

InCarlow Economic Development & Business Support Strategy 2022-2027



Oifig Fiontair Áitiúil
Local Enterprise Office

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Foreword



Foreword

Since the rolling of the capstone onto the Brownhill Dolmen, County Carlow has been a unique location in Ireland where people of ambition, innovation and success call home. From our industrial history the County has built a strong entrepreneurial spirit as evidenced by the vast number of enterprises based in County Carlow, our strong indigenous companies and the international companies who call County Carlow Home.

The inCarlow Economic Development & Business Support Strategy 2022-2027 has been created to demonstrate how collectively we can develop County Carlow's economy, through an extensive programme of activities intended to stimulate and support local growth. Our ambition is to see County Carlow become the leading county in Ireland with a distinct economic identity that sits alongside high levels of business growth and prosperity. This will be achieved by the coming together of agencies and industry to develop a series of new and unique activities which generate economic development and business support in the County.

As a county we have a fast growing and distinctively young population together with an experienced workforce with deep skills across a wide range of sectors. It is important that we plan ahead so that our youth have the skills and knowledge to take our county to the next level of innovation as they become the workforce of the future. Equally important is that we nourish and harness our entrepreneurial spirit so that it is translated into jobs that support our economy and quality of life and that help to address the outbound commute that faces our residents each day. We believe this strategy offers the opportunity to do just that by providing a roadmap for economic growth up to 2027.

The strategy does this by identifying sectoral opportunities to expand the economic base of the county, focusing on research and development, as well as areas where we have the potential to be more competitive.

Carlow County Council is setting the pace as the leader of economic development at local level with this strategy and the architecture has been put in place to ensure effective delivery. This includes our Economic Development, Special Project Development & Local Enterprise Support Team who are there to champion and lead the delivery of ongoing support. While we as a Local Authority have a role to play, Carlow like all counties is a jigsaw of agencies and stakeholders who have all come together to develop this shared vision.

The core focus of this strategy is recovering and growing sustainably to achieve a vibrant county with revitalised towns and villages that creates economic opportunities to enable people and business to thrive. We thank all involved in this strategy development and look forward to playing our part as a Local Authority in its delivery.



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1. Introduction



1. Introduction

Carlow County Council seeks to enhance the quality of life in County Carlow for present and future generations through the provision of a broad range of services to a community of over 57,000 people across a geographical area of 346 square miles.

Carlow County Council plays a pivotal role in developing the county's economy through the provision of infrastructure, industrial promotion and support for community initiatives in areas of arts, culture and tourism. Carlow County Council fulfils this role in partnership with other local and national agencies that are directly responsible for employment creation, social services and economic development.

The economy has suffered a devastating downturn as a result of the Covid-19 pandemic, while also facing the changed trading context brought about by Brexit. There are many strengths the county can call on to drive economic recovery. County Carlow has a highly educated workforce, two Institutions of Higher Education, substantial infrastructural developments, and proximity to both Dublin and the major transport hubs, all of which present County Carlow as an ideal location for business. The county's challenges and opportunities are recognised – towns and villages require support to maintain their viability, businesses need appropriate space to enable their growth ambitions, and the climate challenge will require significant changes to how our economy functions.

Carlow County Council has a responsibility not only to respond to the needs of the community but also to exercise leadership in achieving economic, social, cultural and environmental development.

This strategy has been commissioned from Grant Thornton to profile the economic structure of the county, identify economic opportunities and propose a range of actions that will drive economic recovery and sustainable growth. The report covers:

- The Carlow Economy
- The broader context in terms of policy and findings from consultations
- Development & Recovery plan for the Carlow Economy

2. The Carlow Economy



2. The Carlow Economy

2.1 Introduction

Covid-19 has had a devastating and potentially long lasting impact on the global and national economy. An additional challenge has been Brexit, which continues to generate uncertainty despite the introduction of a Trade and Cooperation Agreement between the EU and UK. Understanding the impacts of both Covid-19 and Brexit, and key economic characteristics within the county, are important in helping shape the development of the actions proposed in the economic strategy. This section will provide a socio-economic overview of County Carlow and its Functional Economic Area. A more comprehensive socio-economic profile was prepared as a separate document in support of this economic strategy.

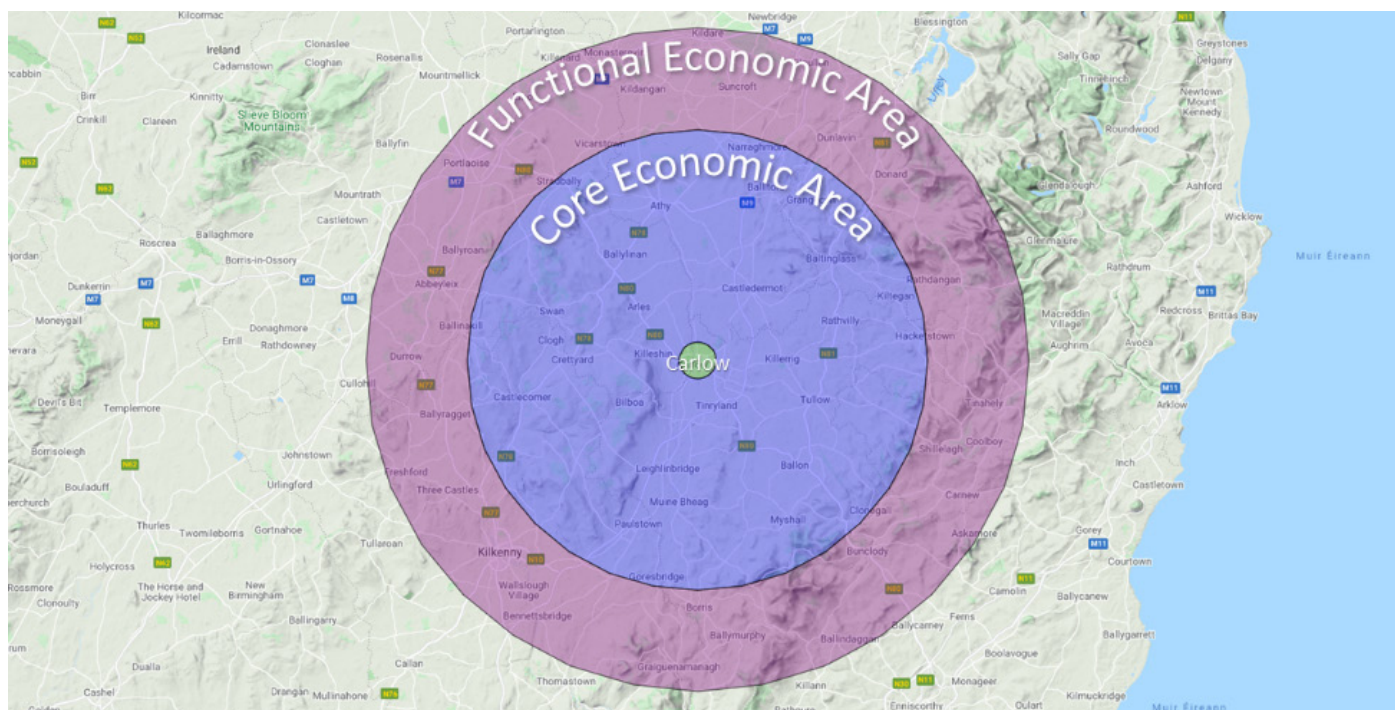
2.2 Defining Carlow's Economic Boundary

Carlow lies within the South-East region of Ireland and is Ireland's second smallest and third least populated county. The county is home to three EU designated Special Areas of Conservation – the River Barrow, the River Slaney and the Blackstairs Mountains. Carlow enjoys relatively easy access to Dublin with a drive time of approximately 1 hour and 20 minutes.

