing food and drinks production resources in the region
- Develop Tipperary as a green sustainable economy – linking with tourism, equine and food USPs
- Develop Food Centre of Excellence.

The food sector in Co. Tipperary is considered one of the county's strongest sectors. Realising its potential to be a significant contributor and beneficiary under *Food Wise 2025* is recommended under the LECP.

7.6 Energy Efficiency & Renewable Energy

Under an EU funded Concerto Programme, the Sustainable Energy for the Rural Village Environment (SERVE) Project energy efficiency and renewable energy measures were undertaken in Nenagh and surrounding areas. A District Heating System (DHS) and a solar park were developed in the Cloughjordan Eco-Village; another DHS was installed in Gurteen agricultural College together with a number of energy efficiency measures. In addition significant numbers of energy efficiency and renewable energy measures were installed in domestic, community and commercial buildings.
Tipperary County Council has been proactive in making its buildings energy efficient and the recent Photovoltaic (PV) Project will see a total of 193kW of PV installed on 9 Local Authority buildings across the county. This 93kW PV will produce 171,860kWh of electricity annually. This is equivalent to a reduction of 91,430 kg of carbon emissions from electricity.

In the Community & Social Inclusion element of the LECP, increasing energy efficiency measures and the use of renewable energy within communities is prioritized. Introducing energy efficiency and renewable energy in business operations can impact positively on cost savings and as result competiveness. The IDA and EI both have a number of programmes – such as the IDA run Environmental Aid Scheme and EI's Green Start and Green plus Programmes - which enable client companies to introduce energy measures which positively impact on company performance. It is recommended programmes such as these are promoted to businesses in the county and that programmes of this nature which would benefit the microenterprise sector developed and promoted with appropriate microenterprises.

7.7 Social Enterprise

Social Enterprises are businesses established to address social, economic or environmental issues through trading or commercial activities. Much debate centres on an accepted definition of social enterprise/ social economy. However, they may be defined as an enterprise that trades for a social and/or environmental objective; lies somewhere on a continuum between the public sector and the private sector; where at least part of its income is earned from its trading activity; and where the surplus is primarily re-invested in its main objective. The most common types of legal structures for social enterprises in Ireland are Company

Limited by Guarantee or a Community Co-operative registered under the Industrial Provident & Friendly Society.

In 2011, the European Commission launched the Social Business Initiative as part of the Single Market Act within which social enterprise is one of 12 priority areas. Social enterprise accounts for about 6% of GDP across the EU and the European Commission's 'Europe 2020' Strategy sets a target for this contribution to grow to 9% of GDP over the decade to 2020.

A Clann Credo study in 2011 estimated that the social enterprise sector in Ireland in 2009 employed between 25,000 and 33,000 people in over 1,400 social enterprises with a total income of €1.4 bn. Types of social enterprises in Ireland may incorporate one or more of the following:

- Those with commercial opportunities that are established to create a social return
- Those creating employment opportunities for marginalised groups
- Economic and community development organisations
- Those that deliver services (Forfás 2013).

The nature of social enterprises is that goods and services are provided locally and therefore jobs are created in local areas particularly to those most distant from the labour market. Sectors in which there is potential for social enterprises to operate include community retail; community care services; tourism and heritage products; leisure and sports services; and energy production (Fofás 2013).

A key concern raised at public consultations held in relation to the LECP was the lack and loss of services in rural areas and the impact of same on rural life for all cohorts of the community. The potential of social enterprise as a mechanism to address provision of such services in rural areas needs to be considered as part of an overall strategy to address rural decline. As part of this strategy, data on the extent of social enterprise activity in the county such as the number, type and supports required by social enterprises needs to be compiled. The LECP recognises the potential for social enterprises to address issues addressed in the Community element of the LECP. These include provision of employment opportunities to population cohorts experiencing difficulty entering the workforce. It was also recognised that the LEADER element of the RDP 2014 – 2020 and the Social & Community Activation Programme (SICAP) are two instruments under which support – both in terms of capital funding and capacity building – could be provided to the social enterprise sector.

7.8 SMART Specialisation

Smart Specialisation is a strategic approach based on the more effective spending of public resources, concentrated on certain domains of knowledge and expertise. Therefore regional or local economies can be further developed through new knowledge based activities selected through the area's existing capabilities, assets, competencies and competitive advantages which allow the area to focus on its strengths. This plan endorses this approach in terms of the development of small emerging FDI companies and also indigenous enterprises which would avoid over-reliance on any particular sector.

*e*DIGIREGION is a unique collaborative EU funded project ((funded by EU FP7) comprising of fifteen complimentary and experienced partner organisations from four diverse regions: - South East Ireland; Central Hungary; Bucharest-Ilfov, Bucharest; and Castilla-La-Mancha, Spain. The consortium partners are representative of the triple helix stakeholders in each of the four regions and include industry associations, research/academic organisations, policy-makers and research funders. The goal of the *e*DIGIREGION project is to enhance regional competitiveness by exploiting regional strengths and smart specialisations to realise the key objectives of the Digital Agenda for Europe. Co. Tipperary is represented on the *e*DIGIREGION consortium.

As part of the *e*DIGIREGION a benchmark audit was developed which will be used as a basis for developing a Joint Action Plan within the South East region and an International Joint Action Plan across the consortium regions. It identifies the region's strengths, weaknesses, opportunities, threats and smart specialisations. It outlines the current position of the region, how it measures against good practices identified and what needs to be done to improve its capacity to embed the RTD and innovation aspects of the Digital Agenda. The project has identified a number of specialisations for the South East Region as illustrated in the table below. The criteria applied in the selection process were as follows:

- Builds on resources already available
- Fits with and supports policy
- Addresses an identified growing market opportunity
- Willingness amongst triple helix stakeholders to collaborate
- Potential for scaling/internationalisation.

Potential SMART Specialisations in the South East Region	
Future Internet of Technologies	Renewable Energy
Advanced Manufacturing	Pharma, Bio-Tech, Life Sciences
ICT in Agriculture	Marine (Blue Tech)
Tourism	Digital Media
Logistics and Distribution	FINTECH (Tech in Financial Services)

Sectors considered having potential in Co. Tipperary which could be progressed over the life of the LECP are Agri-tech; Digital, Gaming & Multi-media sectors; Food; and Tourism. The LECP will focus appropriate actions in these areas.

7.8.1 Agri-tech Sector (Non Food)

Global changes, which include a rising population placing increasing demands on food production and the effects of climate change, together with consumer demands create particular challenges for the agricultural sector. This in turn requires the sector to respond to these demands in an innovative and timely fashion. Science and technology are critical in meeting these challenges. ICT in Agriculture, `agri-tech' includes the application of Future Internet technologies (Internet of Things, cloud computing, data analysis and social computing) and recent advances in sensor technologies to the agriculture value chain.

As previously outlined, Co. Tipperary has a strong agricultural base and has the potential to be a significant player in dairy expansion in the country following removal of the milk quota system earlier in 2015. Farmers, given the appropriate support, are keen to capitalise on their strengths and expertise in agriculture in order to create new industries, new research clusters and, ultimately, jobs. Co. Tipperary already has a presence in the agri-tech sector – this includes Abbey Machinery, Herdwatch, Dovea Genetics, Mullinahone Eurotags, and Liffey Mills – which could be further enhanced to create a speciality in the county. To date this is an area which has received little focus despite having a significant number of persons employed in this sector with the potential to develop operations of scale. There is now an opportunity to build on these capabilities to develop and grow the agri-tech sector in the county which would contribute to the development of an innovation culture and the numbers of HPSUs in operation in the county. However, further work is required in this area. It is envisaged that over the life of the LECP significant engagement between the agricultural and ICT industries and the public sector will take place to develop a strategy to grow the sector.

7.8.2 Digital, Gaming & Creative Multi-Media Sector

Limerick institute of Technology's (LIT) Clonmel Campus offers Creative Multi Media and Digital Animation Production Programmes. Creative Multi-media students at LIT LSAD Clonmel have been recognised both nationally and internationally in various competitions and awards. LIT's Thurles Campus Games Design & Development Programme is designed to produce graduates with an in-depth knowledge of the essential aspects of games design and development. LIT Thurles, a Digital Games Hub, is also the home of Games Fleadh, one of Ireland's important games programming festivals. LIT Thurles alumni have worked on AAA titles such as StarCraft, Wolfenstien, Guitar Hero and Call of Duty. Thurles Chamber Community Enterprise Centre, which is located on campus, facilitates and is host to game studios start-ups.

The convergence of the technology, media and games industries has created the need for this new type of graduate who possesses a unique blend of artistic and technological skills. Effectively, the LIT programmes provide a pool of potential talent for these industries. LIT Thurles and LIT Clonmel has the potential to develop small but important gaming/multi media enterprises. This nascent sector could be aligned with the animation software and games development courses in Carlow IT and a triangle of expertise could, in time, emerge which would be another significant attractor in the county and region. Targeted supports to assist students to further develop their areas of study ought to be considered and to encourage R&D and youth entrepreneurship in the creative sector. Business supports and the provision of incubation space to those students who wish to create gaming or multi-media start-ups and assistance to grow their business to scale needs to be addressed.

7.8.3 Food & Tourism

The potential of the food and tourism sectors in the county have already been outlined in Section 6.8.5.

ICT in tourism can be used to enhance visitor experience. Opportunities exist in the application of ICT technologies and promoting etourism by deploying technologies such as GPS location tracking, virtualization, hand-held/mobile devices, data analysis, game and guide Apps etc. to help market and promote the region.

The world's leading food producers are investing heavily in 'smart-agri' by supporting the use of advanced ICT at all stages in the food chain - on-farm through to processing and retailing. The application of ICT in agriculture has the potential to transform global food production.

7.9 Conclusion

The LECP is underpinned by an objective to achieve balanced sustainable economic development. The approach adopted therefore in the LECP is to ensure there is a mix of industry types and sectors operating in the county thereby mitigating risks attached to over-reliance on any one sector. Also the pursuit of economic development and opportunity for the county must be appropriate to the location and be in compliance with the County Development Plan and other relevant policies.

During the development of the LECP there was some concern expressed at the lack of supports for professional services. It was decided that this was not an issue for the LECP but would instead be considered by the Economic Development & Enterprise SPC during its term of office.

The focus of the LECP will be on the following identified priorities:

- Creating appropriate economic development opportunities throughout the county in order to address rural decline and regional imbalances. It was accepted that that not all sectors could operate in all areas. Scale of operation would also be another consideration in terms of appropriate development for an area.

- Addressing key economic infrastructural deficits in the county. Particular reference was made to the provision of high speed broadband, provision of water supply and reservoir in Clonmel, and enhancement of transportation links on a regional and county basis. Examples are the N24 national primary route, and routes linking Thurles and Limerick, and Thurles and Nenagh.

- Increasing the number of enterprise start-ups and grow the microenterprise sector to scale, as appropriate, and providing the necessary supports and environment to stimulate innovation and new product development.

- Supporting the development of emerging sectors or sectors with further potential such as tourism, food, multi-media and agri-tech while also working with vulnerable economic sectors to mitigate any negative impacts on the local economy. Sectors identified as being vulnerable included the retail and construction sectors.

