



Comhairle Contae Thiobraid Árann
Tipperary County Council

A new Tipperary County Development Plan 2022 - 2028

~ Background Paper



Economy and Employment



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1.0 Introduction

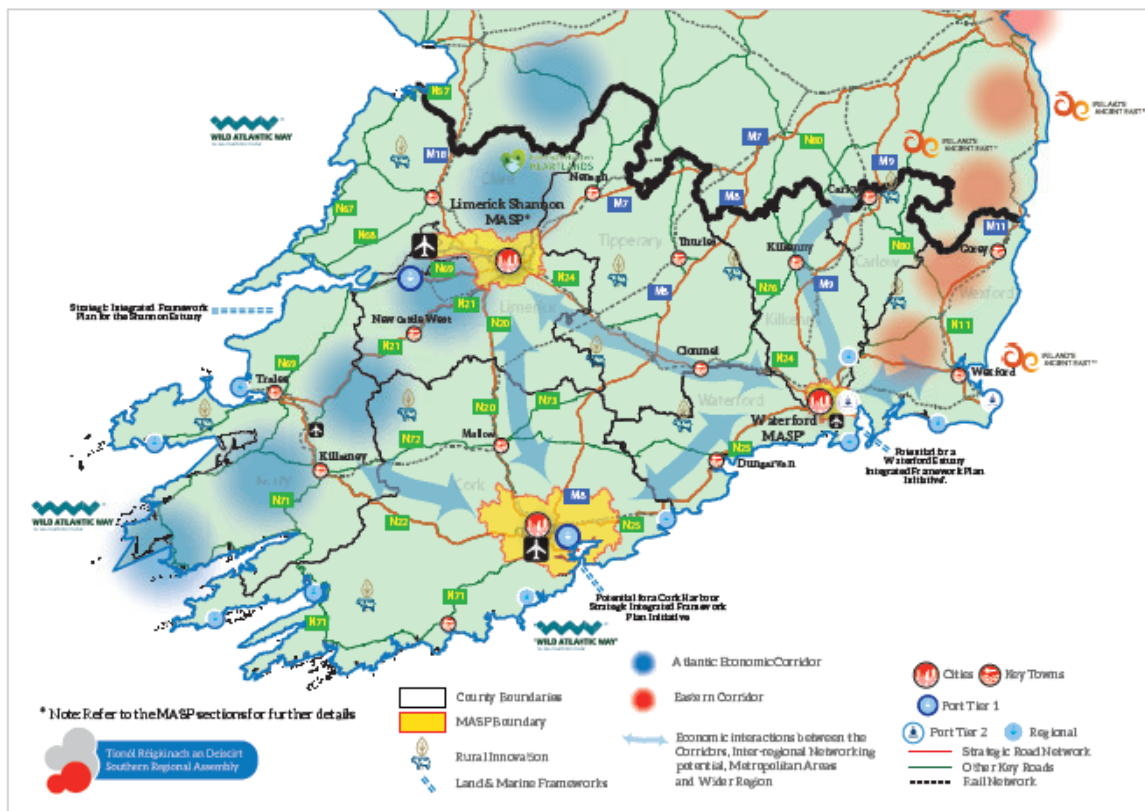
This briefing paper presents national and regional policy, and key socio-economic trends that will influence the preparation of a new Tipperary County Development Plan 2022 – 2028. Its function is to support and stimulate public and stakeholder participation in the Plan preparation process. It presents information on the enterprise and employment profile for the county and the strategic policy influences of the National Planning Framework (NPF) 2018 and in particular, the Southern Regional Spatial and Economic Strategy (RSES) 2020.

This paper is one of three papers prepared to help stimulate debate, discussion and input into the plan-making process, these papers should be considered together. The other papers are entitled: ‘Settlement, Population and Transport’ and ‘Low Carbon Society and Climate Resilience’.

2.0 Tipperary Enterprise and Employment Profile

Tipperary has a central location in the Southern region, with a strong infrastructural base and is well connected to the metropolitan areas of Limerick, Waterford and Cork and Dublin by regional transport linkages, including the motorways, N24 and rail network.

Figure 1: Tipperary in the Region



2.1 Enterprise and Employment Profile

In 2016, there was a workforce in Tipperary of 62,912 persons¹. Of this population, 60.4% were employed within Tipperary, 19.5% were employed outside Tipperary, 9.8% were classed as Mobile workers and 10.3% had a blank or uncodeable work destination.

The influence of the city areas of Limerick and Waterford is evident with 24.4% of the workforce commuting out of Tipperary. However, Tipperary had the 9th lowest rate of outbound commuters nationally with only a marginally higher rate than Waterford and Limerick.