Carlow has two third level institutions, IT Carlow and Carlow College, highlighting Carlow's place as a student county. Indeed, IT Carlow's application to become a technological university has been successful and IT Carlow will merge with Waterford IT to become the Technological University of the South East.

In considering Carlow's economic geography, three areas have been defined – the County, an economic 'Core' based on a 30-minute drive from Carlow Town and a Functional Economic Area based on a 45-minute drive time from Carlow. The Core Economic Area (30-minute drive time) has been selected on the basis that the journey time to work, school or college for a quarter of Carlow's population is between 15 and 30 minutes. The Functional Economic Area (45-minute drive time) reflects the sphere of economic influence Carlow Town has across the wider region in jobs, education and other service provision. Aggregating Small Area Statistics within each boundary reveals that the Core and Functional Economic Areas have a population of 109,000 people and 254,000 people respectively (noting that the Functional Economic Area includes the Core Economic Area).

Figure 2.2.1: Core & Functional Economic Areas for Carlow



SOURCE: FREEMAPTOOLS – CONCENTRIC CIRCLES MAP

2.3 Economic overview of the county

County Carlow had a population of just under 57,000 in 2016¹ and ranks as one of the smallest counties in the country. With just under half (47.7%) of its population aged 34 years old and younger the county has a relatively young population. There is a particular concentration of people aged 25-34 years old (13.2%). The working age population (those aged 15-64) accounts for 64.9% of the total population.

Over a third (35.8%) of the population are in education, marginally higher than the national average (35.0%). Of those aged 15 and over, high educational attainment levels are also evident, with 21.0% qualified at a bachelor degree level or above. However, this was considerably lower than the national average (28.5%), alluding to a potential need for up-skilling and further educational strategies within the county.

Approximately half of Carlow’s 15+ population were categorised as at work in 2016. This was below the national average of 53.4% and may partly be explained by the higher than average unemployment (10.2%) and inactivity levels (28.5% excluding students). However, these figures have likely changed considerably since 2016, and particularly since the outbreak of the Covid-19 pandemic.

Of the workforce resident in Carlow, the 2016 census notes the industries of commerce and trade (23.0%), professional services (22.1%) and manufacturing (13.4%) were significant employers, accounting for 58.5% of total persons at work within the county. In particular, the professional service sector had a similar concentration to Dublin City (23.1%), indicating a potential priority sector for Carlow.

These socio-economic features distinguish Carlow as a county with a relatively young, educated population. The prevalence of employment within the industries noted underlines Carlow’s importance as a commercial, retail and manufacturing hub for the South-East region of Ireland and a potential professional services hub outside of the Capital.

- 
 - Population c.57,000
 - 64.9% are of working age
 - 47.7% aged below 35
- 
 - 35.8% of population still in education
 - 21% qualified at a bachelor degree level or above
- 
 - 50% employment rate
 - Unemployment of 10.2%
 - Inactivity levels of 28.5%
- 

Significant employers for residents:

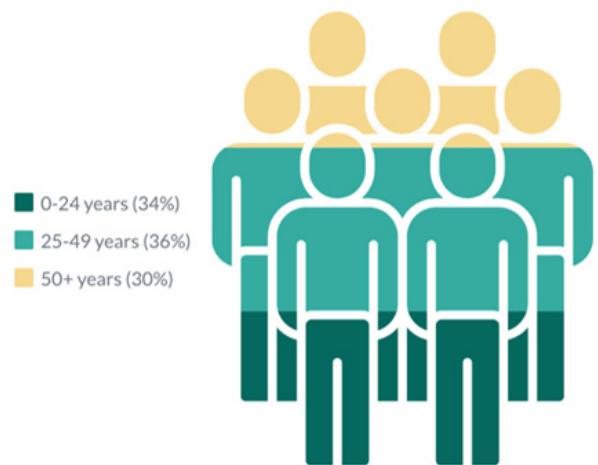
 - Commerce & Trade 23.0%
 - Professional Services 22.1%
 - Manufacturing 13.4%

¹Census 2016 remains the most recent data on regional population.

2.4 Population Profile

County Carlow has a population of 56,932. Carlow's Core Economic Area had a population of just under 109,000, slightly below 2011 levels.

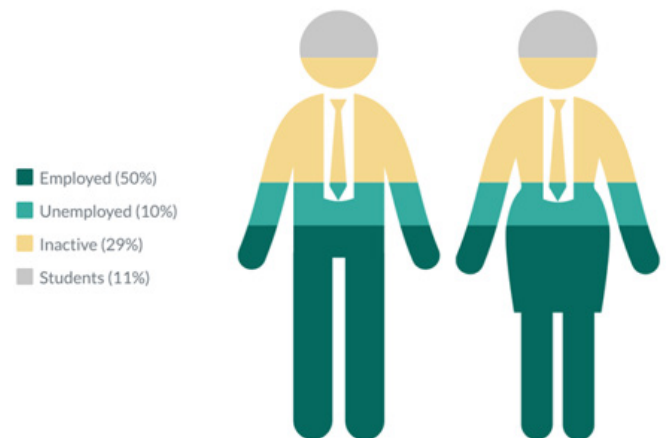
- County Carlow and the Carlow Functional Area each recorded population growth between 2011 and 2016 of 4.2% and 4.4% respectively. This growth outpaced the State's population growth (3.8%). In comparison, Carlow's Economic Area saw its population fall between Censuses by 0.4%.
- Approximately 29% of the population in the three Carlow economic geographies are aged 50 years and over, a lower proportion than the state average (30.4%).
- Ranging from 33.8% to 34.5%, Carlow's economic areas all have a lower concentration of 'younger people' compared to the state average (35.2%).
- The county has a higher proportion of children and teenagers compared to the state average – 28.6% vs. 27.5%.



2.5 Education & Skills Profile

Key skills characteristics across the county include:

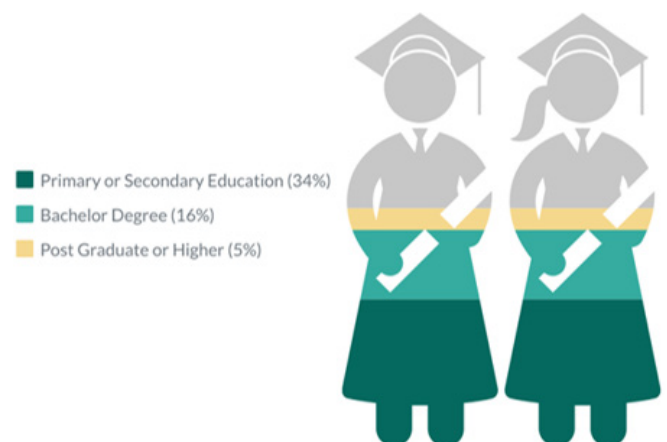
- 98% of the population aged 15 years and above across the Carlow Economic Area and Carlow's Functional Area have received some form of formal education.
- 47.3% of those aged 15 years and over in the county have only received primary or secondary education. This compares to only 43.8% at State level.
- Approximately 16% of those aged 15 and over hold a bachelor degree or equivalent in the Core Economic Area and Functional Economic Area. This reduces to 6.3% at a county wide level and compares to 18.4% at state level.



