

# South Tipperary economic and other indicators, 2009-2010

## Result area 1: Competitiveness

**Average per Capita Disposable Income** (data set two years behind).

### From previous reports

- Baseline was set in 1999 and it was 85% of the national average at that time.
- In the 2003 data it is 90.8%.
- Target: 92% by 2006

The county is on the way to meeting the target of 92%. Within the South East, South Tipperary has a consistent rise in the index since the baseline of 1999, the only area that has done so. South Tipperary comes second to Waterford. The comparative trend is more positive with South Tipperary gaining 5.8 points on the index relative to Waterford (-0.8), Carlow (-0.3), Kilkenny (1.7) and Wexford (1.7).

### **3.6 Future Economic Priorities 2009-2012**

#### **Indicator 2: Average Disposable Income per Capita**

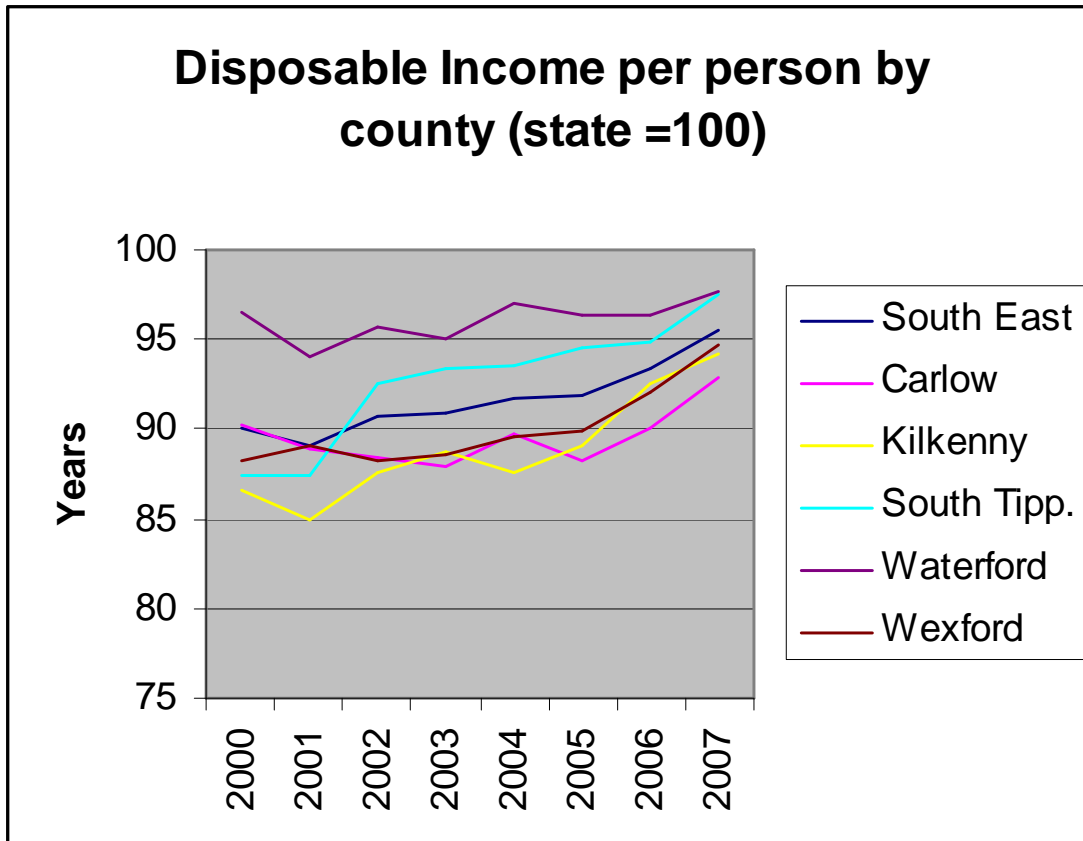
**Target: 95 % by 2011**

A report from the CSO<sup>1</sup> shows that, up to 2007 at least, South Tipperary per capita disposable income was rising to meet that of Waterford's and was above the regional average. However the CSO notes that 'the county data should be regarded more as indicative levels rather than as accurate precise figures'.

#### **Indices of Disposable Income per person by region and county, 2000 -2007, State at 100%**

	2000	2001	2002	2003	2004	2005	2006	2007
South East	90.0	89.1	90.7	90.9	91.7	91.9	93.4	95.6
Carlow	90.2	88.9	88.4	87.9	89.7	88.2	90.0	92.8
Kilkenny	86.6	84.9	87.6	88.8	87.6	89.1	92.6	94.2
South T	87.4	87.4	92.5	93.3	93.6	94.5	94.8	97.5
Waterford	96.5	94.0	95.7	95.	97.1	96.3	96.3	97.7
Wexford	88.3	89.0	88.2	88.5	89.5	89.9	92.0	94.7

<sup>1</sup> Source: County Incomes and Regional GDP report 2007, CSO, Table 4, page11.



The Second Review of the County Strategy notes (3.1) that this index has been recalibrated by the CSO. This might account for the difference between the 2003 figures above.

However there would appear to be a fall in GNP per capita nationally in 2008 as compared to 2007<sup>2</sup> and we may therefore see a fall regionally and in South Tipperary. The indicator to watch is how South Tipperary performs relative to the region, does it continue its rise to meet the Co. Waterford level or fall back to below it?

Latest data available at January 2011 is 2007.

### 1.3 Internet access

#### 3.6 Future Economic Priorities 2009-2012

##### Indicator 3 Broadband access

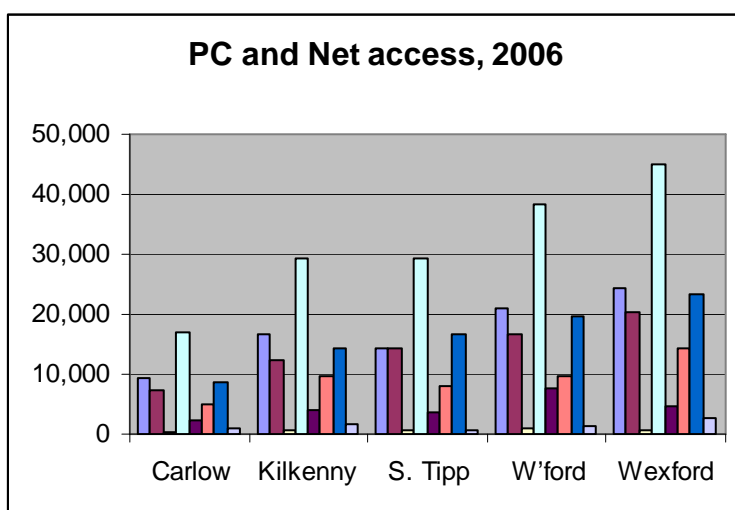
**Target :** Increase in broadband access from 13% (2006) to 17% by 2012.

‘Number of private households in permanent housing units in each Province, County and City, classified by personal computer ownership and access to the internet, 2006’<sup>3</sup>

<sup>2</sup> (IPA Guide 2010, 406)

<sup>3</sup> CSO report

	PC? Yes	PC? No	Not stated	Total of households	Internet Broadband	Internet Other connect.	No access to internet	Not stated
Carlow	9,248	7,424	402	17,074	2,213	4,916	8,802	1,143
Kilkenny	16,601	12,273	604	29,478	3,919	9,545	14,283	1,731
S. Tipp	14,475	14,227	520	29,221	3,557	8,136	16,756	772
W'ford	20,955	16,580	909	38,444	7615	9761	19776	1292
Wexford	24203	20,183	710	45096	4510	14396	23446	2744



Alone among the counties of the South-East, South Tipperary households (in 2006) were as likely not to have a computer as having one.

There is no post-2006 CSO data. Comreg have regional data from 2008 as follows. Next detailed data will be available from the 2011 Census.