In 2016, the largest industrial sector in the county was wholesale and retail trade, accounting for 13.8% of the workforce. Manufacturing was the next largest, with 13.7%. The top five employment sectors were completed by human health and social work activities at 11.1%, agriculture, forestry and fishing at 10.6% and education at 9.2%.

Tipperary is one of just three counties where the agricultural sector accounted for over 10.0% of those at work (Cavan and Monaghan being the others) and this illustrates the importance of agriculture and forestry to the local economy.

The county's diverse economic assets include:

- A Life Sciences/Bio Pharma Hub around Clonmel that includes Abbott Vascular, Boston Scientific, Merck Sharpe Dohme, and Pinewood Laboratories etc,
- Manufacturing enterprises such as Bulmers, Medite Ireland, Procter and Gamble, Carey's Glass etc,
- Food processing industries including ABP Food Group Cahir, Rosderra Meats, Roscrea, Ribworld Fethard, Tipperary Natural Mineral Water, and the members of the Tipperary Food Producers Network of artisan food producers etc,
- A strong network of rural towns and villages which play a significant role in providing services, tourism facilities, recreation and employment,
- Superb fertile land which provides an ideal environment for agriculture and food production,

¹ 2016 Place of Work Census of Anonymised Records (POWCAR),

- A horse breeding and racing industry which includes the world renowned Coolmore Stud Farm and Ballydoyle Racing Stable,
- Key tourism attributes are the built and natural heritage of the county and the opportunities for outdoor recreation in line with the Failte Ireland Tourism Brands. Attractions include Lough Derg, the Suir Blueway mountain ranges such as the Knockmealdowns, Galtees, Slieve Felims, and the Devil's Bit; the Rock of Cashel, Holycross Abbey, Cahir Castle, Nenagh Castle and Roscrea Castle etc