2.6 Labour Market & Business Context

Analysis of the 2011 and 2016 Census has identified the following key Labour Market observations about County Carlow and its Economic Areas:

- **Employment:** 59.74% of those aged 15 years and over in County Carlow are actively employed, looking for work or are unemployed. This compares to 61.4% at State level. It is estimated that 22,000 people in County Carlow are employed, representing 49.6% of those aged 15 years and over. In comparison, more than half of those aged 15 years and over across Carlow's Core Economic Area (50.6%), Carlow Functional Economic Area (52.0%) and the State (53.4%) are employed.
- **Unemployment:** 4,500 people are unemployed in the county, 10.2% of the 15+ population. Only 7.9% of the 15+ population across the State are considered 'Unemployed'.



- **Commuting:** Given Carlow’s relative proximity to Dublin, there is a relatively high level of commuting from Carlow to Dublin. Data from the 2016 Census and the Carlow Commuter Skills Study in 2018 suggest that 6,290 Carlow residents regularly commute out of the county for work, with 60% of these commuters aged between 25 and 45 with a third-level qualification/education. Dublin City plays ‘host’ for a significant proportion of Carlow’s Commuters (26%).
- **Sectoral Employment:** Commerce & Trade (23.0%), Professional Services (22.1%) and Manufacturing (13.4%) have been identified as key sectors to the County Carlow economy. Combined, these sectors employ around 13,000 people.
- **Business Demography:** There are approximately 2,850 active enterprises in the county, which represents just under 1% of total active enterprises across the State in 2018. These active enterprises supported 11,790 employee jobs. 95% of these active enterprises are SMEs. Construction (10.4%), Wholesale & Retail (9.3%) and Manufacturing (4.4%) are the most common sectors.

2.6 Carlow’s Priority Sectors

To identify opportunity sectors for Carlow’s economic growth, a ‘sector prioritisation’ exercise was undertaken which consisted of consultations, reviewing strategic documentation at national, regional and local level and an analysis of relevant data. The results of this exercise produced a range of opportunity sectors that have been categorised into one of three groups:

- **Focus and change:** These sectors are considered likely to support significant economic growth. These are sectors for which Carlow County Council should consider prioritising resource and effort.
- **Sustain and Grow:** These sectors are typically well established and continue to offer opportunities for growth.
- **Monitor and Intervene:** These are sectors which, while important to the local economy, may not produce sustained growth. As such, these sectors should be monitored on an on-going basis to ensure opportunities are taken potentially enhancing future growth potential.

	Sector	Rationale for this strategic priority
Focus and Step Change	Financial and Professional Services	These sectors align to the South East Development office as sectors of potential for the South East. In addition, these sectors were identified as key to the Carlow economy during the consultation phase.
	ICT	Each of these sectors have a unique connection to the Carlow Economy, e.g. Carlow has a long tradition of Engineering, with firms such as P.B. Machine Tech leading the way. Similarly, Financial Services and ICT have been making considerable contributions to the Carlow Economy, given their links to Dublin and the commuter belt. Companies such as Unum have strong links with IT Carlow through helping to shape the curriculum to ensure all students/graduates are ‘work ready’.
	Engineering	
	Technology Firms	Tourism was specifically highlighted as an area for particular focus. This sector is considered to be underdeveloped in the county and offers a route to drive greater economic activity across the whole county. Fáilte Ireland note a strong shift towards outdoor leisure since Covid, and Carlow is blessed with fantastic natural assets which can be further utilised to build on this trend.
	Tourism	
Sustain and Grow	Agri-Tourism	Consultees highlighted Carlow as an ‘untapped’ area of tourism potential, pointing towards the potential to avail of domestic tourism through short breaks. Additionally, given Carlow’s unique landscape and relatively high Agricultural employment concentration, Agri-tourism has been identified as a growth opportunity. This is aligned with the Programme for Government and has been highlighted as an area of potential and growth, with the council recently publishing their own Food & Drink Strategy ² . The consultation process also pointed towards Pharma as an area in which Carlow could create a cluster, building on the reputation and growth of MSD in recent years and developing local supply chains and local skills to support the firm and potential spin-offs. Carlow’s location and convenience to the M9, with ease of access to Dublin and other key locations present the opportunity to develop a distribution hub. In the context of ‘clean and green’ Carlow can develop itself as a net carbon zero distribution centre
	Pharma	
	Transportation	
Monitor and Intervene	Retail (Town Regeneration)	The retail sector is traditionally a market led sector, with much of the success being aligned with consumer confidence. The impact of Covid and the introduction of lockdown measures has impacted consumer confidence and thus retail across the country. The regeneration of town centres will be key to the ongoing viability of the sector locally.
	Green Energy ‘Retrofitting’	Analysis and consultation suggests the potential for Carlow to position itself as a leader in Green Energy.

² Carlow Food & drink Strategy; Carlow Local Enterprise Office (2019); <https://www.localenterprise.ie/Carlow/News/Food-and-Drink-Strategy-2020-to-2025.pdf>



3. The Broader Context



3. The Broader Context

3.1 Introduction

The Carlow economy does not function in isolation. Global factors, national and local policies all interact to set a broader context for how the Carlow economy performs. This section contains the strategic context that informs this Economic Strategy.

European Union Priorities

The EU has outlined 6 priorities for 2019-2024 as:

- **A European Green Deal:** Europe aims to be the first climate-neutral continent by becoming a modern, resource-efficient economy
- **A Europe fit for the digital age:** The EU's digital strategy will empower people with a new generation of technologies
- **An economy that works for people:** The EU must create a more attractive investment environment, and growth that creates quality jobs, especially for young people and small businesses
- **A stronger Europe in the world:** The EU will strengthen its voice in the world by championing multilateralism and a rules-based global order
- **Promoting our European way of life:** Europe must protect the rule of law if it is to stand up for justice and the EU's core values
- **A new push for European democracy:** Giving Europeans a bigger say and protect our democracy from external interference such as disinformation and online hate messages

The first three priorities have a significant bearing on local economic development and set the overarching context for Carlow's economic development efforts.

Project Ireland 2040

Project Ireland 2040 is Ireland's overarching strategy aims to deliver improved physical infrastructure and to support businesses and communities to realise their potential. Project 2040 is comprised of the National Planning Framework and the National Development Plan (NDP).

National Development Plan 2021-2030

NDP is the country's detailed public investment plan for the period to 2027 and underpins the implementation of the National Planning Framework. Updated in 2021, the NDP outlines a €165bn investment plan with a focus on solutions to strengthen housing, climate ambitions, transport, healthcare, jobs growth in every region and economic renewal for the decade ahead.

The National Planning Framework

The Project 2040 – Irish Planning framework has been developed to help shape future public and private investment, whilst promoting opportunities for all people and across all environment i.e. urban and rural.

The aim of this framework is to develop an economy and environment suitable to deal with how Ireland will be in 2040, focusing on the distribution of economic opportunities throughout the country. The NPF sets out a range of Strategic Outcomes which have influenced the development of this economic strategy.

Figure 3.1: The National Planning Framework: Outcomes



In addition to Project Ireland 2040, the Programme for Government and Covid Recovery Plans provide additional context within which Carlow’s economic strategy has been developed.