### Regional analysis

In the first quarter of 2008, the percentage of households with a home computer was higher in the Southern and Eastern (SE) region than in the Border, Midland and Western (BMW) region.

Almost 73% of households in the SE region owned a computer compared to 63% in the BMW region. Computer ownership in the SE region increased from 708,000 in the first quarter of 2007 to 782,500 in the same period of 2008. In the BMW region, the number of households with a home computer increased from 222,000 to 249,000 over the same period. See *Table 4.1*.

The percentage of households with an internet connection also continues to be higher in the SE region than in the BMW region. Some 66% of households in the SE region now have internet access. The corresponding figure for the BMW region is 53%. See *Table 4.2*.

The **National Broadband Scheme** was set up by Government to bring internet services to those parts of the country not previously covered. By end 2009, 82% of the NBS areas had been covered, servicing some 8900 households. The Scheme has been completed in the county. 6230 premises in the following 27 EDs have been covered (Ardfinnan, Ballycarron,

Ballygriffin, Bruis, Burncourt, Clonbeg, Cloneen, Coolagarranroe, Cullen, Curraheen, Derrygrath, Emly, Garrangibbon, Glengar, Golden, Kilcoran, Kileenasteena, Kilpatrick, Lattin, Oughterleague, Poyntstown, Rodus, Shronell, Thomastown, Tubbrid, and Tullaghmelan).

A new **Rural Broadband Scheme** has been discussed for 2011. It is intended for those people who cannot get a service from internet providers and who are outside the area of the existing National Broadband Scheme.

The Metropolitan Area Networks are rings of fibre optic cable running through the main towns in the county. At end 2009, Clonmel MANS was lit up with five carrier companies and seventeen customers (of whom seven are County Council sites) and a much larger number of end users. The MANS in Cahir, Tipperary, Carrick-on-Suir and Cashel were handed over to Enet towards the end of the year. While three of these have a connection onwards (backhaul) and can therefore be lit up if a number of sizable customers can be identified, Cashel has no connection at present, a factor which is a major obstacle for it.

Greater Internet access should encourage a rise in the number of computers though broadband (presumably = Internet) access is the main issue, not pc ownership.

The picture at the end of 2010 is generally similar. Clonmel MANS has five carrier companies and fifteen ‘drop connections’ and a much larger number of end users. The other MANS have no connections at present with Cashel having no backhaul though I understand that there are possibilities for this being discussed at present.

### 3.6 Future Economic Priorities 2009-2012

Indicator 1: Level of Investment into the County in the areas identified

Target: €42,000,000.

Areas identified: Broadband, Rail, Roads, Energy, District Centres, Slieve Ardagh Business Plan,

#### **Investment in Rail 2009**

This information was not received

#### **Investment in Roads 2009**

Capital Expenditure 2009 €25,937,344.06

Capital Expenditure 2010 €13, 506,572 plus €1,966,93 for the new machinery yard in Carrigeen, Clonmel, the rest being Roads Improvement related

#### **Childcare capital investment 2009**

There was no central government investment in childcare facilities in the county in 2009<sup>4</sup>

There was no capital investment in 2010 either.

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<sup>4</sup> Gerry Hickey by phone, 14/01/10

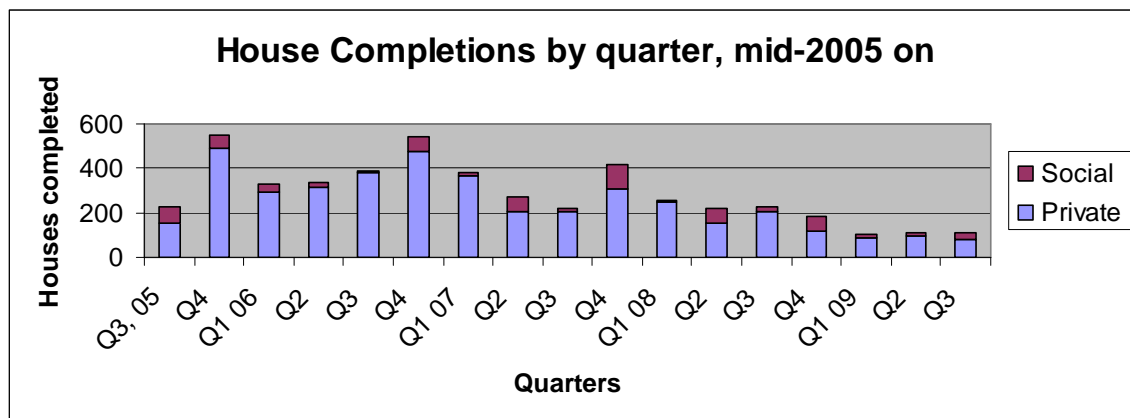
Three services who had been granted funding in 2007/2008, opened in 2010 in the county. They were Bright Sparks in Ballingarry, Happy Days in Ballyporeen and Lullabies and Laughter in Aherlow. There is no capital fund for 2011 other than a small number of projects agreed nationally in 2007/2008. None of these are in South Tipperary. There is a request with the Dept. for emergency funding for the community service in Fethard.

### Investment in Housing 2009

Area	2009	2010
County	7,367,620	€8,334,262
Cashel	€997,200 + €14, 056 energy efficiency measures	€626,000.
Clonmel	€2,340, 000	€ 1,070,000
Tipperary	695,000	€ 525,000
Carrick-on-Suir	1,220,000	767,729
<b>total</b>	<b>€12, 633,876.</b>	<b>€11,322,991.</b>

### House completions, Housing Returns, Dept. of the Environment<sup>5</sup>

	Q3, 05	Q4	Q1 06	Q2	Q3	Q4	Q1 07	Q2	Q3	Q4	Q1 08	Q2	Q3	Q4	Q1 09	Q2	Q3
Private	156	492	294	314	382	475	369	208	206	307	248	151	206	114	91	92	82
Social	69	58	32	26	4	63	12	66	14	108	9	70	21	71	11	20	25



It would be difficult to accurately convert these figures to investment costs. Figures post end of 2009 not yet available.

### Alternative energy:

<sup>5</sup> Dept of Environment website. Figures up to third quarter of 2009 only, 12/1/11.