- Supporting enterprises to improve energy efficiency, increase use of renewable energy, and growing the renewable energy sector

- Ensuring the workforce meets current and future employment skill requirements.

Realising the potential of the the county as a location for inward investment, both FDI and indigenous investment, was identified as a priority to be progressed under the LECP. It was agreed that in order to maximise this potential an anlaysis of the county in terms of its property solutions, workforce, and qualityof life would need to be conducted. Following on from this thsere would be a need for branding and marketing of the county as a location for investment.

In addition, the LECP process identified the need to compile economic data at local level in order to establish benchmarks and subsequently monitor and evaluate progress on the LECP Framework Priority targets and actions.

8. Economic Action Plan 2015 - 2020

8.1 Framework Priorities & Strategic Actions

VISION: To create economic opportunity in all parts of the county through the implementation of strategic actions to address issues affecting employment, unemployment, and enterprise development

KEY ECONOMIC PRIORITIES: As previously stated the Economic Plan for Co. Tipperary advocates an integrated approach to economic development in the county. The plan has a particular focus on the development of new enterprise, and sustaining and supporting the expansion of existing enterprises; the development of various sectors such as tourism, equine, food, multi-media and agri-tech; and the development of economic and tourism infrastructure. Framework Priorities and strategic actions are linked to the Regional Action Plan for Jobs for the Mid West and South East Regions. Strategic actions outlined on the following section support the following objectives of these RAPGs:

- Increase employment in the regions, particularly in export led sectors
- Increase the number of start-up enterprises
- Increase employment in the existing base of companies
- Attract more inward investment to the region
- Integrate skills provision with enterprise requirements
- Increase innovation and industry engagement activity of the region
- Strengthen important sectoral clusters
- Increase value of agri-food exports
- Grow overseas tourist numbers and revenue
- Build strong enterprise networks to grow the region.

Key economic framework priorities and strategic actions to be progressed over the life of the LECP for Co. Tipperary are as follows:

High Level Economic Priority 1	**To promote and enable appropriate economic development opportunities throughout the county**				
Current Benchmark	2011: Number of 20 – 64 year olds employed was 57,735				
6 Year Target	• Employment: 3.6 % increase on number of 20 - 64 year olds employed based on Census 2011 numbers (2078) • Increase in number of domestic and international tourism visitors – 10% by 2020[5] • Increase in Overseas Visitor Revenue[6] by 5% per annum, net of inflation				
Considerations	- Government policy on FDI - Requirements of Foreign Direct Investors - Plan policies on the location of development - Infrastructure investment by Government - Government support for nascent sectors				
Strategic Actions		**Local KPI**	**Coordinating /Lead[7]**	**Supporting Partners**	**Timeline**
E 1.1	Promote suitable property ready locations which have the ability to meet the needs of the FDI client – in particular, for the period of this LECP, focus on promoting property ready solutions in Clonmel, Nenagh and opportunity sites at Lisheen and Thurles as appropriate.	No. of itineraries No. of new FDI No. existing FDI expansions No. of Jobs created	**LA**	LIT, IDA, CTC	Q1 2016 onwards
E 1.2	Promote, support and develop specific locations as relevant for: - large scale indigenous investment - smaller-scale foreign direct investment through Connect Ireland initiative, particularly investments in the new emerging sectors with the most likely locations being Carrick-on-Suir, Clonmel, Cashel, Tipperary Town, Thurles, Nenagh, Roscrea , Templemore and Newport – Carrick-on-Suir to be prioritised	Review of potential of each location completed Action Plan developed & being implemented to address any deficits Promotional Plan	**LA (LEO)**	LIT, IDA, EI, Connect Ireland, CTC	Q1 2016 onwards

[5] Base Year 2013: 168,000 Overseas Visitors &155,000 Domestic Visitors

[6] Based on national target of 5% per annum to 2025, net of inflation

[7] Co-ordinating lead : This role is to bring key stakeholders together regarding the relevant action with a view to developing an implementation plan for the action and overseeing the implementation same

		developed and implementation ongoing No. of Itineraries No. of Jobs Created			
E 1.3	Promotion and support of: - smaller indigenous economic opportunities in all appropriate settlements in the county - of micro-enterprise opportunities in all parts of the county including rural areas	No. of new enterprises No. of business expansions No. of additional jobs created No. that availed of training/business development supports Attrition rate of businesses supported	**LA (LEO)**	EI, LIT, ETB, LDC, Teagasc, Fáilte Ireland, UL, CC, LBGs	Q1 2016 onwards
E 1.4	Develop appropriate initiatives to support the expansion/extend the influence of existing or potential clusters in Tipperary, based on Tipperary's inherent strengths and where relevant, take a lead regional role. In particular, focus on the area of life sciences, digital multi-media and food	Regional Lead taken No. of active clusters	**LA (LEO)**	IDA, EI, LIT, Teagasc	Q4 2015 onwards
E 1.5a	Promotion, support of agricultural and food economic opportunities in all parts of the county	No. of Promotions No. of Grants	**LA (LEO)**	LIT, ETB, LDC, Teagasc, CTC	Q4 2015 onwards
E 1.5b	Co-ordinate and support the development of the food sector in Co. Tipperary to include the: - implementation of the Tipperary Food Strategy 2020 and the development of a Tipperary Food Brand - development of relations with appropriate 3rd level sector to support the implementation of the Food Strategy - exploration of opportunities around the development of Food Centre of Excellence - set up structures and supports to assist food producers in co. Tipperary	Tipperary Food Strategy 2020 implemented. Food Brand developed and operational Formal Links established and support provided Feasibility of Food	**LA (LEO)**	LDC, Food Network, LIT, Teagasc	2015 onwards

	to access and grow their export market - work with the Food Network to assist producers to supply into local restaurants and retail outlets	Centre of Excellence undertaken No. of producers supported to export No. of producers supported to access retail/restaurant outlets			
E 1.5c	Development of specific supports and programmes to encourage innovation in the Agri-tech area and, in particular, to develop an Agri-tech strategy	Agri-tech Strategy developed and implementation ongoing	**LA (LEO)**	Teagasc, EI, LIT	Commence Q2 2016
E 1.5d	Build on the current nascent green sector/ network to deliver on the strong green enterprise potential in Tipperary	Green Enterprise Strategy developed and implementation ongoing	**LA (LEO)**	LDC,EI, LIT,TEA, Green Business Network	Commence Q3 2016
E 1.5e[8]	Work with the retail sector, a key economic sector, at all levels to provide support, training, and development opportunities to include: - the roll out and support Town Centre Initiative - the development of specific supports to assist the independent retailer in PRAs to be sustained and prosper - develop transformative civic infrastructural projects in each of the nine towns in TCI which will assist in increasing footfall into PRAs in Clonmel, Nenagh, Thurles, Roscrea, Cashel, Cahir, Tipperary, Carrick-on-Suir, and Templemore.	Towns Centre strategy relating to all levels of retail sector developed Implementation of Town Centre Initiative & outcomes achieved No. of retail businesses availing of LEO supports Vacancy rates in prime retail areas in towns Transformative projects identified in 50% of towns and process commenced	**LA (LEO; Planning; MDs)**	Town Fora, LDC's	Q3 2015 onwards

[8] Compliments Community & Social Inclusion Action 1.3c

E 1.6a	The development and implementation of a pro-active tourism marketing strategy focusing on the county's strengths and experiences	'Tourism Marketing, Experience and Destination Development Plan' for Co. Tipperary developed & outcomes achieved No. of new tourism products developed No. of tourism business expansions supported Number of themes developed/supported in the identified areas Increase in domestic visitor numbers	**LA (LEO)**	Fáilte Ireland, TTC, LDC	Q4 2015 onwards
E 1.6b	Identification, promotion and support of specific themes of tourism development which build on Tipperary's inherent strengths and which are linked to the identified needs of the domestic and international market <u>Themes to include</u>: food tourism, equine, water-based tourism along the River Suir and Lough Derg; outdoor activities around the Munster Vales and the heritage experience (Cashel, Cahir, Roscrea, Holycross, Fethard, Thurles (sport), and Lorrha, etc.)				
E 1.7	To support the development of a minimum of two internationally focussed tourism propositions within Tipperary in line with Ireland's Ancient East and/or The Lakelands market needs/segments as identified by Fáilte Ireland. Work to progress with key stakeholders developing these experiences around the Munster Vales and Lough Derg.	Increase in product development in the Lough Derg & Munster Vales Destinations Promotional Plans developed & implementation ongoing Increase in international visitor numbers	**LA (LEO, Planning)**	LA, TTC, Fáilte Ireland, LDMSG, Munster Vales Group, PPN, LDCs.	Q2 2015 onwards
High Level Economic Priority 2[9]	**To improve the sustainability of the County's energy use by supporting enterprises in energy efficiency reduction/improvements and by growing the renewable energy enterprise sector**				

[9] Linked to Community & Social Inclusion Priority 13

Current Benchmark	• Establish benchmark for Co. Tipperary					
6 Year Target	• Targets based on benchmark to contribute to following national targets: 1. Public Sector to reduce energy use by 33% by 2020 2. Greenhouse Gas Emissions 20% lower than 1990 emissions 3. 20% of energy from renewable technologies 4. 20% increase in energy efficiency savings					
Considerations	- Government Energy Policy - Grid Access & Infrastructural Development - Energy Prices - County Development Plans, Policies and Objectives - Renewable Energy Strategy (STCC)					
Strategic Actions[10]		**Local KPI**	**Coordinating /Lead**	**Supporting Partners**	**Timeline**	
E 2.1	Maximise competitiveness of businesses through best practice energy management by increasing awareness of supports available - provision of energy management training across all sectors e.g. manufacturing , tourism, retail, agriculture, etc. as appropriate	No. of businesses that participated on IDA, EI & LEO energy management programmes	**LA (LEO)**	EI, IDA, TEA, LDC,CTC	Q2 2016	
E 2.2	Piloting of energy programmes, sustainable transport programme etc	No. of energy programmes in operation	**LA (SPU)**	TEA, LIT, LDCs	Q1 2016	
E 2.3	Support and encourage public sector bodies to achieve current ISO Energy Standard Support research, education & training on sustainable energy technologies	No. of public sector bodies achieving standard Development and implementation of	**LA**	TEA	Q1 2016	