Programme for Government – Our Shared Future

The Programme for Government (PfG) sets out the policy basis for coalition government for the current Dáil term and is founded on ten core ‘missions’, a number of which are of direct relevance to Carlow’s future economic strategy. There is a strong emphasis on regional, and particularly rural, matters, with “balanced regional development at its heart because all parts of Ireland must thrive if we are to prosper as a country”. Key strands which are most relevant to Carlow include:

- **Regional Development:** The PfG explicitly recognises that “the State has a crucial role to play in achieving balanced regional development that benefits the entire country”, and in providing opportunities for citizens “regardless of where they live”. **Increasing remote, flexible and hub-working are priorities.** This is expected to alleviate pressures around work-life balances of Irish citizens, and reduce the necessity to commute to urban centres such as Dublin.
- **Town Centres First:** The PfG outlined the aim to introduce the ‘Town Centres First’ policy which prioritises the revitalisation of town centres across Ireland. The policy will involve the redevelopment of existing buildings and unused lands for new developments, promoting residential occupancy in rural towns and villages, by using the Collaborative Town Centre Health Check (CTCHC) to gather data and lead actions in determining need.
- **Greenways:** The PfG also outlined its commitment to the development and maintaining of greenways across Ireland, to provide a transformative model which improves overall air quality and public health, as well as being a key tourist attraction.
- **Tourism:** Covid-19 has had a devastating effect on the global tourism industry, with a report by the World Tourism Organisation estimating that between 100 and 120 million direct tourism jobs have been put

at ‘risk’³. Tourism’s recovery will take time and effort. PfG reflects a commitment to develop the sector further. In addition to further developing Ireland’s Ancient East, there is a commitment to develop ‘blueways’ and ‘greenways’, all of which can enhance Carlow’s tourism offer.

- **Broadband:** The PfG maintains the Government’s National Broadband Plan commitment to increase the level of connectivity throughout all regions and counties of Ireland⁴.
- **Housing:** Housing is a central element of the PfG, and the three Government parties intend to complete an audit of state lands, to identify land banks in public ownership that are suitable for housing and other purposes.
- **Education & Training:** Education, training, reskilling, and upskilling are common themes throughout the PfG, and are core elements of successful regional economic development. A Regional Technology and Clustering Programme to strengthen the links between SMEs, Educational Training Boards, multinational corporations and third-level educational institutions is proposed. This Programme is intended to assist in driving competitiveness, productivity, and innovation in the regions, and may be a suitable course for Carlow given its clustering in the FinTech and Engineering industries.

Our Rural Future – Rural Development Policy 2021-2025

Our Rural Future provides a framework for the development of rural Ireland over the next five years. The Government’s vision is for a rural Ireland that is thriving and is integral to national economic, social, cultural and environmental wellbeing and development. That vision is built on the talent, skills and creativity of people in rural communities; on the importance of vibrant and lived-in rural places; and on the potential to create quality jobs in rural areas and sustain our shared environment.

⁵ Tourism and Covid-19 – Unprecedented Economic Impacts; World Tourism Organisation (2020); <https://www.unwto.org/tourism-and-covid-19-unprecedented-economic-impacts>

⁴ National Broadband Plan, Government of Ireland (2020); [https://www.gov.ie/en/publication/c1b0c9-national-broadband-plan/#:~:text=The%20National%20Broadband%20Plan%20\(NBP,have%20no%20plans%20to%20invest.](https://www.gov.ie/en/publication/c1b0c9-national-broadband-plan/#:~:text=The%20National%20Broadband%20Plan%20(NBP,have%20no%20plans%20to%20invest.)

Our Rural Future focuses on the following thematic objectives:

- Optimising the opportunities for rural communities from high speed broadband
- Supporting improved quality employment and career opportunities in rural areas
- Assisting the regeneration, repopulation and development of rural towns and villages
- Enhancing the participation, leadership and resilience of rural communities
- Enhancing public services in rural areas
- Supporting a Just Transition to a climate neutral economy
- Supporting the sustainability of Agriculture, the Marine and Forestry
- Supporting the sustainability of our island and coastal communities
- Nurturing our culture and heritage

Delivering on the objectives set out in this policy will involve investment in remote working infrastructure to provide an opportunity for people to continue to live in rural communities while following their career ambitions. Investment in rural towns and villages as hubs of economic and social activity is planned through broadband infrastructure and the adoption of a place-based approach to rural development.

3.2 Regional Strategies & Policies

Spatial planning and economic development in Ireland are currently under the remit of three Regional Assemblies, which each consist of members of City and County Councils. County Carlow lies within the Southern Regional Assembly (SRA).

Southern Regional Assembly – Regional Spatial & Economic Strategy

The SRA has prepared a Regional Spatial & Economic Strategy (RSES) for the Southern Regional area which sets out the economic and spatial strategy for the Southern Region for the next 12 years. The RSES Vision is to:

- Nurture all our places to realise their full potential
- Protect and enhance our environment
- Successfully combat climate change
- Achieve economic prosperity and improved quality of life for all our citizens
- Accommodate expanded growth and development in suitable locations
- Make the Southern Region one of Europe's most creative, innovative, greenest and liveable region

Carlow Town is identified as a Key Town in the RSES. The RSES identifies the town's strategic location within the South-East, its pivotal inter-regional role and its strong links to the Midlands and the Greater Dublin Area as its strengths. The RSES recognises Carlow as a regional centre for education, healthcare, public services, shopping and arts, culture, leisure and recreation for a wide area extending into Laois, Kildare and Wicklow.

3.3 County Policies

County Development Plan

The Carlow County Development Plan 2015-2021 sets out the aim of developing the County through enhancing Social, Economic, Cultural and Environmental objectives, taking advantage of its strategic regional location in the South-East Region. The overarching vision of the Development Plan is to achieve a vibrant County of opportunity with a high quality of life and an attractive quality environment. The Plan outlines a series of strategic goals that cover the development of infrastructure development, tourism, housing, access and balanced and sustainable growth, all of which are aligned with this economic development plan.

A Draft Carlow County Development Plan 2022-2028 has been issued for consultation. The purpose of this plan is to 'set out an overall strategy for the proper planning and sustainable development of the County.' The plan is proposed to be operational between 2022 and 2028 and builds on Project 2040 and the RSES, focussing on areas such as; housing, economic development, sustainability, rural and urban development, tourism, etc.

Project Carlow 2040

Project Carlow 2040 is the Regeneration Strategy for Carlow Town. The plan sets the development of Carlow Town in the context of the national strategies such as the NDP and NFP and includes a number of interventions envisaged for Carlow Town which will transform the town into a regional powerhouse in the South-East, by taking advantage of its location and convenience to the Greater Dublin Area and the Midlands region.

A number of Guiding Principles have been formulated that provide a framework and coordinated approach to deliver the vision that Carlow Town will be a place for all its people, where residents, workers and visitors alike will be encouraged, through enhanced connections and improvements in the public realm, to access everything the Town Centre has to offer including business and retailing, education, amenity spaces and cultural heritage.

The Guiding Principles seek to address the existing challenges facing Carlow Town by building on the many assets and attractors of the Town. Project Carlow 2040 will see Carlow Town become a centre for education, cutting edge business, high quality retailing and a Town that prioritises the wellbeing of its visitors and residents.