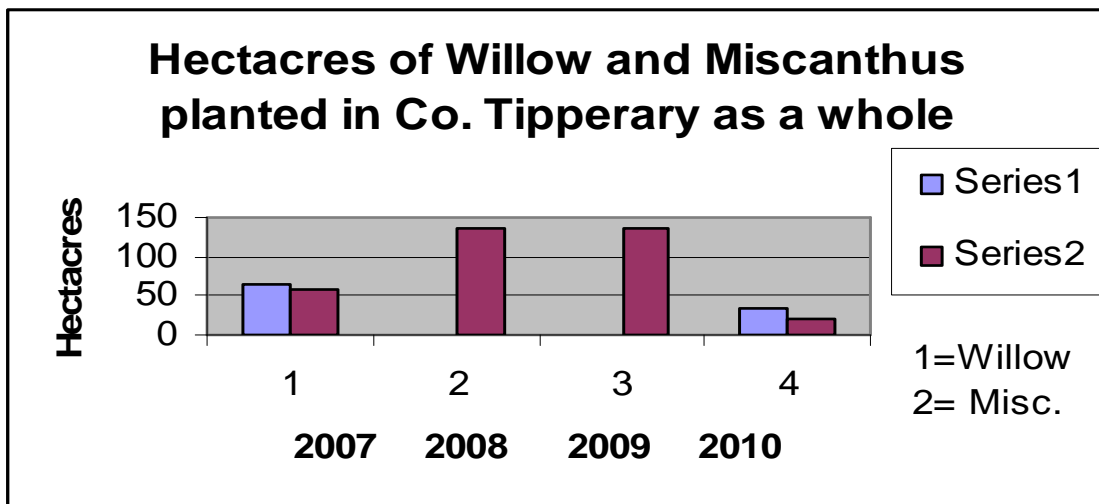
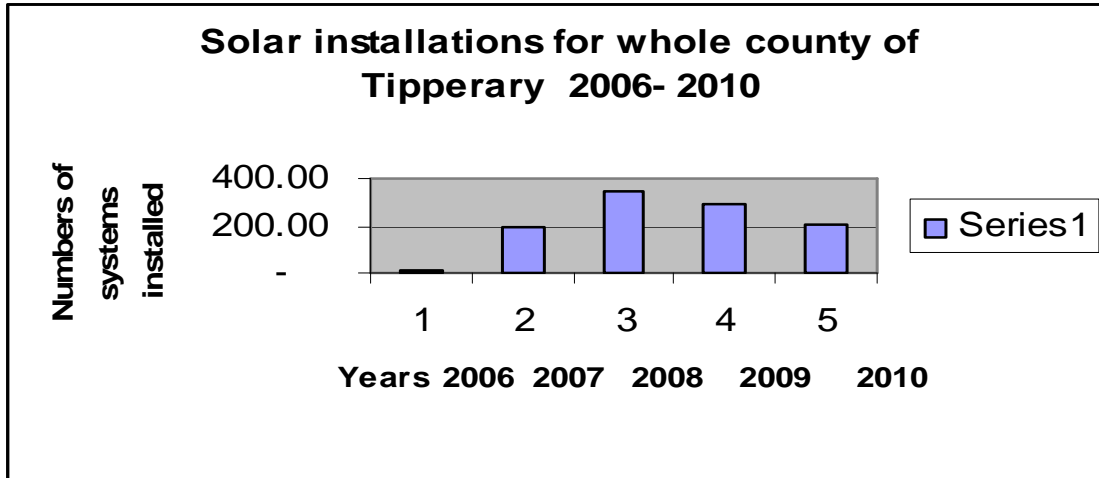
In 2009 there were no major renewable energy investments in the county. There have been sizable applications in 2009 (biogas and wind farm applications) but on the ground investment has yet to commence. A 100 megawatts wind project of c. 50 masts on three sites in the Hollyford Hills was due to start shortly, on completion of a substation for grid connection. Greenside Properties indicated that they would proceed with the gas-powered plant in Cahir in early 2010. A planning permission for a combined heat and power biomass system was granted for mushroom farm at Cloghleigh, Golden.

2010

- There was one single significant investment in renewables in 2010 in the county. Rockwell College installed two no. 240kW wood chip boilers, which TEA would expect to output 768,000kWh, depending on operating hours and management of the heat load at the college and associated buildings. This installation should result in local wood production supply chains, given the cost of transporting bulk timber. The company is Tipp Wood Chip of Two Mile Borris.
- There were no large wind farm installations in the county nor any bio-gas.
- Natural gas did come to Cahir bringing lower priced energy and is due to come to Tipperary town in 2011.
- There is no wood briquette or wood pellet manufacturer in the county though there are some close by.
- Miscanthus is being grown by a number of farmers in the county, organized by a local company, Tippgen. During the year, the tariff or subvention for biomass to electricity generation plants was announced, giving some degree of price predictability for growers.
- There is a good growth in solar heating installations in Co. Tipperary, north and south county as a whole though the numbers installed have dropped in recent years, perhaps an indication of less houses being built. By simple population figures, we can estimate that 55% of these might be in South Tipperary.
- Tipperary Energy Agency is starting to develop FOREST, a pan-European project focused on working with business in the biomass heating supply chain to develop a more profitable and successful business sector. Their aim is to keep you up-to-date with information that's helpful in developing business and promoting a successful biomass sector.

#### Planning

- 4 applications in 2010 re windfarms
- 1 for modification to application in Hollyford area
- 1 for modification to application in Turraheen area
- 1 for monitoring mast in Garracummer
- 1 for extension to wind farm in Ballinure area



**Business parks:**

At end 2009, five of thirteen business units in Clonmel Business Park were available for rent. 2009 data for other business parks is not available but 2010 data is being collected.

**Business Parks in South Tipperary, occupancy of units**

	2009	2010
Clonmel B. Park	7 of 13	11 of 13
Drangan	0	3 of 3
Ballingarry	3 of 3	3 of 3
Tipperary Technology Park	80% at end of 09	60-65% at end of 2010

**Decentralisation (Tipperary Town): Building**

No capital expenditure in 2009 but rent of c. €257,000 is being paid annually.

Land cost €750,000

In 2010 construction work started. Total cost of construction (both Town Council and Dept. of Justice building) to be €19,919774.

### **Slieve Ardagh:**

Key areas that have been progressed in 2009 –

- the development of the lake as a fishing resource is being continued,
- three literary events were held,
- usage of the IT facilities in the Library in Killenaule has increased.
- Research work on the O Tunney school is continuing.
- The Development officer proposes to lengthen her input by working a shorter number of hours per week.
- A review meeting with both the community and agency representatives took place to review the original aims of the initiative, set new aims and see what the most appropriate structures are for the achievement of these aims.
- A new plan was agreed.

In 2010

- A book and calendar re: Kilcooley Abbey were published
- The plan by the community was submitted to the County Tipperary Development Company for funding as three projects
  - An ecclesiastical heritage trail
  - A bio-diversity and angling project
  - Maximizing walks and associated facilities (accommodation, music etc) project
- The Library continues to be well used
- Work on refurbishing the old schoolhouse in the Commons started to create a multi-purpose space to include a display on the mining history of the area
- A map of the Cabragh wetlands had been prepared

### **Town centres: major shops opening and investments**

2009

Showgrounds shopping centre, Clonmel, 11, 000 m2 (118,403 square feet) including Marks and Spencers shop of 2137 m2, 23,000 square feet.

Menarys, Clonmel town centre, October, 15000 square feet

2010

DV8 opened Clonmel town centre, 5000 square feet.

River Island, Clonmel town centre, 642.4 m2

Aldi, Cahir, 1210 m2

### **Rates**

An Entry Year Property Levy invoice is issued to businesses which are newly erected or newly constructed in a particular year. These are from the county area only.

2009 – 20 levies were issued  
 2010 – 25 levies were issued

**Innovation Vouchers**

Approved 2007: 12 (€60,000)  
 Approved 2008: 08 (€40,000)  
 Approved 2009: 18 (€90,000)  
 Approved 2010: 13 (€65,000)

A total of 51 (€255,000) vouchers have been approved to companies in South Tipperary 2007-2010. Twenty-five have been used and paid out. Some are still active and some have not proceeded. Of the 25 the bulk went to WIT, the leading knowledge provider in the state, others to a number of institutions which include TI (7), Teagasc (5), UCC (2) and Carlow (2).

**Goods Vehicles**

The number of vehicles licensed in the Tipperary South Area as a 'Goods Vehicle' is as follows ;

2009 New 129 , Imported 249  
 2010 New 178 , Imported 115

**Water/Wastewater:**

Total spend in 2009: €4,502,103  
 Total spend in 2010: €9,025,978

The increase in 2010 was due to the construction of the sludge dryer in Clonmel.

**Ballingarrane**

2009 A consultant has been employed to create a brochure. An agreement on a tenant for a 4 acre site there is expected in the first half of 2010.

2010 A new brochure and website were launched during the year. The site is now on the IDA website and a number of meetings took place with the IDA to promote the park. A promotional video is in preparation.

