

Carlow LECP

Socio-Economic Statement, 2022



COMHAIRLE CONTAE
CHEATHARLACH
CARLOW COUNTY COUNCIL



Table of Contents

Introduction	1
Background and Legislative Context	1
Carlow Approach	2
Policy Context	5
Policy Alignment and Complementarity	6
EU Policies and Frameworks	7
National Policies and Frameworks – their interfaces with EU frameworks and local relevance	8
Furthering Complementarity and Sustainability	9
Socio-Economic Highlights	11
Demographics / Population	12
Social Variables	13
Education	14
Economics and Employment	14
Health and Disability	16
Housing	16
The Natural Environment	16
Agriculture	16
Socio-Economic SCOT Analysis	17
Draft Vision and High-Level Goals (HLGs)	21

Introduction

This document provides a significant building-block in the formulation and development of the Carlow Local Economic and Community Plan (LECP), 2023-2028. It begins by outlining the national-level background and legislative context – demonstrating how the LECP enables Carlow County Council to guide and coordinate development efforts at county and sub-county levels and to enable improved service delivery to communities. Carlow County Council is pursuing an evidence-based and inclusive approach to the LECP's formulation, and this document summarises the process that has been rolled out to date and its anticipated evolution up to May 2023, when the process is due for completion. This document then provides a synthesis of the EU and Irish policies that are most relevant to the formulation and delivery of the LECP. It situates this synthesis in the context of the United Nations Sustainable Development Goals (UNSDGs), and it notes how the UNSDGs provide a useful framework and set of imperatives for the LECP. This document also presents an overview demographic and socio-economic profile of County Carlow, and this profile along with the review of the previous LECP, provide useful pointers for the formulation of the LECP's mission statement and associated high-level goals.

Background and Legislative Context

The purpose of the LECP, as provided for in the Local Government (Reform) Act 2014, is to set out, for a six-year period, the objectives and actions needed to promote and support the economic development and the local and community development of the relevant local authority area, both by itself directly and in partnership with other economic and community development stakeholders.

LECPs support the sustainable development of our counties. First described in *Putting People First: Action Plan for Effective Local Government* and then given effect in the Local Government (Reform) Act 2014, they form the local element of the national development framework, and they seek to support collaboration to increase the quality of life in our communities. This strategic approach has never been more important as Ireland looks to support a sustainable recovery from the impacts of the COVID-19 pandemic.

All local authorities published their first LECPs in 2016/2017, and the process to develop new LECPs provides the opportunity to reflect on the experiences of all stakeholders in the intervening period. The process to support the development of a new LECP is described in the recent guidelines (*Local Economic and Community Plans – Guidelines 2021*), prepared by the Department of Rural and Community Development (DRCD) and the Department of Housing, Local Government and Heritage (DHLGH), and it should be fully informed by the learning and experiences of all relevant stakeholders through both internal and public consultation - to ensure a robust LECP for the next 6-year period.

The aim of the guidelines is to provide support to local authorities and relevant local partners to help them to develop and implement comprehensive and flexible 6-year plans that will support the sustainable development of their areas over the lifetime of the plan. Consultations undertaken as part of the guideline-development process indicated the need to ensure that the LECP is more agile and allows stakeholders to respond to emerging needs on an ongoing basis. As such, the structure of the guidelines points to two linked phases: Section A supports the development of the Integrated Framework LECP, which represents the strategic part of the LECP development process. The main feature of the overall LECP framework will be a set of high-levels goals for the integrated plan, which will be supported by specific sustainable objectives under the respective economic and community streams. Each objective will, in turn, consider potential outcomes and high-level indicators for the 6-year planning period. Section B addresses the implementation plan process, which is aimed at achieving the objectives of the framework LECP.

Carlow Approach

Carlow Local Community Development Committee has commenced a process to prepare a local economic and community plan (LECP) for the period 2023-2028. This plan will build on the learnings and achievements of the previous LECP, and it will seek to provide a strategic vision and framework for integrated and sustainable economic and community development across the county over the next five years. The plan will be evidence based and informed by extensive research and stakeholder consultation that take place over the period September 2022 to May 2023. In line with the aforementioned government guidelines, Carlow County Council is pursuing a 6-stage iterative approach, as outlined in the following diagram.