[10] Additional actions contained in the Community & Social Inclusion Plan

		Sustainable Energy Action Plan			
High Level Economic Priority 3[11]	**Identify, prioritise and address the infrastructural deficits in the County which are restricting the ability to deliver appropriate economic development opportunities in all parts of the county**				
Current Benchmark	- 2011: Number of 20 – 64 year olds employed was 57,735				
6 Year Target	- Employment: 3.6 % increase on number of 20 - 64 year olds employed based on Census 2011 numbers (2078)				
Considerations	- Government policy and programmes on broadband provision - Government funding support for appropriate infrastructural investment				
Strategic Actions		**Local KPI**	**Coordinating /Lead**	**Supporting Partners**	**Timeline**
E 3.1a	Review NBP Plan for provision of NGA in Co. Tipperary and address any shortcomings as appropriate e.g. in a particular FTTH/FTTB	Monitoring of National Broadband Plan implementation i.e. improvements in service provision	**LA (LEO)**	LDC, PPN	Q4 2015
E 3.1b	Progress provision of MANs in Thurles				
E 3.2	Concentrate infrastructural investment in those areas which have been identified as the principal priority sites for economic/tourism development and as identified in the County Development Plan	Provision of appropriate infrastructure in priority sites as required	**LA (Planning)**	LDC	Ongoing
E 3.3	Continue to prioritise the development of the: - N24 National Primary Road between Limerick and Waterford - Clonmel to Thurles to Nenagh Road - Shannon Crossing at Ballina/Killaloe - Thurles By-pass	Inclusion of N24 and Clonmel /Thurles /Nenagh Road in appropriate national, regional and local strategies and lobbying as appropriate. Provision of Shannon	**LA (Transport & Planning)**	EI, IDA	Ongoing

[11] Compliments Community & Social Inclusion Priority 1

		Crossing & Thurles By-pass			
E 3.4	Provision of water reservoir & water supply north of Clonmel	Delivery of Water Reservoir progressed	**LA (Water & Planning)**	EI, IDA	Ongoing
E 3.5	Retention of rail line service between Limerick & Waterford and review Nenagh Rail Network and its future use	Number of daily services retained	**LA (Transport)**	PPN	Ongoing
E 3.6	Use the planning system, where appropriate, to address deficiencies in mobile phone networks through strategic assessment.	Improved service	**LA (Planning)**	EI, IDA	Ongoing

High Level Economic Priority 4	**Identify and address the skills deficit in the County relevant to the needs of existing employers and future employment opportunities**
Current Benchmark	• 2011: Number of 20 – 64 year olds employed was 57,735
6 Year Target	• Employment: 3.6 % increase (2078) on number of 20 - 64 year olds employed based on Census 2011 numbers
Considerations	- Government programmes for training and education - Government programmes of support for up-skilling and for those returning to education and training

Strategic Actions		**Local KPI**	**Coordinating /Lead**	**Supporting Partners**	**Timeline**
E 4.1a	Establishment of a Training and Education Forum/Fora involving public providers, private providers and businesses to integrate the activities of providers, minimise unnecessary overlap and make this training and education more relevant to the needs of employers	Training needs of employers identified No. of Training programmes in which employers actively engaged in design etc. No. of participants on programmes No. of work experience/placements & no. Employment progressions from same No. of employees engaging in workforce development	**ETB**[12]	DSP, Intreo, LDC, LIT, WIT, EI LA(LEO), Teagasc, CTC	Q1 2016
E 4.1b	Involvement of businesses in the design of programmes and in the provision of placement and work-experience where required as part of a programme				
E 4.1c	Establishment of a collaborative, on-going programme promoting the importance of continuing education for the workforce particularly through the responsible state agencies				
E 4.1d	Investigation and implementation of means of making training and education more affordable and accessible to employers				

[12] Actions & timelines depend upon the transfer of the previous FÁS role to the ETB in a timely and resource appropriate manner

<table>
<tr><td></td><td></td><td>programmes</td><td></td><td></td><td></td></tr>
<tr><td>High Level Economic Priority 5</td><td colspan="5">A. To proactively assist in enabling an increase in new enterprise start ups throughout the county
B. To address the support deficiencies of existing enterprises who are entering their 3 – 5 year life cycle
C. Provide a robust and proactive platform to support and enable a greater level of innovation and new product development within industry
D. To actively work with key sectors and business to deliver a higher level of High Potential Start Up Firms (HSPUs) within the County</td></tr>
<tr><td>Current Benchmark</td><td colspan="5">• 2011 base year:
- Number of 20 – 64 year olds employed was 57,735
- 25 start-ups & 17 business expansions on average for period 2011 - 2013
- New benchmark to be set for firms in 3- 5 year development phase and % sustained
- 3 HPSUs in 2014</td></tr>
<tr><td>6 Year Target</td><td colspan="5">• Employment: 3.6 % increase (2078) on number of 20 - 64 year olds employed based on Census 2011 numbers
• 150 new microenterprise start-ups by 2020 (LEO) i.e.25 per annum based on benchmark
• 102 business expansions by 2020 (LEO) i.e. 17 per annum
• 50 new start-ups by 2020 (RDP)
• New benchmark to be set for firms in 3- 5 year development phase and percentage sustained
• 18 – 20 HSPUs by 2020</td></tr>
<tr><td>Considerations</td><td colspan="5">- Nature of Government support for such initiatives in terms of scale and longevity
- Characteristics of enterprises in Tipperary
- Availability of schemes to promote exports
- Willingness of firms to use available schemes and to consider becoming exporting companies
- Willingness of employers to provide employment for those in such circumstances</td></tr>
<tr><td colspan="2">Strategic Actions</td><td>Local KPI</td><td>Coordinating /Lead</td><td>Supporting Partners</td><td>Timeline</td></tr>
<tr><td>E 5.1</td><td>Increase the number of start-ups in the county and provide the appropriate supports to start-ups and companies in 3-5 year stage of operation</td><td>Entrepreneurship and Innovation Strategy developed & being implemented
Increase in no. of start-up companies
Increase in number of companies scaled to operate in national and export markets</td><td>LA (LEO)</td><td>EI, CTC, LA Planning</td><td>Ongoing</td></tr>
</table>

E 5.2	Organisation of co-ordinated promotional events, such as Enterprise Awards and 'Who to Talk To', throughout the county	No. of Events & Participants	**LA (LEO)**	Enterprise Agencies, CTC & Third Level Colleges	Q2 2015 & ongoing
E 5.3	Develop an Entrepreneurship & Innovation Action Plan which will focus on: - developing and implementing programmes for the promotion of existing innovation supports (including innovation partnerships; innovation vouchers; Horizon 2020, EI Equity Investment Scheme etc. - develop greater connectivity between 3rd level supports and businesses - develop and implement innovative training schemes for entrepreneurs with potential - support enhanced management training schemes	Entrepreneurship & Innovation Action Plan developed and being implemented No. of Innovation Vouchers No. of Innovation Partnerships Engagement in schemes	**EI**	LA (LEO), IDA, LDC, LIT, WIT, CTC	Commence Q4 2015
E 5.4	Develop a County Digital SME Strategy to increase the level of technology usage to drive business growth (social media; web sales; app development etc.) and explore: - promoting ICT adoption, innovation and investment in sectoral R&D to drive transformational change in key enterprises in the county - seek ways to introduce businesses to new technologies and processes - support the early stage of ICT business by establishing mentoring and support programmes involving more established initiatives	Strategy developed and being implemented Metrics developed on level of ICT support provided & No. participating in ICT Schemes (e.g. Trading Online Vouchers), Training & Mentoring	**LA (LEO)**	EI, LDC, ETB, LIT, CTC	2015 onwards
E 5.5	Assess the possibilities and potential around the creative sectors to create new and develop existing enterprises	Opportunities identified Plan developed & being implemented No. of businesses in the sector supported	**LA (LEO & Arts)**	LDC, LIT, ETB Design & Crafts Council of Ireland, Arts Council	2016 onwards
E 5.6	Undertake an assessment of the indigenous businesses with 10 – 50 employees serving local and national markets to identify: - Key sectors	Survey completed and recommendations being implemented	**LA (LEO)**	Third Level College, EI	Commence Q2 2017

	- Location in the county - Supports accessed e.g. 3rd level colleges etc. - Developmental needs/supports required				
E 5.7a[13]	Establish support structures to develop and promote social enterprise (SE) models of business and develop a Social Enterprise Action Plan	No. of SE Development Programmes/ Mentoring etc. & outcomes evaluation No. of Social Enterprises operational & type of trading activity No. employed in SEs (from Live Register) Analysis of Revenue Generation Verification systems in place and operational	**LA (LEO)**	LIT, LDC, PPN	Commence Q4 2016
E 5.7b	Co-ordination of the activity of the bodies involved in this so that a clear progressive co-operative route from initial idea to start up and growth phases is provided to the business and maximum support is provided to assist the business to succeed (in the context of education, mentoring; grants etc. - case conference model)				
E 5.7c	Agreement of clear activity programmes with community and social enterprise organisations such as Communities Creating Jobs, Connect Ireland etc.				
E 5.7d	Monitor areas where there is weak take up of SE supports and prepare plan of action accordingly				
E 5.8a	Review of availability of physical facilities to accommodate new businesses and prioritisation of provision in areas where there is a significant lack of space	Workspace Study completed Service Support Plan being implemented 100% occupancy in enterprise centres No. of supports provided	**LA (LEO)**	Enterprise Agencies	Q4 2015
E 5.8b	Develop an enterprise service support plan for enterprise centres across the county			Enterprise Agencies, CECs	Commence Q2 2016
E 5.9	Identify, target and monitor private investment opportunities in respect of developing enterprises in Tipperary	Funds sourced	**LA**	EI, LIT, CTC,	Commence 2016 & ongoing
High Level Economic Priority 6[14]	**To maximise the attractiveness of Tipperary as a place to invest by identifying the key attractors to investors, prioritising same and implementing on a prioritised basis**				

[13] Economic Action 5.7a – 5.7d linked to Community & Social Inclusion Action 4.1f; 5.1g; and 8.2b.

Current Benchmark	• Benchmark process for the two strongest performing towns in the county by 2020 to be developed • 2011: Number of 20 – 64 year olds employed was 57,735				
6 Year Target	• Establish benchmark process for the two strongest performing towns in the county by 2020 • Employment: 3.6 % increase (2078) on number of 20 - 64 year olds employed based on Census 2011 numbers				
Considerations	- Availability of resources to address issues identified as being negative				
Strategic Actions		**Local KPI**	**Coordinating /Lead**	**Supporting Partners**	**Timeline**
E 6.1a	Analysis of the county as a whole as an attractive place to invest in terms of workforce, transport, available premises, energy costs and general quality of life	Analysis completed Key towns identified & programme of prioritised actions being implemented	**LA (LEO & Planning)**	IDA, EI, LIT, CTC	Commence Q2 2016
E 6.1b	Analysis of smaller settlements in the county as attractive places in terms of workforce, transport, available premises/accommodation, and general quality of life/wellbeing – in particular: - develop programme of actions to address the identified weaknesses in the smaller settlements and support small scale public realm and community projects linked to improving access to a better quality of life and wellbeing	No. of smaller settlements that have developed integrated improvement plans	**LDC**	IDA, EI, LIT, ETB, LA (Planning & MD), PPN,LBGs /CC	Commence process Q3 2016 on a prioritised basis

High Level Economic Priority 7	**Actively market Tipperary as a place to establish a successful enterprise**
Current Benchmark	• System for tracking new investment to be introduced. • 2011: Number of 20 – 64 year olds employed was 57,735
6 Year Target	• System in place to track new inward investments • Employment: 3.6 % increase (2078) on number of 20 - 64 year olds employed based on Census 2011 numbers
Considerations	- Government policies regarding investment priorities - Perception of investors - Identifying potential investors - Resources to market the county

[14] Compliments Community & Social Inclusion Priority 1

Strategic Actions		Local KPI	Coordinating /Lead	Supporting Partners	Timeline
E 7.1a	Development of a marketing strategy & brand for the county as a location for investment	Suite of Marketing Tools and new Brand developed Marketing Strategy & Action Plan developed and being implemented Appropriate forum established to assist with marketing No. of investment EOIs No. of investments secured No. of investments operational No. of Connect Ireland/Diaspora investments	**LA (LEO)**	Marketing Group (incl. of IDA & EI) to be established	Commence 2016
E 7.1b	Development and implementation of a marketing action plan for investment for the county				
E 7.1c	Establishment of an inter-organisation marketing group to implement the strategic decisions referred to above. Connectivity and opportunities offered through the Diaspora links to be further explored.				