**Investment in District Service Centres and Approach Roads**

District Service Centres	€ Investment in 2009	€ Investment in 2010
Cahir (Ardfinnan)	100,566.72	
Cashel	0	
Fethard (Carrick)	100,000	
Tipperary	30,000	
Clonmel	17784	
Emly		1,500
Ballyporeen		45,663
Ballyclerihan		26,533
Clonmel Town		47,319

Kilsheelan		45,172
Approach Roads Tipperary town		3213.
Approach Roads, Bانشا		11,876
A. Roads Lisvermane		23,145.
A. Roads, Cashel town		28,991
A. Roads, Dundrum		24,774
A Roads, Rosegreen		81,762
totals	248,350	339,948

### Food investment CD Company

2009

STDC allocated grants to the value of €171,162 to the food sector in 2009 but only 1000 was paid out. The remainder is due for payment over the next few months. There is always a lag between commitment and payment

2010 food investment was as follows

Diversification into non-agricultural activities	27,23
Support for business creation and development	171269
Encouragement of tourism activities	-
Basic services for the economy and rural pop.	9,62
Village renewal and development	-
Conservation and upgrade of rural heritage	-
Training and Development	
Cooperation projects (on a project by project basis, most likely a 50% EMPG and 50% Tourism)	11298
Skills acquisition and animation	-
Administration Budget	

### Scheme of Capital Grants for Recreational and Community Facilities and Amenities:

Total grants paid out in 2009, €1,802,338

Total grants paid out in 2010, € 830,182

### LEADER investment in the county, 2009

(Monies paid out in 2009. There are significantly higher commitments, but these will be caught in next year's payments)

So as to have no potential overlap, I will be including the tourism figure in the tourism part of the economic template, so there is no need for you to also include it.

- EMPG total spend for 2009 - €59,037
- Tourism total spend for 2009 - €68,449

- (included in the tourism part of economic template)
- LA21 PMG total spend for 2009 - €149,184.
  - CPMG total spend for 2009 - €69,100

These figures came from (please note that the figure for food given above are included in these figures)

		<b>2009</b>	<b>2010</b>	<b>2009+2010</b>
Diversification into non-agricultural activities	EPMG	€2,027	48432	50459
Support for business creation and development	EPMG	€1,713	205025	206738
Encouragement of tourism activities	Tourism	€13,152	47855	61007
Basic services for the economy and rural pop.	LA21 PMG	€66,959	358916	425875
Village renewal and development	LA21PMG	€0	10472	10472
Conservation and upgrade of rural heritage	CPMG	€13,803	48513	62316
Training and Development	LA21 PMG	€600	108895	109495
Cooperation projects (on a project by project basis, most likely a 50% EMPG and 50% Tourism)		€0	11298	11298
Skills acquisition and animation	LA21PMg	€26,328		
Administration Budget	Each to EPMG, Tourism, LA21 and CPMG	25%, €221,189		

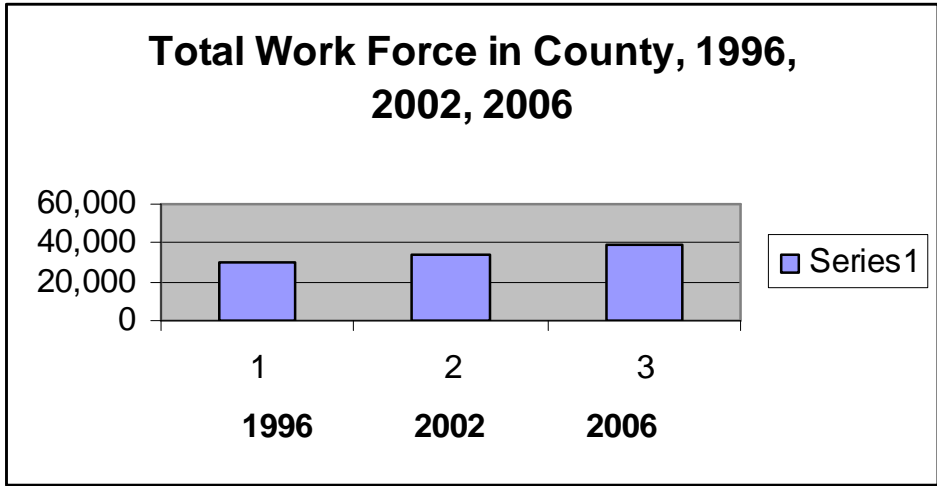
## **Result area 2: Provide a Skilled Workforce**

### **Indicator 3 Jobs Profile of County**

**Baseline:** 1996 and 2006 Censuses (as per below)

#### **Total Work Force in County**

1996	2002	2006
29,965	34,157	38,651

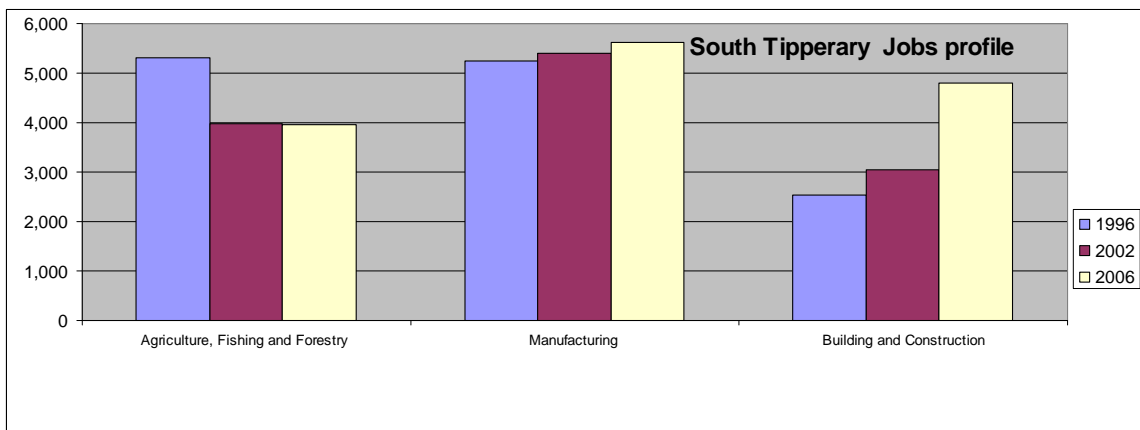


### Numbers in employment

#### Commentary

In 1996 there were 29,965 employed in the county and in 2002 there were 34,157. This rose to 38,687 by the census of 2006. There are no county level figures since then (until the next census) though it should be noted that the Live Register figure in the county rose from 3297 to 8514 at the end of 2009 and 9453 at the end of 2010. We do not know however how many new jobs were created during that time so it would be incorrect to simply assume that the number employed had dropped by the increased Live Register figure. Given the economic situation generally however, we can assume losses in several sectors such as construction.

### Jobs Profile<sup>6</sup>

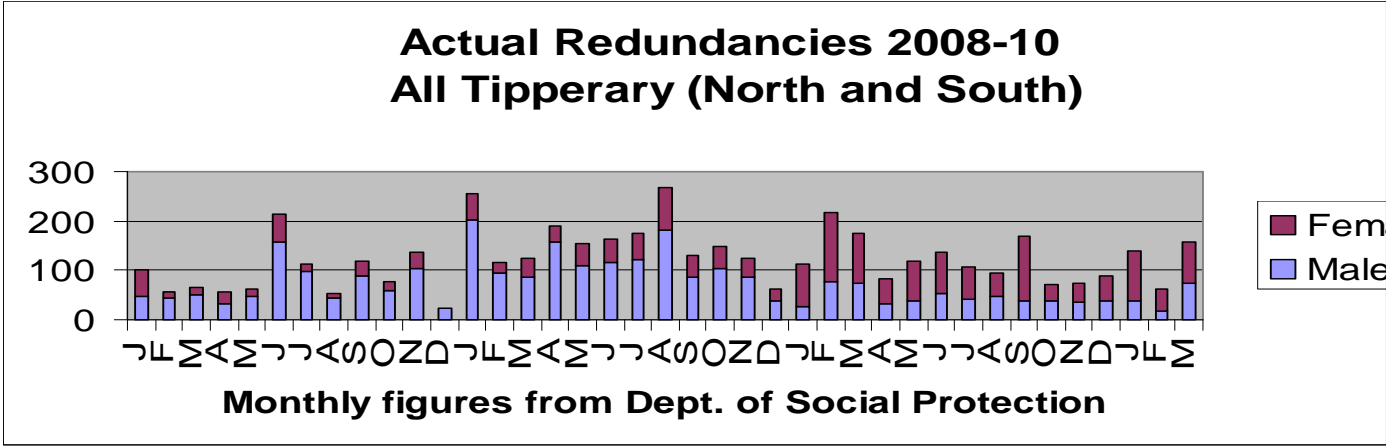


<sup>6</sup> CSO Censuses 1996, 2002, 2006.