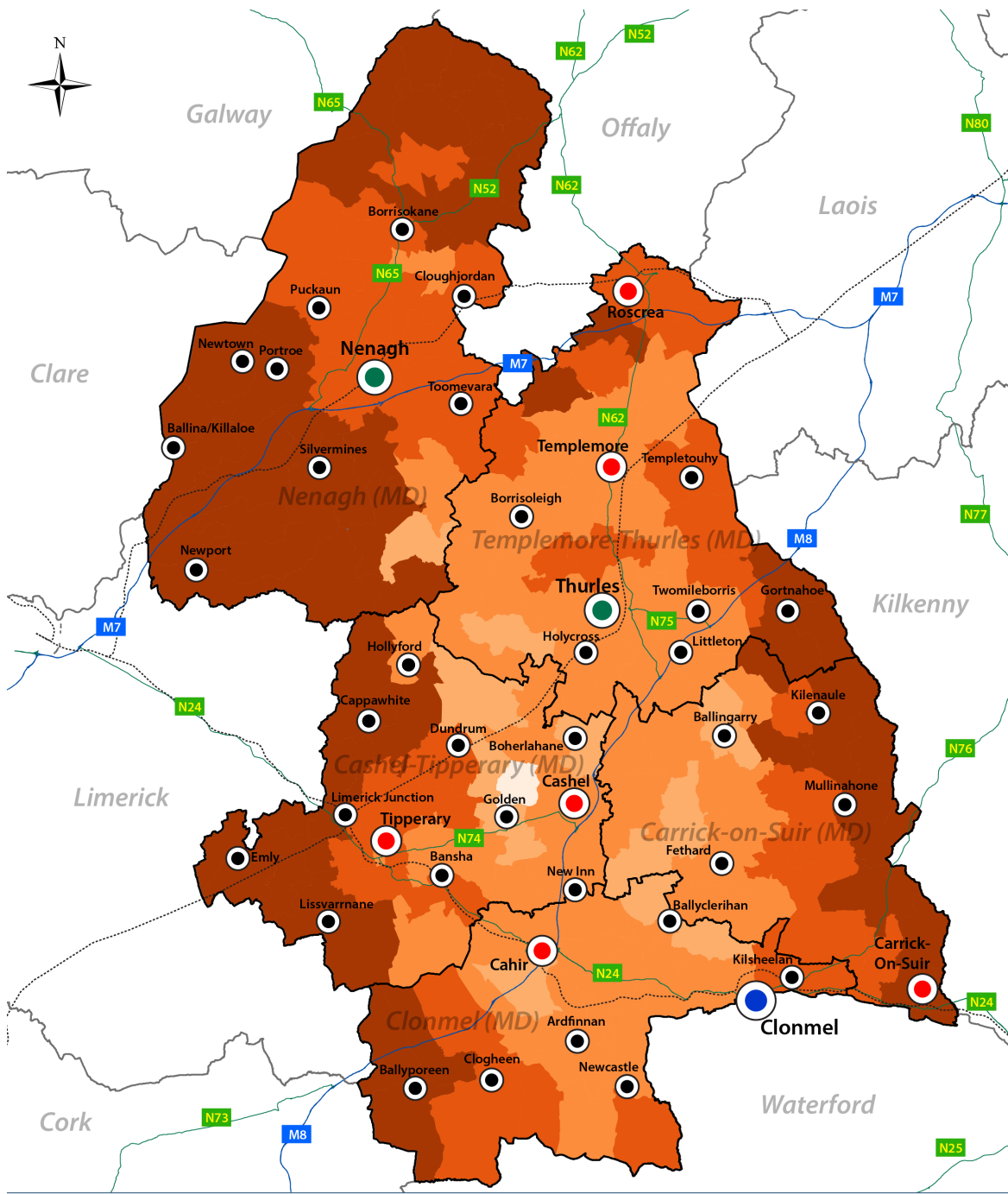


Figure 2: The Lough Derg Lakelands

- 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.

2.2 Employment and Commuting

Inter-connectivity with the city regions is a key economic asset for Tipperary. The main destinations for outbound commuters are Limerick, Kilkenny, Waterford and Cork County. In terms of the percentage of the workforce that commute 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, see figure 3.



Percentage of Workers Commuting out of Tipperary, 2016


<p>POWCAR 2016 % Out of County Commuters, '16</p> <ul style="list-style-type: none"> Less than 3% 3% to less than 5% 5% to less than 10% 10% to less than 15% 15% to less than 20% Greater than 20% 	<p>Settlement Hierarchy</p> <ul style="list-style-type: none"> Regional Sub Regional District Towns Service Centres 	<p>Contextual Layers</p> <ul style="list-style-type: none"> Municipal Districts Motorway Roads Railway 	<p> Comhairle Contae Thiobraid Árann Tipperary County Council</p> <p><small>Ordnance Survey Ireland Licence CCMA/TipperaryCC © Ordnance Survey Ireland/Government of Ireland Data Source: CSO POWCAR</small></p> <p style="text-align: right;">0 5 10 20 Km</p>
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Figure 3: Percentage of workers commuting out of Tipperary, 2016

3.0 Policy Frameworks

3.1 Project Ireland 2040

Project Ireland 2040 is the government's long-term (20+ years) overarching strategy for all Ireland planning and investment. It is comprised of the NPF and the National Development Plan (NDP) both adopted in 2018. The NPF sets out a plan for national population and economic growth based on the following key principles:

- Ambitious growth targets for the cities of Cork, Limerick and Waterford to enable them to grow by at least 50% to 2040 to ensure that they become cities of scale.
- Delivering compact growth by targeting a greater proportion (40%) of future housing development to be within and close to the existing 'footprint' of built-up areas.
- Reversing town and village and rural population decline by encouraging new roles and functions for buildings, streets and sites.
- A transformational shift of our economies and societies towards climate resilient and sustainable development, in the way we meet our needs for power, heat, travel, land use, and use of resources.
- Enable people to live closer to where they work, moving away from the current unsustainable trends of increased commuting.
- Regenerate rural Ireland by promoting environmentally sustainable growth patterns.
- Plan for and implement a better distribution of regional growth, in terms of jobs and prosperity.
- Transform settlements of all sizes through imaginative urban regeneration and bring life / jobs back into cities, towns and villages.
- Co-ordinate delivery of infrastructure and services in tandem with growth, through joined-up NPF/National Investment Plan and consistent sectoral plans, which will help to manage this growth and tackle congestion and quality of life issues in Dublin and elsewhere.

The NPF provides the overriding strategy to inform the development of the regional Assembly areas and thereafter of the county areas through their County Development Plans.



Figure 4: Hierarchy of Plans

The NDP provides the funding and delivery frameworks for the NPF and under funding schemes, money will be allocated competitively to the best projects, which leverage investment from other sources. The four new funds will help to ensure balanced regional development and are designed to stimulate renewal and investment in rural and urban areas, the environment and innovation.

1. €2 billion Urban Regeneration and Development Fund (URDF) will secure more compact, sustainable growth in Ireland's five cities and other large urban centres,
2. €1 billion Rural Regeneration and Development Fund (RRDF) will support job creation in rural areas, address de-population of rural communities and support improvements in our towns, villages and their hinterlands that enhance the quality of life of communities and enhance their attractiveness for families who want to live and work there,
3. €500 million Climate Action Fund (CAF) will support initiatives that contribute to the achievement of Ireland's climate and energy targets,
4. €500 million Disruptive Technologies Innovation Fund (DTIF) will see investment in the development and deployment of disruptive innovative technologies and applications, on a commercial basis, targeted at tackling national and global challenges.