The ten principles in Project Carlow 2040 are:



Reduced Vacancy



Tourism & Short Stay Visits



Realise the full potential of infrastructure (road, rail, air, bus and water)



Promote high quality of life, health and wellbeing



A Town perceived as an exciting and safe place to live, work and visit



A Distinctive Town



Increased Town Centre Footfall



Build a resilient and adaptable economy



Deliver high quality and person-centred buildings and public realm



Diversity of uses in the Town Centre

Tourism Strategy and Action Plan 2020-2025

The **Tourism Strategy and Action Plan 2020-2025** commissioned by Carlow Tourism outlines the opportunity that exists to maximise the potential of the 'Ireland's Ancient East' brand via the use of the large gardens and historic houses located throughout the County. The strategy also outlines the potential to strengthen Carlow's tourism sector through the use of natural resources such as the River Barrow and Blackstairs Mountains. The **Outdoor Recreation Vision for 2040** and **Walking and Cycling Trail Development strategies** developed by Carlow County Council complement the tourism strategy. Another area of opportunity which the Tourism Strategy and Action Plan 2020-2025 highlights as a significant area for growth within tourism is the food and drink sector within Carlow, given its rich history across the county.

The Taste of Carlow 2020-2025, Carlow's Food & Drink Strategy

The **Taste of Carlow 2020-2025** provides a blueprint for growth for food and drink stakeholders in the county. Delivered by Carlow County Council and its Local Enterprise Office in partnership with Carlow Tourism, Carlow County Development Partnership, IT Carlow, Carlow Local Community Development Committee, and private industry interests, the main goal of the Food and Drink Industry Strategy is to encourage the production, processing, promotion and consumption of locally produced food and drink.

County Carlow Business Support & Economic Recovery Action Plan

In response to the Covid-19 pandemic, Carlow County Council developed a short-term Economic Development Plan that aimed to help businesses, and curb some of the economic fallout. The action plan set out 5 actions as the cornerstone for recovery:

- Action 1: Promotion of County Carlow as a Tourism Destination
- Action 2: Supporting Entrepreneurial Challenges & Opportunities – Development of Industry/Agency Partnership approach
- Action 3: Utilising knowledge of business to support those who are unemployed
- Action 4: Promoting County Carlow Consumer Experience
- Action 5: Development of a future EU Opportunity framework

While the business support and economic recovery plan focusses on recovery from the pandemic, the themes have relevance beyond the immediate economic challenges. As such, this new economic strategy plan takes cognisance of the themes and seeks to build upon them for the longer term success of the Carlow economy.

3.4 Strengths, Weaknesses, Opportunities and Challenges

Beyond the context of national and regional strategies, broader insights into the issues the economic strategy should address were explored through detailed public and stakeholder consultations and a survey of members of Carlow County Council. The key issues emerging from the survey and the consultations are summarised in the following strengths, weaknesses, opportunities and challenges.

Figure 3.4.1: SWOC Analysis on the Consultation key themes

Strengths	Weaknesses
<ul style="list-style-type: none"> • Carlow’s geographic location, with ease of access to Dublin, the Midlands and the South East Region • The development of the Technological University on the IT Carlow campus – talent availability and R&D potential • Quality of life is excellent – particularly for ‘settling down’ • Cost of living – housing, etc. • Strong Transport Connections – through rail and road connections • Strong industry clusters throughout county – Financial Services/Fin-Tech, ICT and Engineering • Natural beauty and its tourism potential – River Barrow and Mount Leinster (Blackstairs) • Strong business base 	<ul style="list-style-type: none"> • A low profile in external markets • Vacant property issue within Town Centres • Town Centre vitality (especially the evening and retail economy) • The retention of students post-graduation • Difficulty in the attraction of FDI • A lack of expansion/new space for hot desks/soft landing type inward investment • Linkages between indigenous firms and education sector could be stronger
Opportunities	Challenges
<ul style="list-style-type: none"> • The expansion of the tourism sector • Potential linking to Ireland’s Ancient East brand – garden trails • Potential development of ‘remote hubs’, building on Carlow’s Quality of Life excellence • Increased potential for industry links with Carlow IT (and new TU). Fostering research and business development i.e. spin-outs • Improving the outward brand of Carlow to enhance Carlow’s reputation and visibility to international and domestic investors/visitors • Growth opportunities across sectors of strength and opportunity • Improved skill profile through the development of the Technological University • Development of supply chain opportunities for indigenous firms • The development of a distribution hub, utilising the convenience of Carlow’s location to Dublin, etc. 	<ul style="list-style-type: none"> • The Broadband provision across the county • Availability of ‘suitably skilled’ apprenticeships across the county and beyond • Availability of suitable land/property for ‘remote working hubs’ limited or held by private investors • Retention of talent, given convenience to Dublin • Tourism: asset rich but experiences are not well developed/profiled • Export knowledge and key market development knowledge of SME firms

3.5 Summary

These SWOC themes, the preceding assessment of socio-economic characteristics, priority sectors and broader context provide the basis for a suite of areas where economic development and business support efforts are required.

4. Economic Development & Business Support Strategy 2021-2027



4. Economic Development & Business Support Strategy 2021-2027

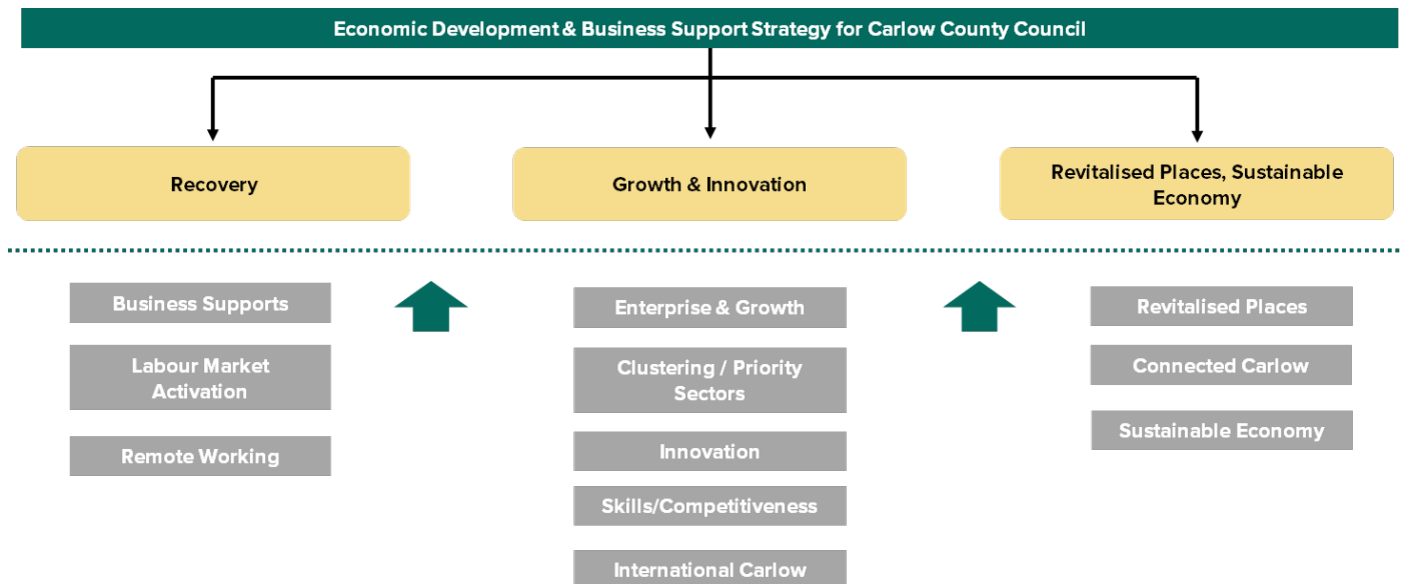
4.1 Vision and Priorities

The actions proposed in this Economic Development and Business Support Strategy aim to deliver on a vision for Carlow's economy to:

Recover and grow sustainably to achieve a vibrant county, with revitalised towns and villages, which creates economic opportunities to enable people and business to thrive.