## Occupation Groups<sup>7</sup>

<b>Table 3.1: Occupation Group</b>				
	<b>2002</b>	<b>2006</b>	<b>% Change</b>	<b>% Total Employment 2006</b>
Agriculture, Forestry and Fishing	4,006	3,926	-2.0	10.9
Mining Quarrying and Turf Production	179	244	+36.3	
Manufacturing Industry	5,539	5,628	+1.6	15.7
Electricity Gas and Water Supply	141	148	+5.0	
Construction	3,249	4,789	+47.4	13.2
Wholesale and Retail Trade	4,186	4,740	+13.2	13.7
Hotels and Restaurants	1,428	1,631	+14.2	4.5
Transport Storage and Communications	1,228	1,268	+3.2	
Banking and Financial Services	695	726	+4.4	2.0
Real Estate, Renting and Business Activities	1,550	1,746	+12.6	
Public Administration and Defence	1,482	1,506	+1.6	4.2
Education	1,960	2,273	+15.9	6.4
Health and Social Work	2,740	3,796	+38.5	10.6
Other Community, Social and Personal Services Activities	1,196	1,621	+35.5	
Industry Not Stated	1,757	1,750	-0.4	-
<b>Totals</b>		<b>35,792</b>		

<sup>7</sup> South Tipperary Innovation and Enterprise Strategy 2010



**Commentary**

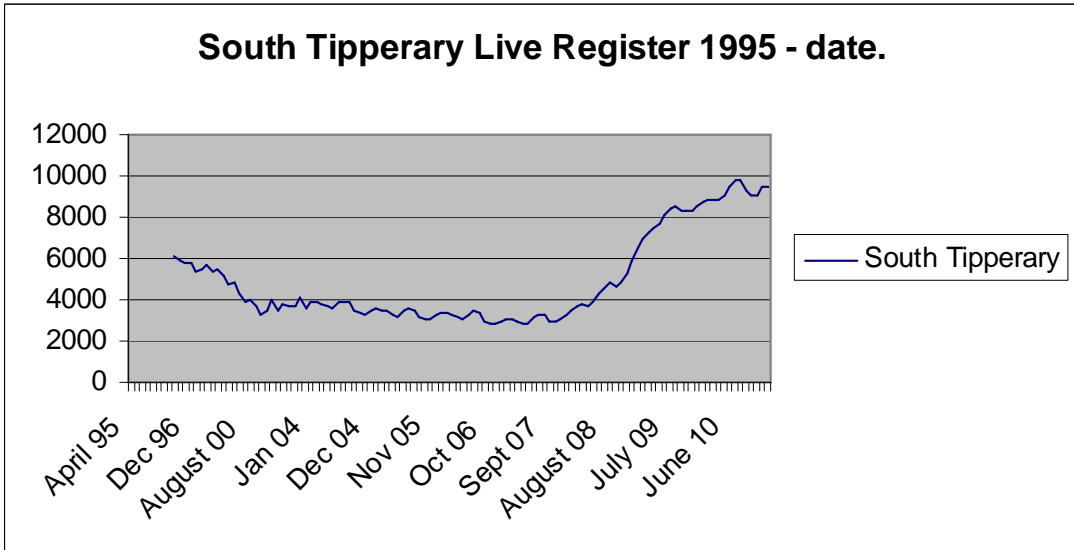
There may be a moderation of notified redundancies in 2010 compared to the previous year in that most months' totals are below 100 in contrast to the previous year when most are above.

**3.6 Future Economic Priorities 2009-2012**

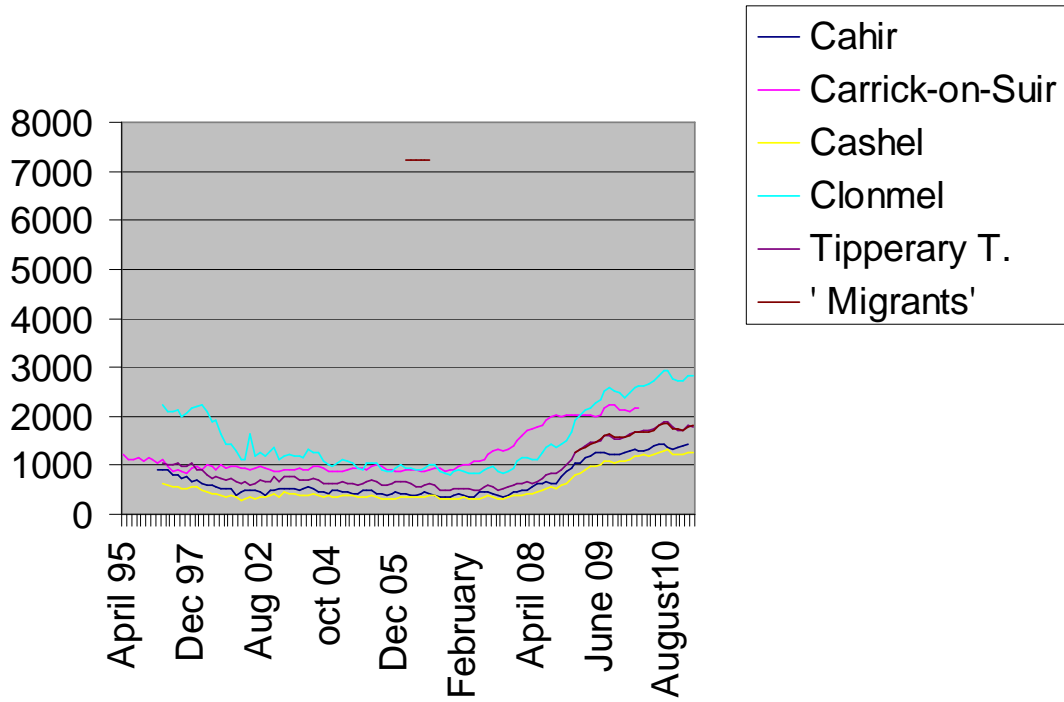
Baseline: Live Register figures

December 1999 4,318 (CSO)  
 December 2008 5,870 (CSO)