The County Development Plan will be instrumental in setting out how Tipperary can benefit from funding from these sources by identifying strategic opportunities and projects.

3.2 Southern Regional Spatial and Economic Strategy

The RSES sets out a planning and economic framework based on the role of the regional cities, supported by a network of strategically located ‘Key Towns’, towns and villages and rural areas. The RSES replaces the old Regional Planning Guidelines 2010 for the South East and Mid-West Regions, and sets out new vision for an economic strategy combined with a spatial strategy. The RSES also identifies key networks in terms of settlements that could capitalise on their shared economic strengths. The RSES also sets out settlement typology and identifies Clonmel, Thurles and Nenagh as strategic ‘Key Towns’ in the region and specifically addresses them and their roles in the Region. It is projected that the region will accommodate between 280,000 – 343,500 additional persons by 2031, of this, 20,500 – 24,500 will be located in Tipperary.

It is an objective of the RSES to support the development of a National Bio-economy Hub in Lisheen, Co. Tipperary. This will be supported by the EU bio-economy strategy and Horizon 2020 for the sustainable use of natural resources. Developments in this area could enable the Region to become the ‘European Model Demonstrator Region of the Bio-Economy’ and a significant economic and employment driver with the potential to significantly contribute towards meeting Ireland’s climate change targets as a strategic site of European significance.

The economic vision for the Region is to enable sustainable, competitive, inclusive and resilient growth. This requires the development of a strong and diverse economic base. The RSES seeks to achieve this vision through the following economic principles:

- Smart Specialisation
- Clustering
- Placemaking for enterprise development
- Knowledge Diffusion, and
- Capacity Building.

3.3 Local Economic and Community Plan

The Tipperary Local Economic & Community Plan 2015 - 2020 was developed under Section 128B of the Local Government Act 2001 by the Tipperary Local Community Development Committee (LCDC) and Tipperary County Council’s Economic Development and Enterprise Strategic Policy Committee. The LECPC for Tipperary

contains high level goals and actions to drive integrated economic, social and community development in the county over the next six years. The review of the current LECP will occur alongside the review of the Tipperary County Development Plan and ensure that community driven high-level goals and objectives and priorities and actions are developed and agreed at the local level.

4.0 Spatial Planning and Economy and Employment

4.1 Tipperary as part of the Southern Region

As part of the Southern Regional area, the Tipperary County Development Plan must consider the overall planning framework as set out by the RSES for the region. The key objectives of the RSES are outlined in figure 4, it can be seen that many are relevant to the economy of Tipperary.

It is an objective of RSES to sustainably develop, deepen and enhance overall regional economic resilience, by widening the economic sectors, boosting innovation, export diversification, productivity enhancement and access to new markets. The strengthening and growing of the metropolitan areas, through the harnessing of the combined strength of Cork, Limerick and Waterford is an objective of the RSES. In this respect, Tipperary has a strategic advantage in its location in the Region, its strong connectivity to Dublin and to the southern regional cities of Cork, Limerick and Waterford.

The new County Development Plan will identify how these linkages with our Regional Cities can be strengthened, through tailored economic partnership, collaboration and infrastructural development.