Underpinning the delivery of the vision, three 'pillars of focus' are proposed which address economic development across the whole county. Given the immediate impacts and challenges from Covid-19, the first pillar is 'Recovery'. Then, as the economy emerges from the pandemic, 'Growth and Innovation' will drive the future direction of the economy in key areas of business growth and priority sector development. Finally, 'Revitalised Places, Sustainable Economy' aims to address town and village vitality and shift the Carlow economy towards achieving environmental targets. A range of sub-themes are presented in the following sections under each pillar.

Figure 4.1.1: The Three Pillars of Growth



4.2 Recovery

The impact of the Covid-19 pandemic raises the risk of significant levels of unemployment. While pandemic supports have shielded many businesses and employees from the worst effects of closure, the longer restrictions have lasted, the greater the risk of permanent economic scarring. The themes and actions proposed here are aimed at supporting people and business as the recovery takes hold.

Business Supports

While government supports have protected a significant proportion of the economy from more severe pandemic impacts, a recovery phase will require a ‘watching brief’ and an ability to provide support to businesses within the local economy that, while viable, may remain vulnerable. An agility will be required to be able to identify necessary supports and deploy them at pace.

Labour Market Activation

The impact of the Covid-19 pandemic and the ongoing uncertainty around Brexit raises the risk of increased levels of unemployment. Labour market activation actions encompassing training support, job search assistance and job matching services will be required to minimise the risks.

Remote Working

The Covid-19 pandemic has demonstrated how viable home, remote and blended working can be. The ‘Making Remote Work: National Remote Work Strategy’ seeks to ensure that remote working is a permanent feature in the Irish workplace in a way that maximises economic, social and environmental benefits. Carlow’s quality of life, natural assets and ease of access to Dublin provide a compelling remote working proposition.

Sub-Theme	Policy Actions	Owner/Delivery Partner
1.1 Business Supports	1.1.1 Support enterprises through maintaining peer networks and collaboration between industry and the state to develop new supports for County Carlow to promote Covid mitigation/Brexit or adaptation measures by the development of the InCarlow Enterprise Advisory Panel.	Lead: Carlow County Council / Local Enterprise Office
1.2 Labour Market Activation	1.2.1 Job Search Support – Provision of a co-ordinated approach in providing labour market activation programmes (training, interview support), community employment programmes and a rapid response ‘one front door’ for job matching across the county.	Lead: Carlow Local Community Development Committee (LCDC) / SICAP Carlow County Development Partnership Department of Social Protection
1.3 Remote working	1.3.1 Undertake a market demand and utilisation study to understand the optimal location of remote working hubs in Carlow (driven by commuter trends), to ensure optimal use and avoid duplication of provision.	Lead: Carlow County Council / Local Enterprise Office
	1.3.2 Submit funding applications for remote working hubs in Myshall & Hacketstown as part of the Town & Village Renewal Scheme.	Lead: Carlow County Council / Local Enterprise Office
	1.3.3 Support the development of remote working hubs by private, community and public providers in rural location across County Carlow.	Lead: Carlow County Council Local Enterprise Office Broadband Officer
	1.3.4 Support the Rathvilly Community in the development of the Remote Working Hub and Enterprise Space as part of Vision Rathvilly 2040.	Lead: Carlow County Council / Local Enterprise Office
	1.3.5 Engage with National Hub Network (Connected Hubs) of remote working hubs and maximise business broadband connectivity points opportunities across the County.	Lead: Carlow County Council Local Enterprise Office Broadband Office

4.3 Growth and Innovation

Research conducted by the OECD reviewed SME policy and entrepreneurship within Ireland. Their analysis found that indigenous SMEs are less innovative, less productive and less export-orientated than foreign owned counterparts. Separately, consultations noted that ‘grow on’ space is in short supply in Carlow, hindering expansion opportunities. Addressing these challenges will boost productivity, export intensity, and the overall profile of the county. The following sub themes aim to address these challenges and deliver a growing and innovative business sector.

Enterprise and Growth

Business start-up and growth are vital components of success in any economy, whether this be through the development and growth of indigenous business or through the attraction of inward investment. Ensuring a supportive environment that creates the conditions for business success is key to unlocking business growth.

Clustering/Priority sectors

While it is important to ensure a supportive environment for all businesses, it is equally important to ‘play to our strengths’ and craft an identity through the growth of strong clusters and priority sectors. Sectors that are considered likely to support significant economic growth include Financial Services, ICT/Technology, Engineering & Manufacturing, and Tourism. Sectors that have the potential to produce and enable significant and incumbent growth are Agri-Tourism, Pharma, and Transportation.

Innovation

The importance of R&D and innovation in delivering productivity gains are not always well understood by businesses. Promotion of innovation, and greater collaboration between the industry and newly announced Technological University could promote innovation opportunities to lever EU funding aimed at promoting collaboration and wider Research.

Skills and Competitiveness

The availability of an appropriate skills pipeline is an enabler of growth. More specifically, it was noted as part of the consultation process that there is a difficulty in the attraction of apprenticeships and those with ‘work ready’ skills for firms engaged in the Engineering sector. Skills and employability issues have been exacerbated following the Covid-19 pandemic, which is resulting in job losses in key industries such as tourism and hospitality. These sectors may take time to recover and will invariably see people leave the sectors permanently. Coupled with this, trends towards automation and Artificial Intelligence will amplify the need for re-training and up-skilling.

International Carlow

International marketing is an important element in attracting investment, students and visitors. Internationalisation is also key for business growth, particularly in the context of Brexit. More firms need to export and those that do export need to build a broader base of external markets. The actions we propose to undertake to address growth and innovation are:

Sub-Theme	Policy Actions	Owner/Delivery Partner
2.1 Enterprise and Growth	2.1.1 Act as an intermediary in introducing businesses who operate within the county, encouraging business collaboration for innovation and aiding the development of supply chains.	Lead: Carlow County Council
	2.1.2 Provision of ‘meet the buyer’ events connecting local businesses, from SMEs to multinationals, to promote ‘local supply to buy’ for procurement.	Lead: Carlow County Council Local Enterprise Office County Carlow Chamber Procurement Office Carlow County Council
	2.1.3 Provision of capacity development training for SMEs in County Carlow.	Lead: Carlow County Council / Local Enterprise Office Carlow Kilkenny Skillnet IT Carlow Carlow / Kilkenny ETB
	2.1.4 Publication of an up to date catalogue of business development sites which outlines their location and their potential opportunities for development	Lead: Carlow County Council / IDA / Enterprise Ireland
	2.1.5 Support the development of programmes for vacant shops.	Lead: Carlow County Council
	2.1.6 Support the development of the InCarlow - Technical Export & Innovation Campus on O’Brien Road, Carlow.	Lead: Carlow County Council / Carlow Community Enterprise Centres CLG
	2.1.7 Support the development of Enterprise Spaces & Hubs in Bagenalstown & Tullow	Lead: Carlow County Council / Carlow Community Enterprise Centres CLG
	2.1.8 Examine the opportunity to develop a Creative & Craft Incubator Facilitator in Carlow.	Lead: Carlow County Council / Carlow Community Enterprise Centres CLG
	2.1.9 Examine the opportunity to develop an Enterprise Centre in Tullow Municipal District Co. Carlow.	Lead: Carlow County Council