High Level Economic Priority 8	**Identify the most vulnerable economic sectors & areas within the county and identify ways of mitigating the impact**
Current Benchmark	• Benchmark to be developed
6 Year Target	• Identify relevant factors and set appropriate targets • Employment: 3.6 % increase (2078) on number of 20 - 64 year olds employed based on Census 2011 numbers.
Considerations	- Funding constraints - Lack of recognition of the vulnerability of the sectors by the key stakeholders

Strategic Actions		Local KPI	Coordinating /Lead	Supporting Partners	Timeline
E 8.1	Undertake a risk assessment of key vulnerable areas and devise an appropriate action plan around same (Mining, Construction, Retail, Pharma etc.), including identifying potential diversification opportunities	Risk Assessments completed for vulnerable sectors Actions Plans being	**LA**	IDA, EI, ETB, LIT, DSP,LDC, CTC	Commence Q4 2015 & ongoing

E 8.2	Draw up a protocol which will assist in minimising the fall-out from businesses downsizing or closing and ensure maximum support is provided to the employees and the company	implemented and monitored e.g. Retail Support Programme including Town Centre Initiative. Protocol developed			Q2 2016

8.2 Implementation & Monitoring

The implementation period for the Economic Plan is from 2015 – 2020. Agencies and organisations with an economic development and/or enterprise support remit are responsible for implementing the various actions under each of the Framework Priorities outlined in 8.1. Agencies that have a 'LEAD/Co-ordinating' role have primary responsibility for ensuring actions are progressed and KPIs achieved. Those with a 'Supporting Partner' role have responsibility for delivery of specific aspects of particular strategic actions and achievement of relevant KPIs. All agencies and organisations involved must ensure that they prioritise the allocation of resources, whether financial, personnel or otherwise, to the particular actions assigned to them.

Monitoring of the Economic Plan for Co. Tipperary will be the responsibility of the Economic Development and Enterprise SPC within Tipperary County Council. It is envisaged that an annual update on progress with implementation of the Economic Plan will be provided to the SPC. The LECP Advisory Group, which comprises representatives from the Local Community Development Committee and the SPC, is charged with monitoring implementation of both aspects of the LECP – the Community Plan and the Economic Plan. The LECP Advisory Group will monitor progress of the LECP on a biannual basis. In addition, in each Regional Assembly area an 'Economic Strategy Forum'[15] will be established which will have a monitoring role for all LECPs in the area. It will also have the role of obtaining high level strategic input to inform the LECP processes and the Regional Spatial and Economic Strategy processes.

[15] It is recognised that in some instances a county or city based approach may be more appropriate.

Appendices

Appendix 1: Consultations

1.1 Feedback on Economic Issues – Public Consultation Workshops

It was recommended at the Local Economic & Community Plan (LECP) Workshops held in January and February 2015 that every goal in the LECP should have a timeframe and be measurable.

Issues highlighted at the LECP Consultation Workshops as priorities to be addressed in the LECP are as follows:

1. **Broadband**
    - Rural roll out of high speed connectivity is a priority. Significant parts of the county are without adequate broadband and mobile phone connectivity which impacts negatively on business development.

2. **County Brand**
    - Need to identify Unique Selling Point as a county – Quality of Life, Tourism or Food?
    - Greater potential for attracting investment now that the county has been merged administratively.
    - Geographically, now bordering new counties, potential for inter-county connections.
    - 'T' registration on cars – suggestion that 'TY' would be more distinctive.
    - Need to promote the new 'Brand Tipperary' from economic prospective.

3. **Agriculture & Agri Food**

- Harvest 2020-environmental concerns over potential for over-intensification and impact on the green image of the county, tourism etc.
- Promote use of locally produced food by public organisations in the county.
- Support for non-dairy farmers required e.g. market gardeners etc.

4. FDI

- Large FDI in only three locations is not acceptable. Thurles needs to be included in terms of Lisheen site where there needs to be a focus in terms of it being a strategic site in the county. Tipperary Town also needs to be included.
- Should be sustainable – provides high earnings and therefore high paying-extra spending power that benefits the local economy.
- Clonmel has a pharma base, so need to develop/attract synergy/supply chain industry.

5. Support for Microenterprise & SMEs

- Further development/promotion of incubator units for start-ups In Clonmel.
- Further promote and support artisan food development.
- Need for more flexibility/discretion e.g. sourcing land, tailored practical supports & workshops, handholding, assistance with bank applications, etc.
- Support for businesses to stay in business.
- Craft businesses need support to become commercially viable.
- Social Welfare period for start-ups needs to be extended to allow those on welfare adequate time to develop their business.
- Lack of support for import distribution.
- Public Procurement policy an issue for local businesses.
- Access to finance – need for low interest loans over a longer period of time.

7. Energy

- Energy: would need to meet our 2020, 2030 & 2050 standards.
- A large number of buildings that need to be retro fitted - work on this could lead to job creation.
- Passive house standard should be the only standard when reducing CO2 emissions.
- Cloughjordan model extended county-wide.
- Energy Policy - from 'Cloughjordan Eco Village' to 'Eco County'.
- Brussels/NY as inspiration.
- Farmers have lost out to large scale companies in terms of wind farm development. Need for policy to support involvement of local farmers to develop wind farms on their land. Also introduction of measures for farmers to use renewable technologies on their farms.
- Need for innovation approaches/mitigation measures to combat the effects of Food Harvest 2020.

8. Social Economy:

- Acknowledge Community/Voluntary sector contribution to economy e.g. Clonmel Community Resource Centre etc.

9. Youth Employment

- Need to retain graduates/educated workforce e.g. high skilled gradates from L.I.T. etc.
- "Youth Entrepreneurship'' needs to be a priority in the Framework Priority Document.

10. Connectivity

- Inter-town road network not very good. Upgrading of the Nenagh –Thurles Road required.
- Improve North/South road connectivity.
- Thurles has excellent connectivity in terms of rail service and proximity to the motorway.
- Need for truck stop in Cahir – Cahir is located at a more prominent crossroads than the one in Cashel.
- Train station in Cahir could be used more as a transit depot for heavy goods.
- Train timetables not always conducive to making meetings in cities.
- Moyglass - even a limited bus service badly needed.

11. Tourism:

- Greater collaboration required within the tourism sector.
- The interconnectivity of the Munster Peaks initiative has a lot to offer small towns & villages across Tipperary and adjoining counties.
- Potential for niche tourism to be developed e.g. develops the bee-keeping tradition of parts of Tipperary –'bee-Keeping' museum.
- Heritage product a major asset e.g. Rock of Cashel, Holycross abbey etc.
- More promotion of tourism products required e.g. Lough Derg, heritage product, Mitchelstown Caves, rural recreation products etc. Use various tools e.g. video, website.
- Further development of Farmer's markets – use the Social Economy model.
- Potential for increased sports tourism e.g. Triathlon in Clonmel etc.
- Visitor Centre – Magner's in Clonmel
- Potential for large scale Amusement Park in Clonmel
- Potential of Glen of Aherlow needs to be addressed - more information, promotion, etc.
- The provenance of locally produced food needs to be advertised more.
- Dour's Lane - proposals are very expensive.
- The Gathering mobilised people - need for more funding for local events.
- Tourism-co-ordination and flow of information needed.
- Target - double the tourism revenue.
- Support craft/food and activity trails.
- Realise potential of walled towns of Fethard, Nenagh & Thurles.
- Slieve Ardagh Ecclesiastical Trail a tourism resource – need for links with Kilkenny & Cashel.
- Insurance for events held on public spaces.

12. Arts & Culture

- Lack of 'night life' in Clonmel. Development of arts and entertainment.
- Local colleges could promote 'student nights'.
- 'Active art' outlets with a social aspect where people can meet and interact-workshops etc. there is a way this can feed into economic activity – needs to be identified.
- Getting the arts out to rural villages & towns e.g. dance workshops etc.
- More cultural festivals and need to include craft element.

- Support for creative sector to contribute to the cultural economy and personal/community wellbeing.
- Need to create opportunities for artists to work and flourish in the county.
- Need for business training for creative sector.
- Need for social welfare business incubation programme for artists.

13. Town Centres & Villages

- Rural decline a major issue – government policy adversely affecting rural areas e.g. crime, loss of and inadequate services.
- Town Centre Initiative to revitalise towns.
- Appropriate training for retailers – social media, online trading, & funding for Retail/Town Centre Groups to contract appropriate expertise to develop strategic plans.
- Parking charges a major issue for retailers – survey amongst retailers in Thurles after Christmas identified that parking was the biggest issue for retailers.
- More communication between chambers regarding models of good practice.
- Retail development needs to be protected.
- How to sell the value to people of supporting local shops.
- Existing services, post offices, banks should be prioritised for their intrinsic value to the community and economy.
- Rural Pubs in decline - low cost alcohol is taking business away from pubs etc.
- Balanced economic development across the county relies on protecting core services.
- Planning policy.
- Retail space should be pro-rata to town/hinterland population.
- Big multiples damage small independent retailers.
- TCC supporting Festivals, Christmas events - need to do more.
- TCC needs to be conscious of the rates that businesses provide.
- Review of the Commercial Incentive Scheme. Scheme to encourage occupancy in vacant lots. Displacement issue needs to be addressed & 'Rates Holiday' perception.
- Further investment from CC for events.
- Need to encourage new businesses to locate in the town centre.
- Reduction in rates.

SPECIFIC TOWN ISSUES:

Clonmel

- Need for high quality shops on the main street.
- Deficiency - no footbridge to Tesco, no chance of accessing town.

- Trail in the town linking points of interest.
- Effect of multiples on small business - local people asking people what they are doing about the pressure on farmers.
- Triathlon - focusing attention on Clonmel. More sport tourism in the locality.
- Clonmel Arms site
- Need to incentivise retail sector. County Council attaches a development charge to an extension of your business, charge for parking and rates could double.
- Free parking.
- Ice skating around Christmas would be an option.
- Lot of mistakes in previous county development plan too many out of town centre.
- New focus on the town centre.
- Connectivity with the showground's The Poppyfields.
- Re-development of Kickham Barracks.
- Greenway project linking Clonmel to Carrick-On-Suir.
- Meandering walk from presentation convent to Carrick-On-Suir.
- Christmas to bring shoppers, Christmas lights. Council don't pay for Christmas lights. Bigger chain stores don't contribute. €6,000 per year.
- Car park on Suir Island in Clonmel. Need a multi-storey Car park.