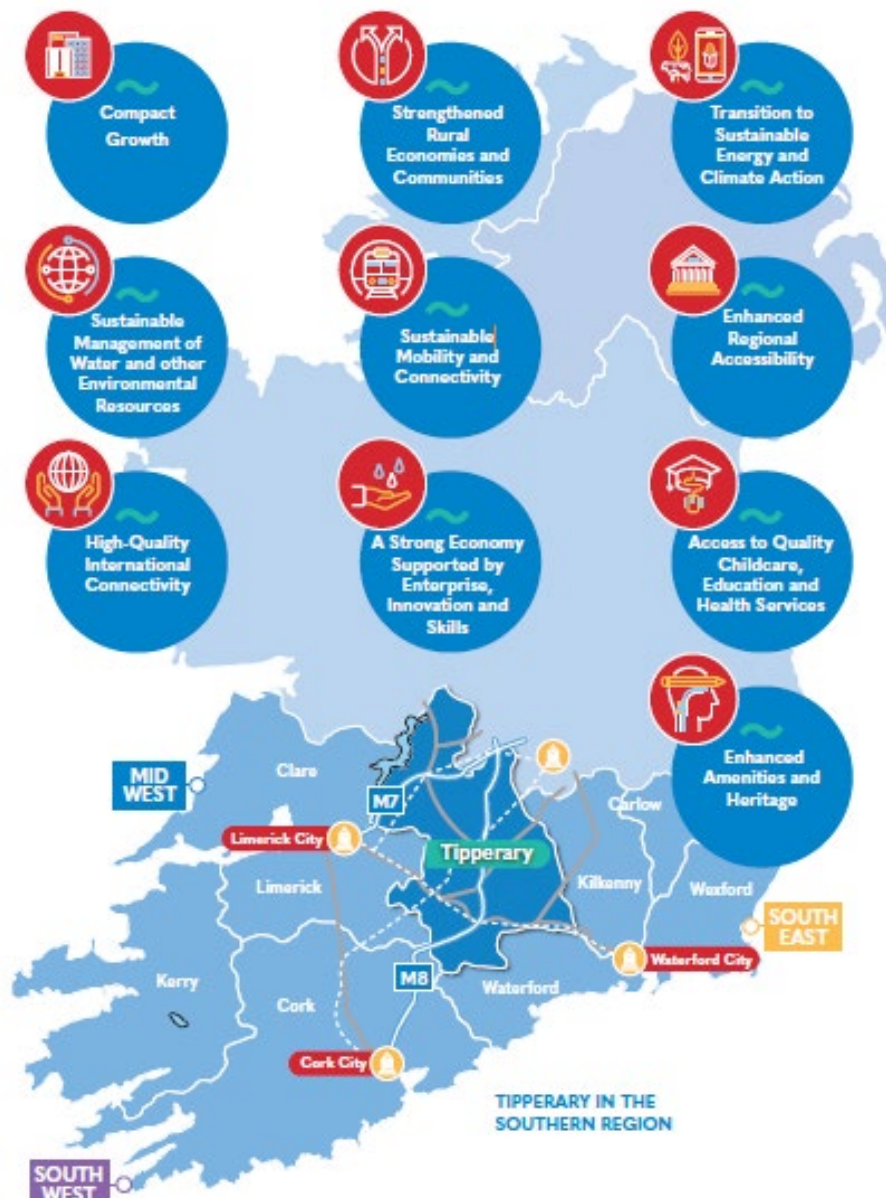


Figure 5: Tipperary and key regional objectives

4.2 Low-Carbon Economy

The implementation of the Government's Climate Action Plan, (DCCAE, 2019) and commitment to achieving a national target of zero greenhouse gas emissions (GHG) by 2050 is an integral consideration for the County Development Plan. The RSES has identified three priority areas for action to bring about a transition to a Low Carbon Economy and Society:

- Decarbonisation;
- Resource Efficiency;
- Climate Resilience.

Action on climate change will be expected across in all economic sectors and will require a combined effort between all local authorities and their communities, government departments and state agencies.

There is support from central Government for initiatives that contribute to the achievement of Ireland's climate and energy targets including:-

- Supporting innovation and capacity building towards the development of climate change solutions capable of being scaled and delivering benefits beyond a once-off impact
- Generating wider socio-economic benefits such as job creation, air quality improvements, reduction in fuel poverty, bio-diversity and community resilience and development.

Tipperary can benefit from investment in a move towards a low-carbon economy. Investment in local renewable energy projects can give a solid financial return for local rural communities, from energy exported to the national grid, an example of this approach is the Templederry Windfarm. Energy produced locally, through micro generators of energy, i.e. solar panels, can reduce costs for businesses, farmers and householders. In addition, investment in energy retrofitting and upgrades is labour intensive and provides local employment.

4.3 Towns, Place-making and Capacity Building

Our urban and rural towns and villages are the backbone to the social and rural fabric of our county, and are vital to the future stability of our communities. It is expected that the new County Development Plan will seek to support the economic growth of towns, and to reverse the trends of decline in population and economy in urban areas, and rural settlements.

In particular, it is recognised that the creation of attractive places to live and work is good planning and good enterprise policy. It can provide a competitive edge to Irish towns and villages when it comes to attracting and retaining the skills and talent on which foreign direct investment (FDI) is reliant.

Since the publication of Project Ireland 2040, the Council and its partners has welcomed the support of Government Departments for many strategic Tipperary projects, including

Regional Sport Hubs, Enterprise and Cultural Centres, 'Hero' Tourism Destination Experiences and transformative public realm projects.

The County Development Plan will seek, in collaboration with stakeholders such as the IDA and local town centre associations and businesses, to be ambitious for towns and villages and to encourage their enhancement as attractive and vibrant places to invest.