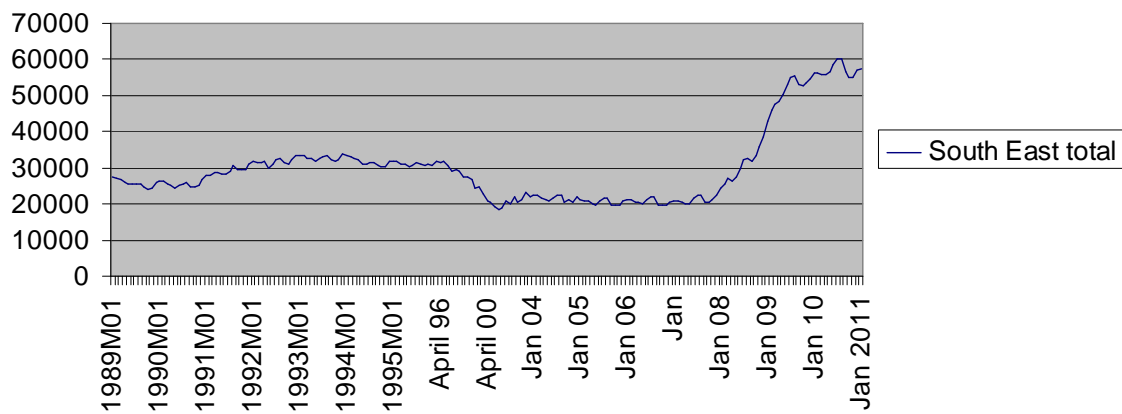
**Employment and Unemployment**

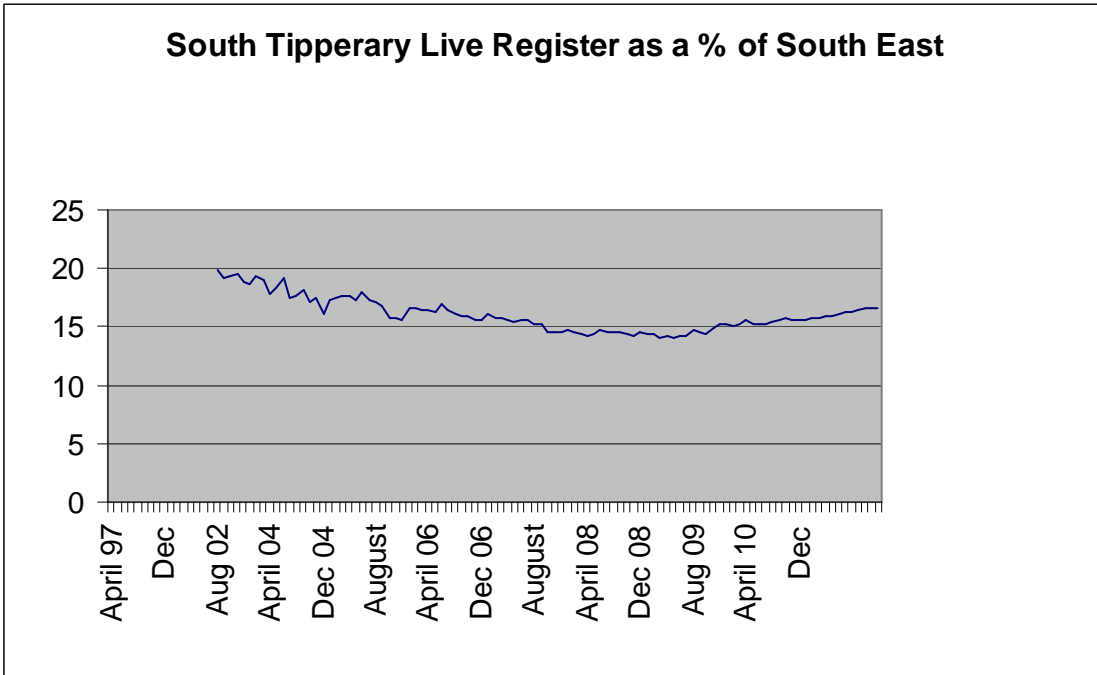


### South Tipperary Area Live Register 1995 - date



### South East total Live Register



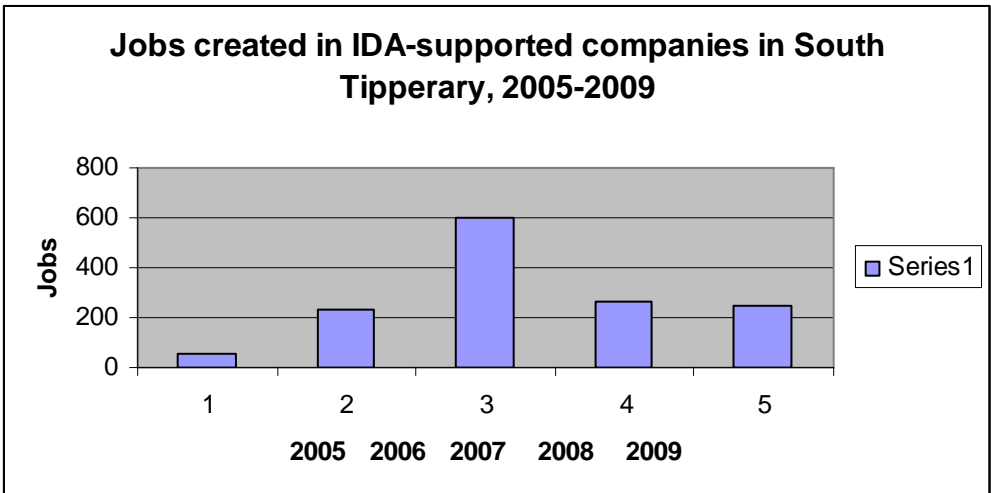


**Commentary**

We are moving further away from the Strategy baseline of 4318 in December 1999, and the late 2006 lowest point of c. 2820 as the Live Register figures come close to 10,000 in late 2010.

Live Register figures in South Tipperary continue to inch back up from 15% of the total in the South-East in 2008 to 17% at year's end.

**Job Creation in the County.**



Result area 2: Provide a Skilled Workforce for Current and Future Jobs  
Baseline: agreed database to be established

### **Upskilling actions in 2009**

Target: FAS 20,000 clients or 10.4 million

Total upskilling actions in 2009: 21, 051, 366.

Total upskilling actions in 2010: 20, 184,989 (agencies involved: VEC, FAS, Spafield FRC, Tipperary Institute, Mens Network, Suir CDP, Three Drives FRC, Traveller CDP, Youth Service, Knockanrawley RC, CDC (LEADER)..

### **Equine Employment in South Tipperary (Teagasc)**

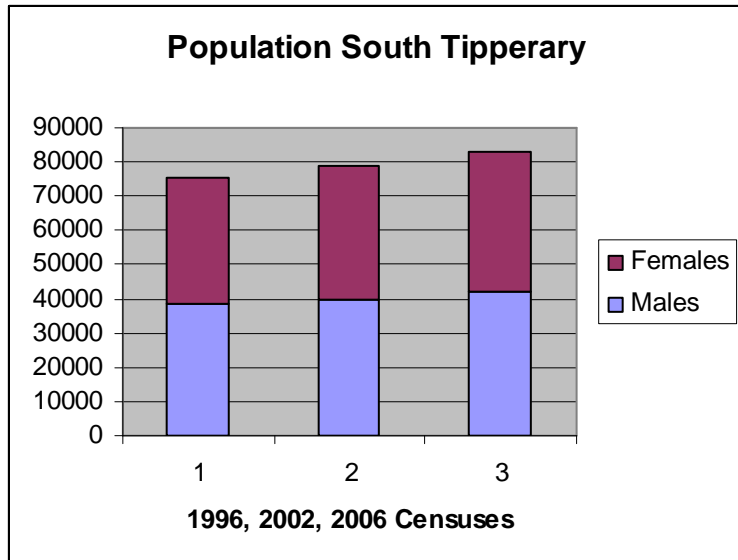
Target: Human Capital investment of €237,000

Data requested

### **General Demographics**

#### **Population of the County:**

Population	1996	2002	2006
Males	38312	39999	42250
Females	37202	39122	40971
total	75514	79121	83221

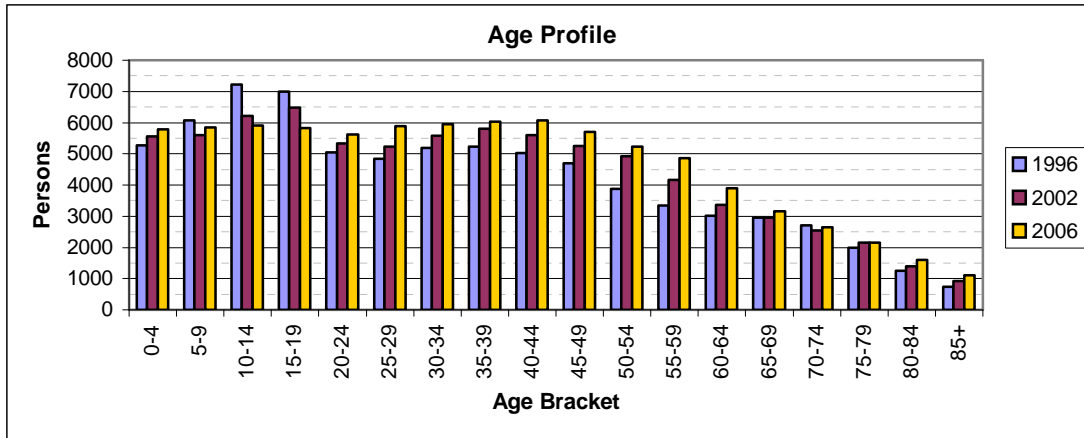


In inter-censal years (i.e 2007, 2008, 2009) CSO only publishes national and regional data. In April 2009, nationally emigration had increased, with first EU 12 citizens and then Irish citizens being the two main groups. Immigration had declined and overall there was a return to a small outward migration. Births had increased substantially so that overall the population had increased by 0.8% to a total of 4.46 million people.