Tipperary Town

- Too much retail space that has gone into Tipp town in such a short period of time.
- Retail space should be pro-rata to town population.
- What hope do the small enterprises have? Oversupply of retail in Tipperary.

Cahir

- Why is it not on the tourist trail in the document?

Carrick-on-Suir

- Town Centre Enhancement required.
- High level of unemployment a major concern.
- Training for boat building.
- Needs to face the river and exploit its potential.
- Need to focus on keeping people in the town.
- Need for one key industry in the town.
- Need for focus on the Long Term Unemployed in the town.
- Small business development support required.
- Greenway from Clonmel to Carrick-on-Suir will be an asset.

- Council needs policy to give community groups access to public lands for amenity/community space.
- Develop Wicklow Garden site.
- Negative impact of turbines and pylons on the aesthetic of the town.
- IT site outside the town – should be progressed as a priority.
- Need to upgrade the existing Town Hall.

Cashel

- Retail sector badly affected.
- Potential of Rock of Cashel needs to be utilised.
- Need for night entertainment & festivals.
- Upgrading of playground required.
- Open up Larkspur Centre to the visitor.
- Hotel to accommodate bus tours.

CONCLUSION:

1. Issues 1-13 above included as Framework Priority issues in the draft LECP Framework Priority Document.
2. Under Item 9 – this was included in the draft but following consultations, it is now recommended that "Youth Entrepreneurship" should be specifically mentioned in the LECP.
3. In Item 10 – Framework Priority 3 highlights the need to accommodate and address infrastructural deficits. It is likely that the North/South Road connectivity will be considered as part of the second phase of the LECP Plan preparation.
4. Specific issues under Item 11 to be referred to Tipperary Tourism Company for consideration in the development of a tourism strategy for Co. Tipperary. The second phase of the LECP is likely to focus on tourism as a key contributor to economic development and the key strategic tourism issues will be covered in this context
5. Specific issues included in Item 12. to be referred to Arts Office for consideration in the Arts & Festivals Strategy. However, it is also likely that the services of Arts and Festivals will be used to deliver some of the key strategic actions to be developed under the framework priorities in Phase 2 of the plan process

1.2 Written Submissions Received on Economic Issues

Submission Number	Relating to	Received From
1	Tourism	*Submission by Pierce O' Loughlin, Editor of The Three Counties Newspaper. As result of public consultation in Feb 2015*
2	Employment opportunities	*Chris Purnell, Co-ordinator, South Eastern Regional Drug and Alcohol Task Force (SERDAFT) As result of public consultation in Feb 2015*
3	County Court Services	*Tipperary Solicitors Bar Association As result of public consultation in Feb 2015*
4	Marketing and Tourism	*Upperchurch/Drombane and District Development Council As result of public consultation in Feb 2015*
5	Economic	*North Tipperary Community and Voluntary Association As result of public consultation in Feb 2015*
6	Economic	*Kilcommon Community Council As result of public consultation in Feb 2015*
7	Range of Economic Issues	*Charles Stanley Smith As result of public consultation in Feb 2015*
8	Employment & innovation	*South Tipperary Community & Voluntary Forum As result of public consultation in Feb 2015*
9	Youth Employment & Entrepreneurship	*Tipperary Regional Youth Service As result of public consultation in Feb 2015*
10	Rural Communities	*Cllr Matt Ryan., Templederry -February 2015 As result of public consultation in Feb 2015*
11	Rural Transport/Roads	*Mary Ryan, Main Street Borrisoleigh- February 2015 As result of public consultation in Feb 2015*
12	Economic and social development	*The Tipperary Integration Forum August 2014 consultation period*
13	Tourism, natural resources, arts and heritage	*SuirCan August 2014 consultation period*
14	Unemployment	*Millennium Family Resource Centre August 2014 consultation period*
15	Economic and Sustainable Development	*The Knockanrawley Resource Centre (KRC) August 2014 consultation period*
16	Wind energy Zone	*Joe Condon. August 2014 consultation period*
17	Youth employment	*South Tipperary Connecting youth Group August 2014 consultation period*
18	Economic - youth related issues	*ComhairlenanOg August 2014 Consultation period*

19	Economic - Tourism	*Tony Musiol – Chairman, Carrick-on-Suir Tourism & Economic Development Committee (COSTEDC)* *As result of public consultation in Feb 2015*
20	Economic	*Mike Croome-Carroll - Suir Valley Environmental Group* *As result of public consultation in Feb 2015*
21	Economic,	*Peter Ward, Country Choice, Nenagh* *As result of public consultation in Feb 2015*
22	Economic Clogheen/Cahir	*Carmel McCormack, Suir Valley Environmental Group (SVEG)* *As result of public consultation in Feb 2015*
23	Economic,	*Cllr Seamus Hanafin, Tipperary County Council, Thurles MD* *As result of public consultation in Feb 2015*
24	Economic	*Maura Carey CAVA North Tipperary* *As result of public consultation in Feb 2015*
25	Economic	*Edward O'Sullivan, Kilfeacle, Co. Tipperary.* *As result of public consultation in Feb 2015*

<table>
<tr><td colspan="3">Summary of Written Economic Related Submissions Received & Response to Submissions</td></tr>
<tr><td colspan="3"></td></tr>
<tr><th>Sub No.</th><th>Relating To</th><th>Received From</th></tr>
<tr><td>1</td><td>Tourism</td><td>Submission by Pierce O' Loughlin, Editor of The Three Counties Newspaper
As result of public consultation in Feb 2015</td></tr>
<tr><td>Summary</td><td colspan="2">'Solving our problems in Carrick-on-Suir'

1. The Tudor Manor House in Carrick-on-Suir should be the main focus for tourism. A road should be built from the N24 behind St. Brigid's Hospital to link up to the Wicklow Garden Centre (a 2.4 acre site proposed for town centre development). This road would allow potential for the Wicklow Garden site to be developed into a tourist village including an anchor shop (e.g. Blarney Woollen Mills), local artist projects, food and added tourist features.

2. The provision of a bus park at this centre would allow in excess of 50,000 tourists to visit the Castle and town. The castle development should link up with other tourist routes (e.g. Kilkenny Castle, Rock of Cashel etc.)

3. The area at the back of the castle should be landscaped, with improved access and a fitness park developed to counteract anti-social behaviour that currently exists in this area.

<u>'Post It' note:</u>
Create up to 500 retail/tourism jobs in The Wicklow Gardens Site by building a road behind the castle.</td></tr>
<tr><td>Recommendation:
Employment, Unemployment and Enterprise</td><td colspan="2">This submission relates to tourism and is specific to Carrick on Suir. Tourism will be covered under the key framework Objective 1:-"<u>To enable appropriate economic development opportunities in all parts of the County</u>". Tourism is viewed as having an ability to make a real impact on economic development and will therefore be a key strategic action of the LECP. The LECP will focus on key county tourism priorities and the Tourism Strategy, yet to be developed, will include not only the LECP priorities but also other relevant appropriate tourism actions. Submission will also be referred to the planning section re County Development Plan and the Carrick Municipal District office</td></tr>
<tr><th>Sub No.</th><th>Relating To</th><th>Received From</th></tr>
<tr><td>2</td><td>Employment opportunities</td><td>Chris Purnell, Co-ordinator, South Eastern Regional Drug and Alcohol Task Force (SERDAFT)
As result of public consultation in Feb 2015</td></tr>
<tr><td>Summary</td><td colspan="2">Submission received highlighted many of the issues present in relation to Substance and alcohol misuse. The economic responses needed included:

1. More CE schemes and places are needed to facilitate those in recovery from substance misuse to enter or re-enter the workforce.
2. Better engagement with Local Employment services and Partnership supports for employment and training.</td></tr>
<tr><td>Recommendation:
Poverty, Disadvantage & Social Exclusion</td><td colspan="2">Issues raised in this submission are relevant to many aspects of the Poverty, Disadvantage and Social Inclusion key strategic objectives. There is also a dedicated key strategic framework priority 9 - . <u>Develop an integrated response to reducing the level of substance misuse /abuse</u>.
The Mid West Regional Drugs and Alcohol Forum & The South Eastern Regional Drug and Alcohol Task Force (SERDAFT) will be noted as key stakeholders for the delivery of the strategic priority re reducing the level of substance misuse/abuse.</td></tr>
</table>

Sub No.	Relating To	Received From
3	County Court Services	Tipperary Solicitors Bar Association *As result of public consultation in Feb 2015*
Summary	The above Association submitted a review of the delivery of court services in County Tipperary. The economic aspects include: • The road network and public transport in Tipperary is weak, and as a result makes access to the courts for poorer socio-economic group difficult. • The closure of the courts will have a negative impact financially on these towns. • Maintaining court venues and courts services close to the communities they serve, is in line with government policy on rural development which identifies with the need for the role that the public sector can make to the sustainability of rural communities.	
Recommendation:	There is not a specific key framework Objective in relation to this submission in the LECP Framework document. However, issues it raises around rural accessibility; rural sustainability and rural isolation are identified as priorities. Decisions in relation to changes re Court service are a national issue and do not lie within the ambit of the LCDC to resolve. Some of the issues raised around the more marginalised groups, witnesses and support for victims can be referred to the Joint Policing Committee, The Children and Young Persons Services Committee, the Local Development Companies. The County Transport Co-ordination unit and organisations working with vulnerable children and families and the County Transport Co-ordination unit.	

Sub No.	Relating To	Received From
4	Marketing and Tourism	Upperchurch/Drombane and District Development Council *As result of public consultation in Feb 2015*
Summary	The above group submitted a 5 year plan proposal for their area. The plan focused on the following requirements: • Marketing; A marketing officer is required to develop markets for existing and potential tourism products namely; Upper Limits Indoor Climbing Wall, hill walking, cycling, genealogy and tours. • Accommodation – need to develop a hostel • Signage – more bi-lingual information signs for rivers, bridges, towns land boundaries and historical information. The submission acknowledged the support of various agencies including the County Council.	
Recommendation *Sustainable communities*	The Sustainable Communities Framework Priority of the LECP Framework document focuses on access to services in rural communities, rural isolation and development of sustainable communities. The LECP Priorities document has included a key framework Objective: 2: <u>To support development of sustainable communities and support the community and voluntary sector to respond to the needs in their community.</u> This works with and actively supports communities to maximise their potential in terms of delivering for themselves and also acting as a service channel for state services where this is appropriate. Having Sustainable communities as a framework priority will mean that other programmes linked to the LECP plan such as the Local Development Strategies will have to take cognisance of the LECP plan priorities.	