Figure 6: Clonmel Town Centre

The retail economy employs significant numbers and is central to the life and vitality of towns and village centres. In recent years the trend to online shopping has had a profound negative impact on towns and villages. There is a need for policy makers and business operators, to adapt to changing shopping habits, and to consider issues such as improving customer experience in settlement centres. In recent months, the Cov-19 pandemic has also had a profound impact on our retailing habits, and this has placed another layer of pressure on traditional forms of retailing in town and village centres.

Policy for retail development is outlined in the Retail Planning Guidelines for Planning Authorities (DECLG, 2012). The new County Development Plan will apply the principles of the Guidelines to ensure that retail development is focussed on urban and village centres with the application of a sequential approach for retail development. In addition, the Plan will seek to improve the physical appearance, vitality and vibrancy of town centre and village locations, thus improving customer experiences, through collaboration with stakeholders such as Retail Traders Associations, Chambers of Commerce etc through regeneration / public realm projects and other measures.

4.4 Rural Development and Agriculture

Tipperary is a rural county by its nature with many small rural villages, highly productive land and variety of landscape types; this is recognised as a robust and important strength of the County. However, rural areas need to diversify to retain their population and supplement income.

The agriculture, forestry, fishing resource base offers many opportunities for diverse enterprise



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development, for example, renewable energy production, as well as tourism, leisure and recreation development. In Tipperary, there are already good examples of rural diversification, for example, in the tourism, artisanal food production sector and renewable energy sector.

Rural revitalisation is a key focus of Government, and the Action Plan for Rural Development (DRCD, 2018) aims to unlock the potential of rural Ireland through a framework of supports at national and local level. The Action Plan has 5 key Pillars:

- Supporting Sustainable Communities
- Supporting Enterprise and Development
- Maximising our Rural Tourism and Recreation Potential
- Fostering Culture and Creativity in rural communities
- Improving Rural Infrastructure and Connectivity.

The CLÁR programme forms part of Pillar 1, and provides funding for small scale infrastructural projects in rural areas that have suffered the greatest levels of population

decline. The CLÁR areas in Tipperary (Figure 7) are located typically in upland areas away from the main population centres; and illustrate the areas and villages most at risk from population and economic decline.

Other relevant policy supports and initiatives for rural areas include:

- Delivery of hi-speed broadband (National Broadband Plan);
- Forestry (Growing for the Future and Business Area Unit Strategic Plans);
- Energy (Ireland's Transition to a Low Carbon Energy Future 2015-30);
- Tourism (Failte Ireland)

The RSES supports innovation, enterprise start-ups and competitiveness of rural areas and sets out the following objectives to directly inform the new County Development Plan:

- **Innovation in Rural areas:** It is an objective to develop innovation hubs and centres of excellence (with particular opportunities for innovation in agri-food, agri-tech, creative industries, knowledge economy etc.) as local drivers for growth.
- **Diversification:** It is an objective to further develop a diverse base of smart economic specialisms across the rural Region, including innovation and diversification in agriculture (agri-Tech, food and beverage), the marine (ports, fisheries and the wider blue economy potential), forestry, peatlands, renewable energy, tourism (leverage the opportunities from the Wild Atlantic Way, Ireland's Ancient East and Ireland's Hidden Heartlands brands), social enterprise, circular economy, knowledge economy, global business services, fin-tech, specialised engineering, heritage, arts and culture, design and craft industries as dynamic drivers for the rural economy.



Figure 7: Clar EDs in Tipperary

The RSES recognises the need for the revitalisation of rural areas through adapting our small towns and villages, and increasing collaboration between networks of settlements to seek higher value, diversified jobs for a higher quality of life.

Important and diverse rural projects and programmes in Tipperary currently underway include; the Tipperary Food Producers, the Munster Vales programme, Community Power, tourism in the Lough Derg Lakelands etc. Government funding sources for rural development include, the Regional Enterprise Development Fund and Regional Action

Plan for Jobs, Action Plan for Rural Development, Rural Development Programme 2014 – 2020.

In particular, and important for Tipperary, it is expected that the agriculture and equine industries will continue to be a key part of the economy and will continue to support jobs and rural diversification in Tipperary. In this respect, Food Wise 2025: A 10-year Vision for the Irish Agri-Food Industry sets out a strategic plan with growth projections for 23,000 additional direct jobs.



Figure 8: Energy in Agriculture, Gurteen 2019

The County Development Plan, along with stakeholders, will seek to develop a planning framework that will support diversification in the rural economy, and facilitate rural dwellers to establish new enterprises to improve their income, provide employment for family and utilise available resources. The Plan will also seek to identify initiatives, with the support of stakeholders, that will attract funding, and protect and support opportunities for diverse enterprise development, renewable energy production as well as tourism, leisure and recreational development in Tipperary's rural areas.