Sub-Theme	Policy Actions	Owner/Delivery Partner
2.2 Clustering/ Priority Sectors	2.2.1 Develop programmes to support manufacturing and international traded services in partnership with the Carlow Business Community.	Lead: Carlow County Council County Carlow Chamber Engineering the South East.
	2.2.2 Support the work of the Ireland South East Development Office including engagement with Regional Enterprise Plan & Regional Tourism Group.	Lead: Carlow County Council / Industry / All
	2.2.3 Develop specific cluster in Tourism Experiences in South County Carlow.	Lead: Carlow County Council / Carlow Tourism CLG/Fáilte Ireland
	2.2.4 Maintain and develop a Food & Drink industry specific cluster based on the InCarlow Food & Drink Strategy.	Lead: Carlow County Council / Industry
	2.2.5 Sustain and grow the Design, Craft & Creative Sector cluster by continued support of FORM.	Lead: Carlow County Council / Industry Fáilte Ireland LCDC
	2.2.6 Development of a Craft & Creative Strategy for County Carlow.	Lead: Carlow County Council Industry
	2.2.7 Delivery of the Craft Hub – Creative Europe EU Project.	Lead: Carlow County Council Local Enterprise Office Library & Arts Section
	2.2.8 Development of a Female Enterprise Development Network.	Lead: Carlow County Council
	2.2.9 Support the Tourism Sector by delivery of a Tourism Marketing & Development Programme of activities which have measured economic benefits and outputs	Lead: Carlow County Council Carlow Tourism
2.3 Innovation	2.3.1 Promote business interaction with the Technological University.	Lead: County Carlow Chamber
	2.3.2 Engage business in the development of a relationship with the Technological University to help promote ‘work ready’ skills and up-skilling/re-training for participants who have been affected by the pandemic.	Lead: South East Skills Forum
	2.3.3 Secure funding that promotes and aids business engagement in R&D.	Lead: IT Carlow
	2.3.4 Develop business links between IT Research Departments and the local business base to encourage collaboration, innovation and R&D.	Lead: IT Carlow
	2.3.5 Promote and encourage spin-out developments from IT Research Departments making IT Carlow a leader in ‘green tech’ development.	Lead: IT Carlow Research Centres
2.4 Skills/ Competitiveness	2.4.1 Develop ‘assured skills’ programmes for key sectors, such as tourism and engineering, that link between industry and participants, providing a constant labour supply of highly qualified/motivated employees.	Lead: South East Skills Forum / Engineering in the South East Carlow Kilkenny Skillnet
	2.4.2 Development of a ‘Come Home to Carlow’ campaign to bring people back to the area in the context of remote working.	Lead: Carlow County Council IT Carlow IDA County Carlow Chamber Carlow Tourism
2.5 International Carlow	2.5.1 Development of an Investment Communications Group with key stakeholders to make an annual plan for promotion of County Carlow as a location for Investment.	Lead: Carlow County Council IT Carlow IDA County Carlow Chamber Carlow Tourism
	2.5.2 Further develop promotional material that promotes the county as an attractive place for companies and people to locate due to the quality of life.	Lead: Investment Communications Group (as per 2.5.1)

Sub-Theme	Policy Actions	Owner/Delivery Partner
2.5 International Carlow	2.5.3 Provide 'export readiness' supports to SMEs including an SME business hub which allows SMEs to avail of bespoke market intelligence and wider business development potential.	Lead: Carlow County Council / Local Enterprise Office Enterprise Ireland
	2.5.4 Develop Carlow town and Tullow to destination town status.	Lead: Carlow County Council / Fáilte Ireland
	2.5.5 Support the development of a sustainable Tourism & Community Festivals series for County Carlow.	Lead: Carlow County Council
	2.5.6 Develop a strategy for securing EU Funding to support the objectives of this Economic Development & Business Support Strategy.	Lead: Carlow County Council / IT Carlow / Carlow County Development Partnership

4.4 Revitalised Places, Sustainable Economy

Revitalised Places

Town and village centres act as important economic hubs. Project Carlow 2040 sets out the transformative aim of regenerating Carlow Town, which will result in 'economic, social and wider environmental benefits' for Carlow County. The trend towards home working arising from Covid-19, presents an opportunity to revitalise town and villages. The opportunity to protect and sustain rural towns and villages is recognised in the Rural Action Plan and the regeneration need has been a consistent theme throughout the consultations in preparation of this action plan. This, coupled with vacancy levels of commercial premises located throughout the county is an ongoing challenge. A 'town centre first' approach should be central to actions proposed in this action plan.

Sustainable Economy

To counteract climate change the EU and Ireland have signed up to a 'Climate Action Plan⁵', which sets out the ambition of achieving carbon neutrality throughout the EU by 2050 – a highly ambitious target. The action plan sets out 180 actions to achieve this ambitious target, with most of these set for targeted achievement by 2030.

With the EU setting the pace for targeted reduction, Ireland, and Carlow, can lead the way in terms of carbon reduction and embracing sustainable economy opportunities.

Carlow County Council - Climate Action Plan

In Delivering Effective Climate Action 2030, the local government strategy on climate action, an overarching commitment on leadership, is highlighted to ensure a coherent approach to climate action across the administrative and political structures of all 31 local authorities. This commitment acknowledges how well positioned local authorities are to effect change via their close relationships with their communities. It builds upon their extensive knowledge of the natural and built

environments within their functional areas. It acknowledges their already established engagement in climate action measures with examples such as; emergency response to severe weather events, flood alleviation measures, infrastructural provision, protection of the natural environment, energy efficiency and reduction and housing retrofits.

The Climate Action and Low Carbon Development (Amendment) Act, 2021 enshrines the National Climate Objective to pursue and achieve, by no later than the end of 2050, the transition to a climate resilient, biodiversity rich, environmentally sustainable and climate neutral economy. The Act frames Ireland's legally binding climate ambition to delivering a reduction in greenhouse gas emissions of 51% by 2030. This will place the country on a trajectory to achieving climate neutrality by no later than the end of 2050.

As part of this, the role of the local authority is highlighted, specifically, to develop and implement a Local Authority Climate Action Plan. Such plans will drive the adaptation and mitigation measures required at local level. The plans will see each local authority actively translating national climate policy to local circumstances with the prioritisation and acceleration of evidence-based measures, to assist in the delivery of the climate neutrality objective at local and community levels.

The Climate Action and Low Carbon Development Amendment Act 2021 prescribes that:

Each local authority shall prepare and make a plan relating to a period of five years (... referred to as a 'local authority climate action plan') which shall specify the mitigation and the adaptation measures to be adopted by the local authority'.