Sub No.	Relating To	Received From
5	Economic	North Tipperary Community and Voluntary Association *As result of public consultation in Feb 2015*
Summary	The submission identified 3 key economic priorities: 1). Broadband and issues related to rural communities 2). Local food, tourism and community energy projects – and the need for a policy in relation to 'green public procurement' 3). Waste management - suggest that cost of waste disposal should be borne by the producer of the waste.	
Recommendation: *Employment, Unemployment & Enterprise*	Key framework Objective 3 of the LECP is to '<u>identify and address the infrastructural deficit</u>'. Poor broadband coverage will be addressed under this Objective as a key strategic action. Several strategic actions under the Sustainable Communities Framework priority will be relevant to the 2nd point above. The LECP recognises the value that renewable alternatives can bring to the county and provision will be made to maximise this where it is possible, relevant and sustainable. Public procurement is a national responsibility and the LECP is seeking to only include those objectives that it can realistically deliver on or have an influence upon. . In relation to point 3 above this is a matter for the relevant waste management plan(s) at national, regional and local level and the LECP does not a role in relation to this at present. However, the issue will be brought to the attention of the SPC for Environment for their attention	

Sub No.	Relating To	Received From
6	Economic	Kilcommon Community Council *As result of public consultation in Feb 2015*
Summary	The submission consists of Kilcommon Village Plan (April 2011). The purpose of the plan is to prepare a long term strategy for the village, fully informed by and with the support of the local community Key economic priorities as outlined in the plan: 1. Development of a network of sustainable villages is highly desirable to ensure economic and social cohesion. 2. Broadband infrastructure is vital to the development of tourism, food, and digital sectors. 3. Re-use of buildings within the village 4. Improvements to community infrastructure to upgrade sewage, renewable energy, 5. Tourism and commercial potentials	
Recommendation: *Sustainable Communities*	The Sustainable Communities Objective 2 of the LECP Framework document; <u>To support development of sustainable communities and support the community and voluntary sector to respond to the needs in their community</u> focuses on access to services in rural communities, rural isolation and development of sustainable communities. The LECP Priorities document has included a framework Objective which seeks to work with and actively support communities to maximise their potential in terms of delivering for themselves and also acting as a service channel for state services where this is appropriate. Having Sustainable communities as a framework priority will	

<table>
<tr><td></td><td colspan="2">ensure that other programmes linked to the LECP plan such as the Local Development Strategy etc.will have to take cognisance of the LECP plan priorities.</td></tr>
<tr><td>Sub No.</td><td>Relating To</td><td>Received From</td></tr>
<tr><td>7</td><td>Range of Economic Issues</td><td>Charles Stanley Smith
As result of public consultation in Feb 2015</td></tr>
<tr><td>Summary</td><td colspan="2">The following is a summary of the Economic aspects to the submission

• Creation of economic opportunities
    • Build on the re-emerging Co-op movement (already strong in Tipperary) –
    • Circular Economy/Clean Technology
    • Promote circular economy/clean tech
    • Explore Agricultural Machinery and Software Applications
• Development of sustainable public/rural transport
• Undertake a study on all broadband options for the county
• Provide business mentoring support for new and emerging enterprises
• Marketing of Tipperary as a place to establish a successful enterprise should be linked in with the tourism promotion end of Tipperary being a good place to live, work and visit.</td></tr>
<tr><td>Recommendation:
Employment, Unemployment and Enterprise</td><td colspan="2">One of the key purposes of developing an integrated LECP is to ensure non duplication and to also acknowledge that an action assigned to an economic area will and can have a community impact and vice versa. It will be important that the Plan ensures there is clarity as to who is responsible for what, irrespective of whether it sits in the economic or community section. The economic issues (social enterprise/co-operatives; clean tech; Agri-tech) are all likely to be included as strategic actions within the framework Objective 1: <u>To enable appropriate economic opportunities in all parts of the County</u>. Transport, broadband and tourism are also likely to be included as strategic actions and will be further worked up during phase 2 of the Plan. The community elements of well being, and fuel poverty are also addressed in the Plan and will be further developed in Phase 2.</td></tr>
<tr><td>Sub No.</td><td>Relating To</td><td>Received From</td></tr>
<tr><td>8</td><td>Economic - employment and innovation</td><td>South Tipperary Community & Voluntary Forum
As result of public consultation in Feb 2015</td></tr>
<tr><td>Summary</td><td colspan="2">The Submission covered the following economic specific points:

• The need for training and capacity building for groups to enable them to reach their potential in the economic area
• The need to recognise the proven track record of the community and voluntary sector in innovation and creativity, including the development of projects that create economic activity and jobs.</td></tr>
<tr><td>Recommendation
Poverty, Disadvantage &Social Exclusion</td><td colspan="2">The submission outlines a number of suggestions re the Economic, Social and Community aspects of the LECP. Generally all the suggestions are covered in the Framework strategic document. However some of the specific point raised may be considered as an action in the next phase of the LECP plan and will be worked up at that stage.

The framework Objective in relation to children and young people has been</td></tr>
</table>

	amended to include families: 6. Integrated response to the needs of vulnerable families, children and young people. The issue in relation to gender based violence including rape, sexual assault and domestic violence is likely to be covered under key strategic objectives related to vulnerable families. Arising from the consultations and the evidence, a new framework Objective will be added around supporting people who find it difficult to sustain a home.	
Sub No.	**Relating To**	**Received From**
9	Youth Employment and Entrepreneurship	Tipperary Regional Youth Service *As result of public consultation in Feb 2015*
Summary	The following is a summary of the key suggestions in the submission relating to the economic aspects 1. Support for young people under 25 years old who are unemployed, 2. Support roll-out of the Work Winner Programme and the 2020 Activation Programme. 3. Prioritised support for young people under 21 who have little or no work experience and who are furthest from the labour market 4. Supporting local businesses and organisations to employ or to provide work experience to young people who are unemployed – 5. Support for young people to engage in informal employment and enterprise learning opportunities utilising a youth work methodology 6. Engaging with young people to support them to undertake learning and training activities in an international setting 7. Youth Entrepreneurship - development of an enterprise unit specifically focused on young people (under 25) developing their own enterprises.	
Recommendation *Poverty, Disadvantage & Social Exclusion*	Youth unemployment is included in the LECP framework - Objective 3: Address the high level of youth unemployment. It is suggested that an additional framework Objective be included which is focused on youth engagement: Objective 4: To maximise potential of life opportunities for young people and maximise their contribution to the sustainable development of the county. Other specific actions suggested may be included at the next stage of the LECP plan when specific strategic actions are being developed/worked up. It is also recommended that framework Objective11, on mental health be broadened to include 'Integrated response to health and wellbeing in the community'.	
Sub No.	**Relating To**	**Received From**
10	Rural Communities	Matt Ryan., Templederry - February 2015
Summary	The following is a summary of the key suggestions in the submission relating to rural economic aspects • Since farm payments became such a huge part of farm income the money has continued to follow the money heading South East, the excluded have been forgotten. The S/E has the richest households, that includes South Tipperary (see CSO) followed by Clare & Limerick all well ahead of North Tipperary. Need for more equitable realignment of payments. • Broadband needs; Fibre optic cable options must extend right into the hills of Mid/West Tipperary including the following not currently listed;	

	Gortagarry, Templederry, Killoscully, Silvermines, Upperchurch, Killea and Milestone with the necessary technology included to extend the service to those living beyond the 2-3 mile capacity of copper wire thereby giving service to all. • Saving the rural economy, has to feature as one of either a long or short list of priorities in M/W Tipperary - The Greater SlieveFelim extends to up 40,000ha at least, an area of huge biodiversity. It has been ravished by over forestation, under resourced with farm payments on low productive land and Constrained by the Restrictive Practices of the both the HABITATS & BIRDS DIRECTIVES - Lough Derg extends to 32,000ha as a comparison	
Recommendation: *Employment, Unemployment and Enterprise*	A number of the issues raised above are accommodated and noted as Framework Objectives such as broadband deficiency and rural isolation. Phase 2 will work these Objective areas up further and will refine and prioritise the areas that the LECP will focus upon. The remainder of the items referenced above will be forwarded to the relevant authority considering the development of the LDS	
Sub No.	**Relating To**	**Received From**
11	Rural Transport/Roads	Mary Ryan, Main Street Borrisoleigh-February 2015
Summary	The following is a summary of the key suggestions in the submission relating to the economic aspects A public rural transport system is more important going forward than it ever has been. With an aging population and a minimum rural transport service in place at the moment/ Older people need a transport service to maintain independence. For young people moving back from cities the lack of good transport is a real challenge. Early morning buses or train should be available to all the Tipperary Towns. Public bus transport into Clonmel from surrounding towns and villages should be timetabled to enable commuters to make use of it in line with the working day The services need to be able to being people to work and college for a 9.00am start. The roads are also in very poor condition and cambering and elevation of the roads above the water-table is needed to enable the rain water to run off into the ditches on either side.	
Recommendation: *Sustaining Communities*	Rural Transport came up repeatedly throughout the consultations process and a strategic action relating specifically to this is likely to be included under the Sustainable Community Framework Objective 1 - Maintain access to services in rural communities. The remainder of the issues relating to transport and road condition will be referred to the Transport Coordinator Unit and SPC for Transportation	
Sub No.	**Relating To**	**Received From**
12	Non Irish Nationals – Economic and social development	The Tipperary Integration Forum August 2014 consultation period
Summary	The following is a summary of the key suggestions in the submission relating to the economic aspects; The Tipperary Integration Forum aims to assist new communities to become part of everyday life in Tipperary. The following is a summary of the key suggestions in the submission relating to the economic aspects **Economic Development:** Economic development in the future will be driven by	

	the services and tourism sector. The 'Tipperary' brand should be further developed to encourage foreign visitors. New entrepreneurs should be supported. **Quality of Life:** Socially beneficial activities should be supported and promoted including social entrepreneurship and corporate social responsibility. **Comments/suggestions:** The Forum is well placed to work with and contribute to the LCDC. The contribution would be economic, cultural, social, spiritual and physical.	
Recommendation *Poverty, Disadvantage & Social Exclusion* *Employment, Unemployment & Enterprise*	The main Objective relating to Non Irish Nationals is in the Poverty, Disadvantage and Social Exclusion section of the LECP framework document where a number of the issues raised covered by Framework Objective 5. <u>Reduce the marginalisation of specific communities</u> - non Irish Nationals will be considered under this aspect. The ideas/suggestion in this submission relating to quality of life is covered by key Objective 11: Integrated response to reducing the level of substance misuse/abuse. The priority of Employment, Unemployment and Enterprise has identified Objective 9: <u>Marketing of Tipperary as a place to establish a Successful enterprise</u> and this addresses the Economic suggestions in the submission.	
Sub No.	**Relating To**	**Received From**
13	Tourism, natural resources, arts and heritage	SuirCan August 2014 consultation period
Summary	**SuirCan** is a community forum established to engage with the town's public spaces in a vibrant, creative manner which balances the needs of the community. The following is a summary of the key suggestions in the submission relating to the economic aspects **a) Tourism** Tipperary and Clonmel in general should focus on the mid and lower end of the market tourist who is looking for activity-based holidays and interesting places to explore. With appropriate infrastructure and investment in tourism, the town and its surrounding will benefit economically and encourage groups and communities to actively engage in the development and implementation of the plan. The submission lists existing natural and manmade resources and suggests how these projects could be developed individually into tourist attractions by both businesses and local groups. • The mountains - Comeraghs, Galtees, Knockmeldown and Slievenamon – hill walking, trekking • The River Suir and its tributaries – fishing and boating • Farming and food including apples and cider. – promote the culture of local food • The horse industry – organised tours in stud farms • Greyhounds • Cycling – cycle trails • Sports, particularly hurling – rallying, hunting and hurling ('have a go' concept for tourists) • History and archaeology – suggested 'Normand' trail, access to Main Guard? • Hotels, restaurants and pubs • The people - hospitality • Location – how to make visitors stop and spend in Clonmel	

	b) Arts and Heritage. The arts activities in the Clonmel area should be supported. History and Archaeology noted above **c) Integrated Approach.** An Integrated approach will add value. Visitors should be directed from one activity to another, which would require an overall strategy to be supplied by a 'Tipperary Tourism organisation'. Hostels and campsites should be developed. Bike hire, bus transport, refreshment stops and guided tours should be investigated as possibilities along the proposed greenway cycle route. Linking other towns and their attractions could add value to the tourist experience. Representatives of each sector and each community should be recruited to explore the possibilities in their area but the overall framework and implementation including marketing must be done at a county level.
Recommendation *Employment, Unemployment & Enterprise*	This submission relates to tourism and is specific to Clonmel. Tourism will be covered under the key framework Objective 1:- "<u>To enable appropriate economic development opportunities in all parts of the County</u>". Tourism is viewed as having an ability to make a real impact on economic development and will therefore be a key strategic action of the LECP. The LECP will focus on key county tourism priorities and the Tourism Strategy, yet to be developed, will include not only the LECP priorities but also other relevant appropriate tourism actions. Submission will also be referred to the planning section re County Development Plan and the Clonmel Municipal District office, the Arts and Heritage Plan and the Tourism Company