4.5 Large-Scale Employment Development

The NPF states that planning to accommodate strategic employment growth at regional, metropolitan and local level should include consideration of:

- Current employment location, density of workers, land-take and resource/infrastructure dependency, including town centres, business parks, industrial estates and significant single enterprises;
- Locations for expansion of existing enterprises;
- Locations for new enterprises, based on the extent to which they are people intensive (i.e. employees/ customers), space extensive (i.e. land), tied to resources, dependent on the availability of different types of infrastructure (e.g. telecoms, power, water, roads, airport, port etc.) or dependent on skills availability;
- Locations for potential relocation of enterprises that may be better suited to alternative locations and where such a move, if facilitated, would release urban land for more efficient purposes that would be of benefit to the regeneration and development of the urban area as a whole, particularly in metropolitan areas and large towns.

The RSES objective RPO 6 states:

- a. Ensure employment locations follow the settlement hierarchy as set out in the County Development Plan, and ensure they are built fit-for-purpose. This includes the provision of access to utilities, connectivity, and other enterprise development factors;
- b. Identify future locations for strategic employment development having regard to accessibility by sustainable transport modes and environmental constraints.
- c. Support a positive presumption in favour of locating appropriate employment where it would address unemployment blackspots, support sectoral and location-based strengths and synergies with existing employers, take advantage of 'ready to go' property solutions and local ambition.

Having consideration to the above, Tipperary County Council has identified three strategic employment zones in Tipperary:

- Clonmel: The 300 acre publicly owned land bank in Ballingarrane, Clonmel targeting the Pharma/Medical Devices and Food Processing clusters.
- Lisheen: The 1,100 acres site in Lisheen, Thurles which is currently designated as one of 6 model demonstrator regions in the EU as bio-economy cluster and for which €5 million was secured to progress the bio-economy initiative.

- Nenagh: The 35 acres in Streame in Nenagh, with the potential to deliver a Financial/Payments Technology cluster.

The County Development Plan, in conjunction with the LECF, and in consultation with stakeholders will assess, and plan for further strategic employment zones in Tipperary.

4.6 Networks

The RSES recognises the importance of ‘networks’, or settlements sharing assets and collaborating to drive economic growth. Tipperary already has concentrations of areas with specialisms, for example in food and drink, renewable and bio-energy, tourism and pharmaceutical industries. The importance of improved intra-regional connectivity between networked settlements - public transport, rail, inter-urban walking and cycling routes, greenways and e-mobility initiatives is also important to help support enterprise. The new County Development Plan will seek in the plan-making process, to consult with stakeholders, and hear their input on how networks can be identified and developed in Tipperary to build on the particular strengths of the county in the region.

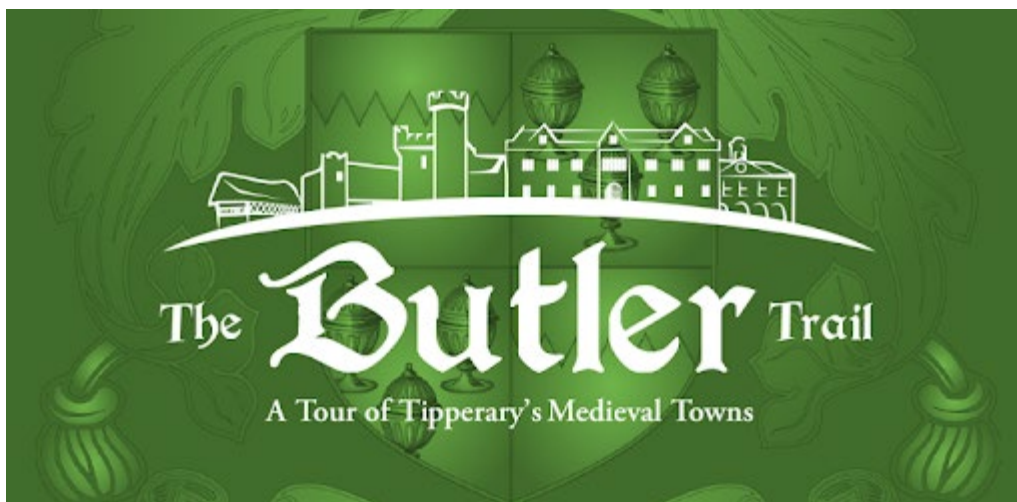


Figure 9: Logo for the Butler Trail

4.7 Tourism

The Strategic Tourism Marketing, Experience & Destination Development Plan 2016-2021², was prepared by the Council in 2016. Priority towns and villages are identified in terms of their tourism potential and a detailed action plan is set out for 4 zones:

² <https://www.tipperarycoco.ie/community-and-economic-development/tipperary-tourism-company>

- Zone A. Roscrea & Nenagh
- Zone B. Nenagh & Thurles
- Zone C. Cashel, Tipperary and Cahir
- Zone D. Clonmel and Carrick-on-Suir.