Through the development and implementation of specific, action-focused, time-bound and measurable actions, the local authority climate action plan will:

⁵ Climate Action Plan 2019: To Tackle Climate Breakdown; Government of Ireland (2019); <https://www.gov.ie/pdf/?file=https://assets.gov.ie/25419/c97cdecddf8c49ab976e773d4e11e515.pdf#page=null>

- Provide a strong emphasis on a place-based approach to climate action, delivering a better understanding of greenhouse gas emissions and climate-related risks at a local level, while addressing context-specific conditions and support for locally tailored policy making.
- Deliver and promote evidence-based and integrated climate action by way of adaptation and mitigation measures, centred around a strong understanding of the role and remit of the local authority on climate action.
- Translate and provide strategic direction at local and community levels on the delivery of the national climate objective which is seeking to curb further global warming and transition to a climate resilient, biodiversity rich, environmentally sustainable and climate neutral economy by no later than the end of 2050.

In its preparation and implementation of a Climate Action Plan and building on the works completed in the Carlow Climate Adaptation Strategy 2019, Carlow County Council will seek opportunities to bring

together critical stakeholders across communities and businesses to build a vision for a climate neutral future. As part of the Climate Action Plan, Carlow County Council, will be responsible for reducing greenhouse gas emissions from across its own assets and infrastructure whilst also taking on a broader role of influencing and facilitating others to meet their own targets.

Guidelines for the preparation of Climate Action Plans at local authority level are currently in preparation to ensure a coherent and consistent approach to climate action planning is adopted by local authorities across the country. Following their completion, it is anticipated that local authorities will be given a one year timeframe in which to prepare a Climate Action Plan. Carlow County Council is mindful of its commitments and responsibilities to the communities it serves and intends to prepare and implement its Climate Action Plan in co-operation and consultation with the people of Carlow to reflect the local and regional context of the local authority in delivering on the national climate objective at a local level.

Sub-Theme	Policy Actions	Owner/Delivery Partner
3.1 Revitalised Places	3.1.1 Undertake a 'stock take' of land/vacant property and compile a database of available land/vacant property in Carlow Town.	Lead: Carlow County Council
	3.1.2 Development of a Way Finding & Interpretation Strategy for County Carlow.	Lead: Carlow County Council
	3.1.3 Development of a St. Mullins, Heritage & Tourism Plan to consider suitable interventions which realise the potential of the area.	Lead: Carlow County Council
	3.1.4 Development of a Feasibility Study for the enhancement and development of the Carlow Castle Area in Carlow Town.	Lead: Carlow County Council
	3.1.5 Support the redevelopment of the Ballon Community Enterprise Centre by the development of a business case and subsequent funding applications.	Lead: Carlow County Council
	3.1.6 Support the pre-development of the Vision Rathvilly 2040 Programme under the Rural Regeneration & Development Fund.	Lead: Carlow County Council Community
	3.1.7 Support the development of a Water Activity Hub in Graiguecullen, Co. Carlow.	Lead: Carlow County Council
	3.1.8 Promote re-engagement with the high streets across the county through supporting the 'Love Carlow' initiative.	Lead: County Carlow Chamber
	3.1.9 Support 'meanwhile use' for vacant premises by linking with schools and community groups to use vacant premises as art galleries or 'maker spaces'.	Lead: Carlow County Council
	3.1.10 Participate in the RuBan – Urbact Network and evaluate potential future opportunities for County Carlow.	Lead: Carlow County Council.
	3.1.11 Support the development of Masterplans, Town & Village Health Checks / Public Realm / Tourism, Amenity & Heritage Plans & Village Led Design Statements based on the Category Criteria and National Funding.	Lead: Carlow County Council
	3.1.12 Progress the development of the Presentation Building, Tullow Street, Carlow as an economic, social and cultural hub for the South East Region.	Lead: Carlow County Council

Sub-Theme	Policy Actions	Owner/Delivery Partner
3.2 Sustainable economy	3.2.1 Support the development and implementation of the National Broadband Plan (NBP).	Lead: Carlow County Council / Broadband Officer
	3.2.2 Secure funding that helps upgrade broadband infrastructure in rural areas that aren't covered by the NBP.	Lead: Carlow County Council / Broadband Officer
	3.2.3 Support and implement the 3CEA ⁶ strategy into the Council's work promoting energy efficiency and renewable actions.	Lead: Carlow County Council
	3.2.4 Sign up to the European Circular Cities Declaration ⁷ promoting the Circular Economy ethos.	Lead: Carlow County Council
	3.2.5 Lead and support the development of the Climate Action Plan for County Carlow.	Lead: Carlow County Council

4.5 Delivering the actions

Economic development does not happen in isolation. The themes and actions proposed are cross-cutting and will require co-ordinated and concerted efforts by all partners if Carlow County Council is to deliver on the vision for the county. The willingness of stakeholders to engage throughout the preparation of this action plan is testament to the strong collaborative spirit within the county. Carlow County Council will nurture these relationships and co-design actions and interventions to ensure we are adding value and avoiding duplication in all that we do.

4.6 What does success look like?

This action plan has been developed during an exceptional economic shock. The recovery path is not yet clear, which makes setting Key Performance Indicators difficult. That said, the actions proposed in this business support and economic development plan are framed to deliver a more competitive economy, business growth and jobs between 2022 and 2027 and the following targets are proposed as challenging but achievable:

- Increase the number of active enterprises from 2,800 to 3,000 by 2027.
- Support the creation of 1,200 jobs between 2022 and 2027.

⁶ 3 Counties Energy Agency Energy Transition Strategy 2020-2030; 3CEA (2020); <https://3cea.ie/2020/02/04/the-launch-of-3-counties-energy-agency-energy-transition-strategy-2020-2030/>

⁷ European Circular Cities Declaration; ICLEI Europe (2020); <https://circularcitiesdeclaration.eu/>

Appendices



Appendix 1 – Consultations

Background

Consultations were a key component of this strategy development and were held with stakeholders across the county to capture key insights and the expert opinion of those with an in-depth knowledge of the county. These consultations helped Grant Thornton to form the basis of the economic strategy by identifying areas of improvement, opportunity or risk to the County Carlow economy.

What we discussed

Each consultation provided an opportunity for stakeholders to set out their views and recommendations as to how Carlow County Council and other public bodies can best position the Carlow economy to achieve growth over the coming years. In particular, we sought expertise and insights on assisting us to answer the following:

1. Key macro/general economic challenges that the economy faces;
2. Any barriers to growth that your company is facing;
3. The opportunities that are available for Carlow's economy to grasp;
4. Your views on the policy priorities that an economic growth plan should focus on;
5. Opportunities for partnerships/collaborative delivery of economic growth initiatives

Who we met

Grant Thornton are grateful to the people from the following organisations, presented in alphabetical order, who offered their time to meet with us and offer their views on economic development in the county.

- Arboretum
- Bagenalstown Area Chamber of Commerce
- Bridgewater
- Carlow College
- Carlow County Council
- Carlow County Development Partnership Ltd.
- Carlow Kilkenny Skillnet
- Carlow Tourism
- County Carlow Chamber
- Delmec
- Enterprise Ireland
- Fáilte Ireland
- Fairgreen Shopping Centre
- Halocare
- IDA Ireland
- Independent Investor
- Ireland South East Development Office Ireland
- IT Carlow
- Kilkenny Carlow ETB
- P.B. Machines
- Regional Skills (South East)
- South East Business Incubation Centre
- Three Counties Energy Agency
- Unum Ireland
- Waterways Ireland
- Department of Social Protection



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