Sub No.	Relating To	Received From
14	Local area development - Unemployment	Millennium Family Resource Centre

Summary	**Millennium Family Resource Centre** is a rural based community development project in Slievedaragh/Glengoole, Thurles. The key areas of concern outlined in the submission are as a result of a Needs Analysis carried out in the community. **Unemployment** Lack of accessible educational opportunities locally and an affordable/consistent public or rural transport service are barriers to the up-skilling of unemployed people in the area. An increase in local training initiatives that have a clear progression route to mainstream training and educational opportunities in viable employment sectors are vital to attract and retain participants. **Adult Training / Education** Age restriction for local training initiative participants is a concern and people felt this was discriminatory. While the ETB provides opportunities for training in certain sectors the more mainstream opportunities are located in the larger urban centres and access to these due to transport costs can be a barrier to participation. **Public Transport** The rural transport service in the area is limited (including access to courses) and the cost of alternative transport options can be prohibitive. Millennium Family Resource Centre proposes the expansion of the service in order to facilitate older adults, unemployed and those without their own transport. **Affordable Childcare**

<table>
<tr><td></td><td colspan="2">Quality affordable childcare is essential for rural dwellers in terms of participation in training opportunities locally and in terms of the uptake of employment opportunities, particularly for women.</td></tr>
<tr><td>Recommendation
Sustaining Communities

Poverty, Disadvantage and Social Exclusion</td><td colspan="2">Several strategic Objectives under the Sustainable Communities Framework priority will be relevant to the points above. Objective 1: <u>Maintain access to services in rural communities as appropriate to their position in the settlement hierarchy</u>. Objective 2: <u>To support development of sustainable communities and support the community and voluntary sector to respond to the needs in their community</u>.

Objective 12 of the Poverty, Disadvantage and Social Exclusion Priority addresses the need to <u>Provide opportunities for the citizen to access life-long educational opportunities with particular supports for communities and individuals who are marginalised.</u>

The issue of affordable Childcare will be brought to the attention of the Child Care Committees in the County.</td></tr>
<tr><td>Sub No.</td><td>Relating To</td><td>Received From</td></tr>
<tr><td>15</td><td>Economic Development and Sustainable Development</td><td>The Knockanrawley Resource Centre (KRC)
August 2014 consultation period</td></tr>
<tr><td>Summary</td><td colspan="2">The Knockanrawley Resource Centre (KRC) is a community development project, based in Tipperary Town and the surrounding areas. KRC works with agencies and organisations in order to improve the quality of life of its population through the development of communities and capacity building to ensure a bottom up approach to decision making. The following is a summary of the key suggestions in the submission relating to the economic aspects

In order to allow unemployed and/or disadvantaged people to enter the local economy, the personal development of the individual needs to be enhanced through confidence building and job interviewing skills.
Sustainability and the environment:
Sustainable and environmentally friendly projects such as gardening and allotments which improve both physical and mental health can also encourage environmental awareness and should be supported.
Comments/suggestions:

Although there are many opportunities available in Tipperary, due to financial constraints, these programmes can be restricted in terms of length and geographical area. KRC will expand on this submission in further consultations.</td></tr>
<tr><td>Recommendation
Poverty, Disadvantage and Social Exclusion

Sustaining Communities</td><td colspan="2">A number of the Issues noted in the submission will be covered by Objective 12 of the Poverty, Disadvantage and Social Exclusion Priority which addresses the need to <u>Provide opportunities for the citizen to access life-long educational opportunities with particular supports for communities and individuals who are marginalised.</u>

Several strategic Objectives under the Sustainable Communities Framework priority will be relevant to the points above. Objective 1: <u>Maintain access to services in rural communities as appropriate to their position in the settlement hierarchy</u>. Objective 2: <u>To support development of sustainable communities and support the community and voluntary sector to respond to the needs in their community</u>. Suggestions will be considered in the next phase of the LECP which will focus on actions.</td></tr>
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Sub No.	Relating To	Received From
16	Wind energy zoning	Joe Condon. August 2014 consultation period
Summary	My suggestion for economic plan is the rezoning of land in the upcoming amendments to County Development Plan, for a wind energy project. [Community based]. The lands are in the town's lands of Clashganny west, Middle quarter and Kilnacarriga Newcastle Clonmel Co Tipperary.	
Recommendation	The improvement of the sustainability of the County's energy use is addressed in the Employment, Unemployment and Enterprise section of the Framework. The LECP has to be consistent with the core strategy of the CDP. Should the areas referred to be accommodated in the CDP for wind energy purpose; relevant wind energy actions can be progressed under the renewable energy objective of the LECPR. This submission will be referred onto planning section re County Development Plan	
Sub No.	**Relating To**	**Received From**
17	Youth employment	South Tipperary Connecting youth Group August 2014 consultation period
Summary	The Connecting youth Group recommend supporting young people in Tipperary. The following is a summary of the key suggestions in the submission relating to the economic aspects 1. Youth Employment programmes, for example, the 'Work Winner' programme in Tipperary. (A full time programme supporting young people under the age of 25 to develop their employability through training and work experience.) 2. Support projects like establishment of innovative learning groups such as Coder dojo Groups re rural youth. 3. Social economy type projects focused on young people and engagement, for example social farming, fishing hubs, outdoor pursuit's activities. 4. Consideration to be given to supporting transport provision in rural counties so young people can engage including creation of strong linkages between youth programmes and the rural transport services so that young people can access the resources, services and facilities available in their local area.	
Recommendation *Poverty, Disadvantage and Social Exclusion.*	Youth unemployment is included in the LECP framework - Objective 3: Address the high level of youth unemployment. It is suggested that an additional framework Objective be included which is focused on youth engagement: Objective 4: To maximise potential of life opportunities for young people and maximise their contribution to the sustainable development of the county.	
Sub No.	**Relating To**	**Received From**
18	Economic youth related issues	Comhairle Na nOg August 2014 Consultation period
Summary	The following is a summary of the key suggestions in the submission relating to the economic aspects: • Transport and rural isolation - Re-establish routes for public transport • Slow internet, bad phone network • No franchise shops, poor choice of shops • Lack of employment for youth – more FAS involvement	

	• Discrimination in a workplace: - unfair hours (e.g. Part time workers working 5 days) – pay off €5 an hour – education of working rights • No language courses/classes (create) – closed is Dublin, Cork & Limerick • Education on working rights • Encourage employment of young people and job creation • Chance to gain work experience and get money • Need better roads • Promotion of positives in Tipperary towns	
Recommendation *Poverty, Disadvantage and Social Exclusion.* *Sustaining Communities*	Youth unemployment is included in the LECP framework - Objective 3: <u>Address the high level of youth unemployment</u>. It is suggested that an additional framework Objective be included which is focused on youth engagement: Objective 4: <u>To maximise potential of life opportunities for young people and maximise their contribution to the sustainable development of the county.</u> Other specific actions suggested may be included at the next stage of the LECP plan when specific strategic actions are being developed/worked up. It is also recommended that framework Objective11, on mental health be broadened to include ‘<u>Integrated response to health and wellbeing in the community’.</u> A number of the issues raised above are accommodated and noted as Framework priorities such as broadband deficiency and rural isolation under the Sustaining communities Priorities. Phase 2 will work these priority areas up further and will refine and prioritise the areas that the LECP will focus upon.	
Sub No.	**Relating To**	**Received From**
19	Economic - Tourism	Tony Musiol – Chairman, Carrick-on-Suir Tourism & Economic Development Committee (COSTEDC)
Summary	The following is a summary of the key suggestions in the submission relating to the economic aspects: 1. Ormond Castle Quarter including new approach road through derelict ground, landscaping and development of the grounds around Ormond Castle and including the refurbishment of the town’s mediaeval walls. 2. Redevelopment of the “Wicklow Gardens” site as a major retail centre which gives the ideal town centre plan for two retail hubs (with Supervalu) enabling maximum benefit to town centre businesses. 3. Maximising the potential of the new Greenway to Clonmel including walking, cycling and river activities including the construction of a Marina Building to cater for such visitors and also dealing with cycling parking etc. Ensure that the navigation aids on the Suir from Waterford are maintained for navigation access for cruiser type boats. 4. Development of Comeragh College as an adult education/retraining centre with WIT/LIT and possibly UL as partners. 5. Use of St Joseph’s College as high quality Tourist Hostel, making maximising use of initiatives such as “Munster Peaks” and Butler Trail. 6. Creation of an Enterprise Centre to focus on bringing on new businesses building on the very successful Enterprise Competition held in 2013/14. 7. Rolling fund (private funding) to enable the renovation of derelict retail buildings in the town centre. 8. Redevelopment and refurbishment of the Heritage Centre. 9. Development of Kickham Street as outdoor Latin Quarter, maximising the wide streetscape.	