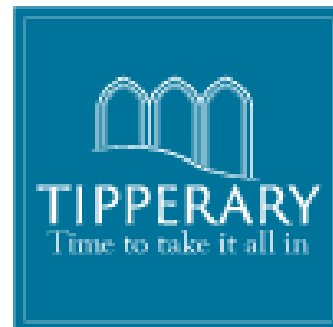
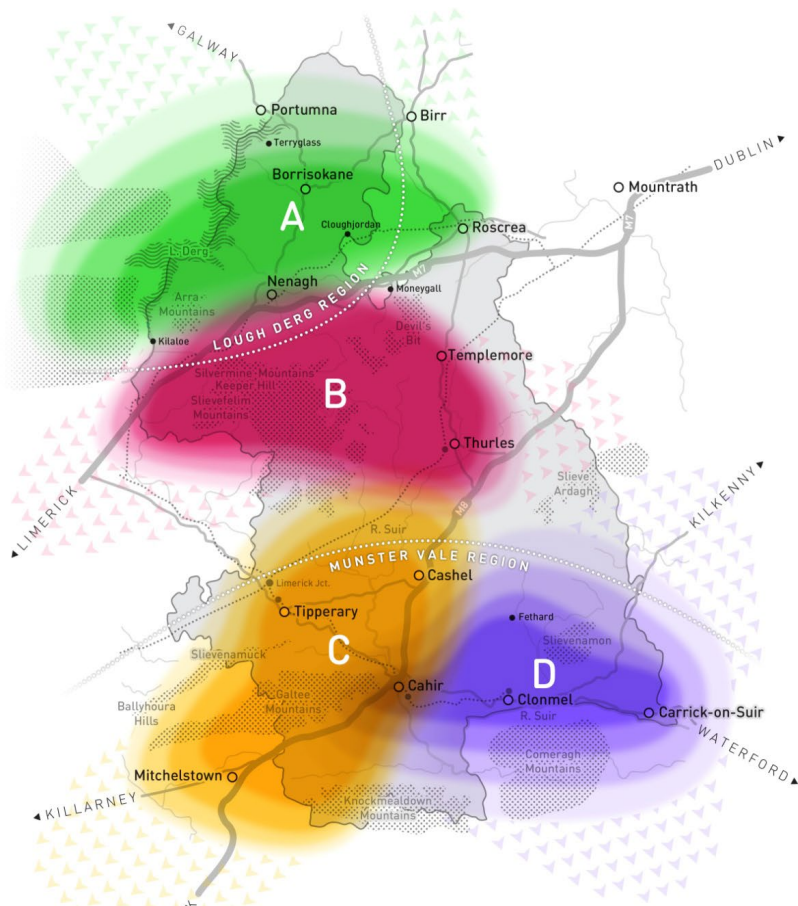


Figure 10: The Relationship of Zones, Gateway Towns and Surrounding Counties

The Tipperary Tourism³ Company was set up in 2014, to promote and develop Tipperary as a visitor destination, and to encourage sustainability through product offering, up skilling of providers and extending visitor lengths of stay and spend within the county. Tipperary is located within two of Failte Ireland's National Tourism Destination Brands Ireland's Ancient East, Ireland's Hidden Heartlands; this provides great impetus and direction to tourism in Tipperary and has supported key tourism products including: The Lough Derg Lakelands, The Munster Vales, The Suir Blueway, The Butler Trail etc.

The new County Development Plan, with stakeholder input, will seek to put in place a framework that will support investment and innovation in tourism, protect our landscape

³ <https://tipperary.com/>

and heritage assets, being a critical part of our tourism offer, and to enhance the visitor experience in our towns through public realm important and regeneration initiatives.

5.0 Conclusion

The document aims to give an overview of the policy frameworks and influences, funding sources, synergies and stakeholders, involved in the development of a diverse, sustainable and innovative economy. It is understood that the economy is driven by society, and also that our society is changing rapidly due to influences such as climate change, Covid-19 and Brexit.

Positive and creative input to the new County Development Plan review process from citizens, communities and businesses, will help tailor a planning framework for Tipperary that will deliver infrastructure, support innovation in the economy, and help attract funding from central government, and input is sought and welcomed during the Plan making process.