How will South Tipperary have been affected in particular? It is not possible to be anything more than tentative but it seems likely that the county will follow general national trends and see outward migration, or re-migration, of both native and migrant population groups. How will that balance against births and deaths? The next definitive data will be from the April 10<sup>th</sup>, 2011 census whose results should become available the following year.

## Age Profile of County<sup>8</sup>

<sup>8</sup> South Tipperary Innovation and Enterprise Strategy 2010.

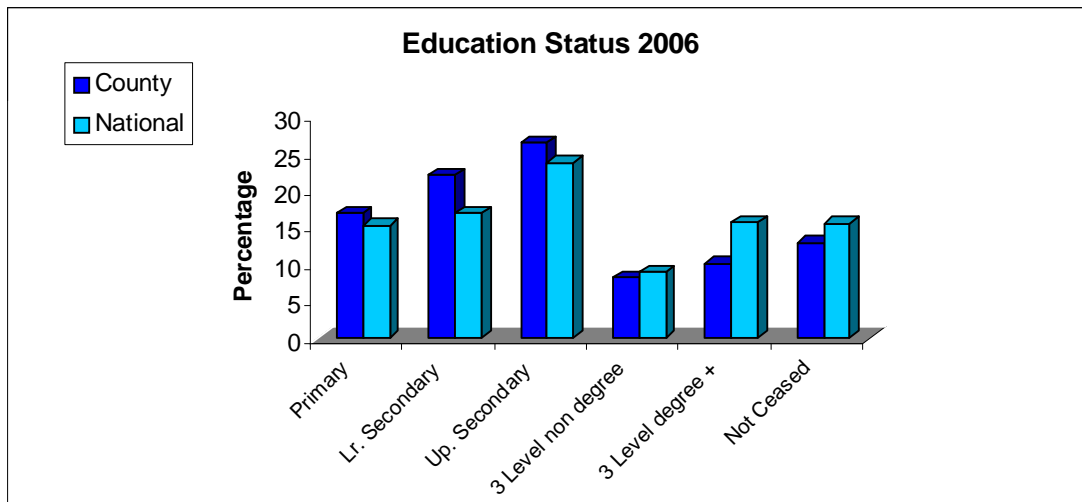


**Figure 3.1: Age Profile 1996-2006**

Analysis of the population structure relative to age profile illustrates:

- The population numbers in the younger age cohorts 10-19 is larger proportionate to other age group, and when projected forward to 2020 and beyond, provides a positive indication for an available young workforce, provided this population potential is retained within the County.
- The decline in overall population numbers in the age cohorts of the 10-19 & 20 – 24 group. It would appear that the cohort of University age/First job seeking age, are being lost to the county and this is an issue that requires some consideration.
- All other age cohorts increased over the period 1996 – 2006.
- a growing proportion of the population fall into the “ageing category of 50 – 65+” and an increasing ageing population (relative to the younger cohorts) is of some concern for future economic growth and in particular support for our “ageing” population.

### Education Status



## Youth

### (extract from recent report 'Young People in South Tipperary: A Demographic Profile' based on 2006 Census)

The proportion of young people as part of the overall population in South Tipperary is higher than the national average.

- The actual number of young people in the county is comparatively low by national standards.
- The proportion of young people in South Tipperary's urban centres is notably below the county average.
- Almost 30 per cent of young people enumerated in the county live in (19.3 per cent) or just outside (10.6 per cent) Clonmel.
- 44 per cent of young people live in rural areas; 18.3 per cent live in rural electoral divisions bordering the urban centres and 37.7 per cent live in the five towns.
- The number and proportion of young people in South Tipperary has decreased between 2002 and 2006, while the overall population has grown.
- There is a strong migratory trend out of the county among 17 to 22 year olds.
- It is expected that the youth population will increase by up to 9 per cent by 2021.
- However, the proportion of young people as part of the overall population will decrease as life expectancy continues to increase.
- Less than 2 per cent of young people under 25 have only completed primary level education.
- Almost 13 per cent of young people under the age of 25 leave school before completion of upper second level.
- Males are at twice the risk of leaving school early compared to females. Young men between the ages of 15 and 17 are four times more likely to leave school early.
- There would appear to be a positive trend in respect of early school leaving with the number of early school leavers decreasing with age in the group of 15 to 24 year olds.
- Up to 39 per cent of children (0 - 18 years) may be at risk of poverty as they grow up in one-parent families or in families of four or more children.
- Approximately 1/5th of young people are classified as unskilled or semi-skilled or live in a household, whose head of the family falls into this category.
- Approximately 1 per cent of annual births are to mothers under the age of 18.
- Births to mothers under the age of 20 in South Tipperary fell by 28 per cent to 37 in 2006.
- Almost 85 per cent of children born to mothers aged under 25 are born out of wedlock, compared to 36 per cent in all age groups.
- Between 2.5 and 5 per cent of young people have a disability.
- Almost 2 per cent of 15 to 24 year olds act as carers, most of whom are caring between 1 and 14 hours per week.
- Less than 1 per cent of the population aged 10 to 24 years is a member of the Travelling community.
- There is a general downward trend in the number of young people on the Live Register for the period 2004 – 2006, with males being more likely than females to be in need of Jobseeker's payments.
- Latest figures suggest an increase in the proportion of young people on the Live Register by over 4 per cent.
- 79 persons aged 10 to 21 years in South Tipperary received treatment for drug or alcohol misuse in 2007.
- Drug treatment data would suggest that males are at a higher risk of drug and alcohol misuse.
- There is an indication that drug misuse in comparison to alcohol misuse is more pronounced in the county than elsewhere.
- Unemployment and low educational attainment are characteristic for many young people treated for alcohol and drug misuse

## General Business

## Tourism Revenue

Result area 3 Increase the Economic Performance of Targeted Sectors and Grow Entrepreneurship

Indicator 1: Tourism investment in the county

Baseline Investment of €400,000 (2005-8)

Increase of number of hotel bednights, baseline to be established.