	10. Preserve the lanes and the medieval streetscape in the town centre, the Old Bridge and in Carrickbeg and long term develop these into a Gothic Medieval Quarter. 11. New Bridge over the Suir to take truck traffic out of Main Street but without harming the town centre as a place to shop, for business and for visitors. 12. Long term, may need extra parking (multi-story).	
Recommendation *Employment, Unemployment & Enterprise*	This submission relates to tourism and is specific to Carrick on Suir. Tourism will be covered under the key framework Objective 1:-"<u>To enable appropriate economic development opportunities in all parts of the County</u>". Tourism is viewed as having an ability to make a real impact on economic development and will therefore be a key strategic action of the LECP. The LECP will focus on key county tourism priorities and the Tourism Strategy, yet to be developed, will include not only the LECP priorities but also other relevant appropriate tourism actions. Submission will also be referred to the planning section re County Development Plan and the Carrick Municipal District office	
Sub No.	**Relating To**	**Received From**
20	Economic	Mike Croome-Carroll - Suir Valley Environmental Group
Summary	The following is a summary of the key suggestions in the submission relating to the economic aspects: • Identify current infrastructural deficiencies and seek to develop new and enhance existing transport systems within the county, particularly North/South links. • Identify successful county based construction firms with annual turnover below one million euro and assist/facilitate these firms in accessing in county Govt/EU funded projects. These smaller county based firms are more likely to employ local staff from within the county for tendered projects. i.e.: The River Suir Development Project.	
Recommendation *Employment, Unemployment & Enterprise*	The submission outlines suggestions re the Economic aspects of the LECP. Framework Objective 3 of the Employment, Unemployment and Enterprise Priority highlights the need to accommodate and <u>address infrastructural deficits</u>. It is likely that the North/South Road connectivity will be considered as part of the second phase of the LECP Plan preparation. Objective 1. Also recognises the need to enable appropriate economic development opportunities and further actions will be developed under this in the next phase of the plan.	
Sub No.	**Relating To**	**Received At**
21	Economic	Peter Ward, Country Choice, Nenagh
Summary	The following is a summary of the key suggestions in the submission relating to the economic aspects Local authority and business leaders combined strategy to turn vacant commercial and residential premises into mixed public/private rental accommodation for single people, retired people and young families.	
Recommendation *Poverty, Disadvantage & Social Exclusion*	The submission outlines a suggestion re the Economic, Social and Community aspects of the LECP. This aspect is covered in the Framework strategic documents in Objective 7 <u>Support people who find it difficult to sustain a home.</u> However the specific point raised may be considered as an action in the next phase of the LECP plan.	

Sub No.	**Relating To**	**Received From**
22	Economic Clogheen/Cahir	Carmel McCormack, Suir Valley Environmental Group (SVEG)
Summary	The following is a summary of the key suggestions in the submission relating to the economic aspects • Promotion of Mitchelstown Caves and inclusion of Slievenamon and surrounds as part of Munster Peaks catchment. • More focus on heritage and archaeology- walks, talks, festival events etc. Establishment of a Black Honey Bee Museum/Interpretative Centre as part of strategy to promote conservation of the native species and local food production. Bring disused railway lines into use as tourist/walking amenities. Commercial potential of renovating disused train stations hostels and cafes en route. • Develop river amenities- jetties, public river transport; public works clean up of river network. • Further develop craft food and drink industry. • Investment in such SME's over reliance on FDI for job creation. • Pursuit of Passive House Standard in construction, following the example of Cloughjordan eco village. • Development of and investment in renewable energy projects- rainwater harvesting, slurry to biomass, solar, hydro and biomass power generation projects.	
Recommendation *Employment, Unemployment & Enterprise*	This submission relates largely to tourism and is specific to the Suir Valley. Tourism will be covered under the key framework Objective 1:-"To enable appropriate economic development opportunities in all parts of the County". Tourism is viewed as having an ability to make a real impact on economic development and will therefore be a key strategic action of the LECP. The LECP will focus on key county tourism priorities and the Tourism Strategy, yet to be developed, will include not only the LECP priorities but also other relevant appropriate tourism actions. Submission will also be referred to the planning section re County Development Plan and the Municipal District office	
Sub No.	**Relating To**	**Received From**
23	Economic,	Cllr Seamus Hanafin, Tipperary County Council, Thurles MD
Summary	The following is a summary of the key suggestions in the submission relating to the economic aspects 1. Prioritising Clonmel, Nenagh and Cashel for attracting large scale FDI will be viewed as contentious and as excluding other towns in the county. 2. The LECP as currently drafted will meet challenges in attracting support from business and community groups, as well as Chambers of Commerce. 3. The Plan needs to include the Lisheen Mine site which is designated a potential site of Regional significance.	
Recommendation *Employment, Unemployment & Enterprise*	The key framework Objective 1:- "To enable appropriate economic development opportunities in all parts of the County". Is about ensuring that all areas of the county have access to appropriate economic opportunities. Some difficult choices will have to be made if every effort is to be made to secure appropriate employment in appropriate locations. The next phase of the LECP will work this area up in more detail and seek to ensure that all areas of the county will contribute to growing sustainable economic opportunity for all.	

<table>
<tr><th>Sub No.</th><th>Relating To</th><th>Received From</th></tr>
<tr><td>24</td><td>Economic</td><td>Maura Carey CAVA North Tipperary</td></tr>
<tr><td>Summary</td><td colspan="2">The following is a summary of the key suggestions in the submission relating to the economic aspects

• Non-existent or inadequate broadband service. Severely disrupts ability to attract and conduct business and puts rural communities at a competitive disadvantage.
• Further stimulus of local food industry. Local authorities to adopt a “green procurement policy”- organisations such as hospitals, state offices giving first priority to local producers. This would further extend to priority to guaranteeing shelf space in a locality for locally grown food.
• Further development of local tourism.
• Development of community energy projects.
• Waste management. Recycling bins should be places at all retail premises for consumers to dispose of packaging. Would relieve consumers of cost of recycling at home, as well as potentially providing more employment in waste management industry.</td></tr>
<tr><td>Recommendation
Employment, Unemployment & Enterprise</td><td colspan="2">A number of the issues raised above are accommodated and noted as Framework Objectives such as broadband deficiency and rural isolation. Objective 1 addresses the ability to enable appropriate economic development opportunities and Objective 3 recognises the need to identify to address the infrastructural deficits. Phase 2 will work these priority areas up further and will refine and prioritise the areas that the LECP will focus upon.

The remainder of the items referenced above will be forwarded to the relevant authority (Tipperary Energy Agency and Tipperary Tourism Company, etc.) considering the development of the LDS</td></tr>
<tr><td>Sub No.</td><td>Relating To</td><td>Received From</td></tr>
<tr><td>25</td><td>Economic</td><td>Edward O’Sullivan, Kilfeacle, Co. Tipperary.</td></tr>
<tr><td>Summary</td><td colspan="2">The following is a summary of the key suggestion in the submission relating to the economic aspects

There is little direct mention of Tipperary Town which I feel should be focussed as the initiatives and needs suggested and identified are, in my view – particularly relevant.</td></tr>
<tr><td>Recommendation</td><td colspan="2">This submission relates specifically to Tipperary Town. The core of the suggestion will be covered under the key framework Objective 1:-“<u>To enable appropriate economic development opportunities in all parts of the County</u>”. The submission will also be referred to the planning section re County Development Plan and the Cashel and Tipperary Municipal District office.</td></tr>
</table>

1.3 Key Stakeholder Consultation – Economic Issues

The following are the key issues identified by with main agencies and organisations that participated in the Local Economic & Community Plan (LECP) Framework Consultation Workshops held in June 2014:

Topic	Key Issues Identified at Framework Consultation Workshops – June 2014
Economic Infrastructure	• Access to quality broadband, particularly in rural areas • Provision of enterprise workspace • Development of food units/test kitchens within enterprise centres • Road upgrades – N24 upgrade to dual carriageway/motorway; Upgrade of R498 Between Nenagh& Thurles; provision of link road in Thurles; Shannon crossing at Ballina • Town improvements – upgrade of Liberty Sq., Thurles; development of historic centre & revised traffic management plan in Nenagh
Economic Development	• Co-ordinated approach to economic development & enterprise support • Need for a Digital Strategy to include Broadband audit • Need for property audit of high quality available offices or industrial sites suitable for FDI • Access to credit • Availability/sustainability of seed capital • Ensure sufficient zoned land for enterprise development and job creation • Identify and address barriers to development in towns and MDs • Lack of ETB Training Centre in Co. Tipperary • Need to increase uptake of National & EU Programmes
Enterprise Development & Job Creation/ Employment	• Climate to foster entrepreneurship • Need to create magnets of attraction/integrated offering for 'New Name' FDI investment which have a competitive advantage over other areas • Need to identify key focus sectors & locations for FDI e.g. strategic development zone, high value operations etc. • Need to create local operating environment for existing FDI client base • Development of enterprise clusters • Need to foster environment for creation of HPSUs • Need to achieve higher progression rate of microenterprises graduation to EI portfolio

	• Identification of opportunities - gap analysis within sectors in the county • Proactive accommodation of pre-planning meetings with prospective employers and investors • Supports to businesses employing > 10 employees serving the domestic market • Need to maximise sub-supply opportunities for Microenterprise & SMEs • Promote PLATO concept – FDI staff mentoring of microenterprise owner managers • Develop the nascent green enterprise sector • Facilitate firms to become export oriented • Companies to advertise job vacancies through DSP offices • Need for Jobs Fairs • Employers to be encouraged to employ LTU • Greater awareness of supports available and from what organisation • Need for standardisation of grant-aid to business e.g. LEO client supports & RDP client supports
Tourism Development	• Development of tourism potential of Lough Derg, SlieveFelim& Munster Peaks areas • Need to support tourism businesses/areas outside of recognised Fáilte Ireland destinations • Lack of product offering for priority segments in domestic market in areas outside of Fáilte Ireland destinations • Explore potential opportunities through Diaspora networks, Ambassador Programmes etc. in areas outside of Fáilte Ireland destinations • Investment in tourism assets & development of new visitor experiences to grow visitor numbers, revenue and increase length of visitor stays • Target particular markets for particular areas/products and develop brand • Need for providers to create integrated holiday packages • Facilitate added value opportunities for food, craft & clothing sectors • Completion of flagship projects i.e. BearaBreifne Way, Lough Derg Canoe Trail • Need for Rural Recreation Strategy • Branding & maintenance of trails • Funding & supports for festivals, exhibitions & shows • Continued support to Tidy Towns Groups and community initiatives to present positive county image • Need for practical tourism & hospitality sector training courses, digital training & mentoring etc. • Need to develop marketing tools to promote the county to international and domestic markets • Link with equine industry in terms of its tourism potential • Identification of priority products to be developed under RDP

Training & Upskilling	• Provision of Business Start-up Programmes as opposed to training courses • Identification & delivery of training programmes to meet needs of business • Monitoring of training needs of business owners and managers and provision of suitable programmes supports to meet these needs • Provision of previous FÁS 'Services to Business' type supports • Business Accelerator Programme required • Leverage opportunities in new 'Springboard' initiatives • Provision of accessible and appropriate programmes for job seekers – job search, second chance education etc. • Training for tourism sector • Engagement of employers in training & education to identity needs in a timely fashion • New media skills development & application • Elimination of anomalies in social welfare system that are barriers to training & upskilling • Tailored management development programmes for businesses • R&D support and product development support required for SMEs • Implementation of recommendations in report on ' Training & Education Needs of Businesses in Co. Tipperary'
Agriculture, Food & Forestry	• Identify and exploit Co. Tipperary's USPs in agriculture • Expansion in dairying post quota removal – what are issues to be addressed? What are economic & environmental impacts? • Development of artisan food sector and the 'Tipperary' brand • Provision of Levels 5 & 6 training to young farmers • Need to facilitate Farm Diversification under Rural Development Programme • Support equine industry • Streamline funding opportunities for food production businesses • Facilitate forestry owners to develop capacity of their assets • Identify potential for enterprise development from forestry e.g. wood products