Targets:

Tourism €400,000

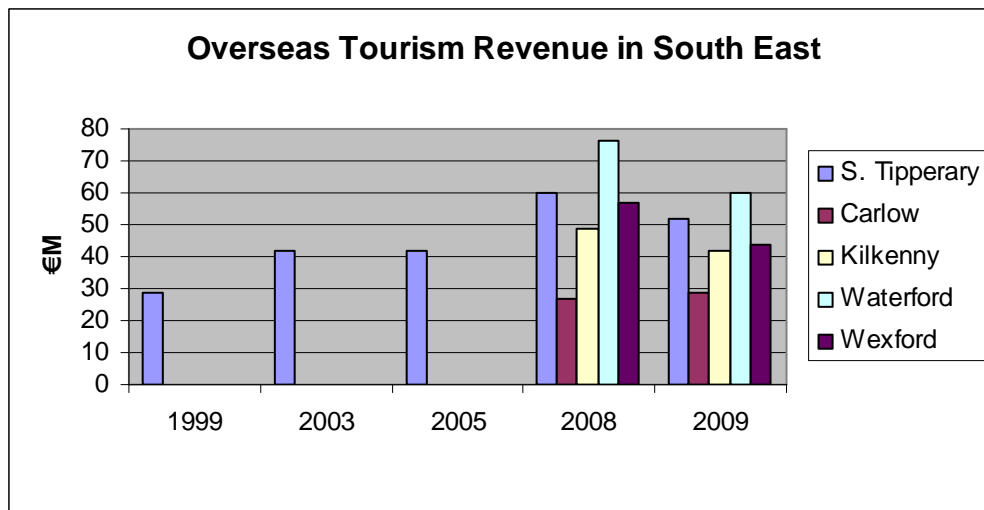
Food €50,000

Engineering Sector €30,000

Equine sector €25,000

County Enterprise Creation €400,000

Region, Enterprise creation: €225,000



Aideen Kelly [Aideen.Kelly@failteireland.ie] has reported that the 2010 data 'should be available in the next few months'

## Indicator 2 Entrepreneurship Growth

Baseline : to be developed around growth in number of R&D investments.

The County Data unit may succeed in creating an index of entrepreneurship.

### Enterprise creation

The Gem Report on Entrepreneurship in 2008 shows that the region generates the highest rate of early stage entrepreneurship of all the regions in Ireland. However the trend has been for businesses to remain very small and to trade locally. The relatively low level of HPSUs emerging from the region reflects this pattern. The extremely high rate of early stage entrepreneurial activity among men in the region (15.5%) is the highest rate across all regions. Men in the region are two and a half more likely to be early stage entrepreneurs than are women. The proportion of individuals in the region, however, that aspire to start a new business (10.7%) is more at the average for the regions (11.0%). It is estimated (based on limited survey) that 450 individuals are setting up new businesses in the South-East region every month. This number is second only to the Dublin region.

## General Commentary

The South East is deficient comparatively in

- Incomes
- Relatively low labour force participation
- Poor educational attainment
- Heavy concentration on manufacturing & agriculture

### From Regional Competitiveness Agendas, Overview Findings and Actions, Forfas Report, 2010

#### The South-East

Comprising of counties Carlow, Kilkenny, South Tipperary, Waterford and Wexford, the South-East region has a total population of 496,500. The region has a distinctive settlement pattern with five relatively large centres of population distributed across it, and a gateway that has demonstrated limited impact to date. This has resulted in diverging and competitive dynamics within the region, but also presents an opportunity to work with this distinctive diversity through a more coordinated regional approach. In reality the northern parts of the region are more naturally 'drawn' towards Dublin. Historically the region had a strong heavy industry profile, and although there have been developments in recent years the transition to a more knowledge intensive enterprise profile has been relatively slow.

#### Key Data and Statistics – South-East

	South East	State Average	Dublin
Unemployment (Q4, 2009)	11.4%	10.2%	8.9%
Employment Growth 1998-2008	40%	33%	22%
GVA per worker (productivity)	€57,864	€76,799	€103,104

<b>GVA per person</b>	€26,735	€36,606	€51,596
<b>Educational Attainment 3rd level</b>	23%	29.1%	35.9%
<b>HERD % of national total</b>	1.6%	100%	50.0%
<b>BERD % of national total</b>	4.4%	100%	41.8%
<b>Agricultural Employment</b>	9%	6%	2%
<b>Manufacturing Employment</b>	17%	14%	11%

47 CSO *Population & Migration Estimates*, April 2009

## **FORFÁS REGIONAL COMPETITIVENESS AGENDAS: OVERVIEW, FINDINGS & ACTIONS**

### **Key points of interest and potential**

The absence of a university within the region has been cited by regional stakeholders as a significant deficit and a formal application by WIT for upgrade to university status is currently with government

The region has benefited from a strong international brands through the promotion of Waterford Crystal, Kilkenny Medieval City and Wexford Opera Agency supported sectors that experienced the most significant growth in the region over the last decade included pharmachem, medical technologies and ICT services industries. These growth sectors are dominated by foreign-owned firms Contributing 9% to overall employment, the agricultural sector remains a significant part of the South-East economy. Strong international players in the food processing industry provide a solid platform for future growth

Although the performance of the region in terms of entrepreneurship has been comparatively low, regionally based initiatives such as the *Spirit of Enterprise* demonstrate local capacity and capability to stimulate a collaborative and regional approach to the development of indigenous enterprise

The small portion of the total R&D spend in the higher education sector (HERD) underlines the importance of establishing linkages and networks, including with relevant HEIs and research institutes beyond the region (nationally and internationally).

Significant developments such as the awarding of an SFI Strategic Research Cluster to WIT/TSSG (the first of the ITs to establish such a cluster) represent a key step in enhancing one aspect of research and innovative capacity within the region.

### **Key Actions (Extract)**

The enterprise development focussed *Spirit of Enterprise Forum* is an initiative that has brought together the relevant stakeholders over the past 3 years, and has had some success in developing a regional rather than county focus. This forum has the potential to provide leadership and a cohesive approach to enterprise development throughout the region – although the role and engagement of the agencies in this context should be clarified

A cross-regional Gateway Implementation Group should be established to garner proactive support for the gateway and to accelerate its strategic development, in terms of enterprise potential, infrastructures and the built

environment . Recognising the resources of potential entrepreneurs from the farming community, and given the business opportunities that are arising in the agri-business/environmental sectors, ensure optimal co-ordination of supports from relevant agencies such as Teagasc, EI, LEADER and the CEBs Including the development agencies, WIT, chambers of commerce, business representatives etc. See <http://www.spiritofenterprise.ie>

## FORFÁS REGIONAL COMPETITIVENESS AGENDAS : OVERVIEW, FINDINGS & ACTIONS

### **Priority Infrastructures – South-East**

#### **Roads**

N11 (Arklow/Rathnew; Enniscorthy By-pass)

N25 New Ross Bypass

N24 Upgrade Limerick-Waterford

**Waste Water** Address Waste Water capacity deficits in Wexford

**Broadband** Extension of Waterford MAN

Dublin and the Mid-East (the East)

#### **Points of Interest**

densely populated region in Ireland.

longer distance commuting to Dublin City

### **From Regional Competitiveness Agenda, Volume 11-Realising Potential South-East Forfas 2009**

**Enterprise Dynamic** assessing the enterprise structure, employment and GVA, the contribution from agency supported enterprises, and sectoral diversity and/or clustering

**Skills & Education** an analysis of the skills, educational attainment and education resources

**Innovation** research and development investment and activity, collaborations and interlinkages between HEIs and firms, between firms and customers

#### **Economic Infrastructures**

transport and broadband infrastructures – recent investments and ongoing infrastructure needs

**Quality of Life** based on factors relevant to the attraction of mobile investment and labour/talent

#### **Leadership and Strategic Capacity**

outlining relevant organisations and indications of locally driven initiatives and outcomes

Age cohort analysis shows that almost one fifth of the region's young adult population (aged 15-19) migrates from the region as they pass from late teens to early twenties p 5  
The impact of the fall in construction may have a greater overall impact than in other parts of the country 6.

The agricultural sector contributes 9% in over all employment, greater than the national average of 6%, complemented by the employment provided by strong international food processing companies.

The region continues to exhibit a relatively high level of early school leaving (below Leaving Cert) and relatively lower levels of attainment to third level.

The south-east accounts for a very small portion of the total R&D spend in the higher education sector (HERD) (under 2% in 2006) 7.

**Infrastructure: issues remaining to be addressed:**

The east west links from Waterford to Limerick by road

Existing but under-used rail transport infrastructure

Key investments in electricity infrastructure

Broadband service

A more co-ordinated approach to regional development is required.

The South-East Region has more people without a Leaving Certificate qualification than almost any other region in the country (with the exception of the Border) and one of the lowest levels of third level attainment in the country. Upskilling and reskilling will be vital.