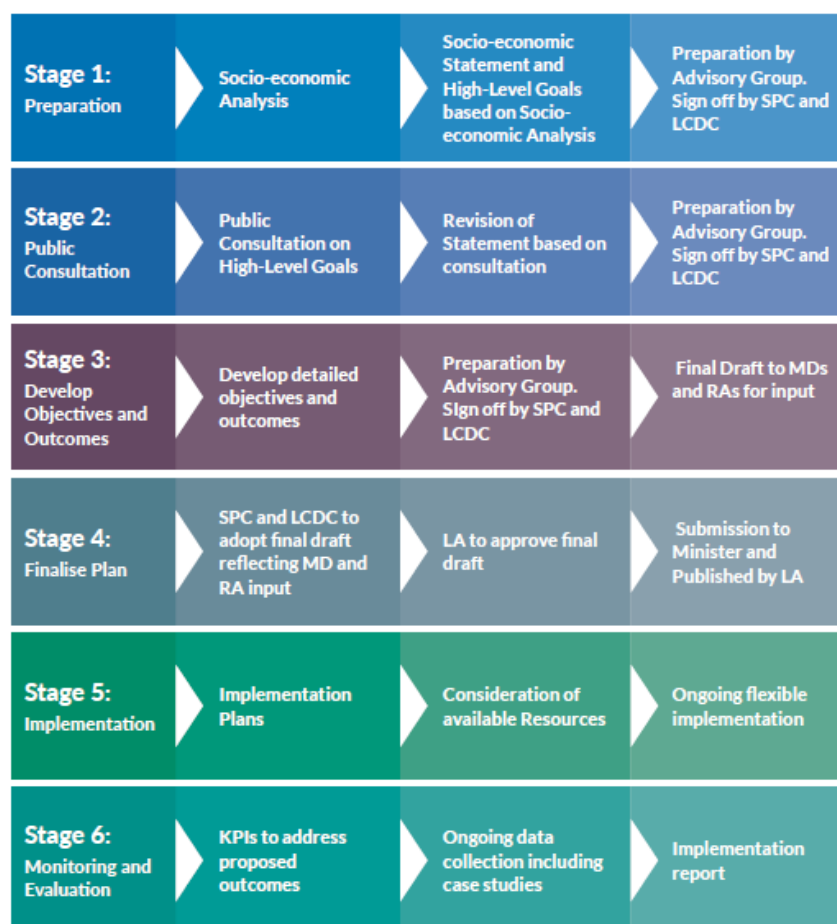


Figure 1: LECP Development Stages

In advance of embarking on this iterative process, Carlow County Council:

- ✓ Established an LECP advisory group; and
- ✓ Undertook a review of the previous LECP (2016-2021).

The LECP Advisory Group includes representatives from the local authority and the agencies and organisations that are most directly responsible for the LECP's formulation and implementation. The review of the LECP was completed in autumn 2022, and it involved a mixed-methods approach – a questionnaire survey and focus group. The review identified how stakeholders can build on the previous LECP and how they can refine its strategic approach. It noted satisfaction with LECP-related

achievements over the past six years, the merits of a collaborative framework and approach, and the need for more systemic and robust monitoring and evaluation.

Stage 1 of the LECP-formulation process focuses on preparation, evidence-building and data collation. Thus, People & Place has prepared a socio-economic profile of County Carlow that builds on the census atlas of the county that was produced in 2019. This profile includes preliminary data from the 2022 Census of Population and recently published data from the 2020 Census of Agriculture. The profile also incorporates current data on relevant socio-economic features, including housing, ecology and citizen well-being. Where possible, People & Place has benchmarked County Carlow values against those of the State and NUTS II and III regional tiers. Moreover, the profile provides sub-county data, including at municipal district and settlement levels. Thus, it represents a significant body of objective data and information to enable the LECP Advisory Group to undertake a SCOT analysis, identify needs, potential and priorities and to formulate high-level goals.

During Stage 1, the LECP Advisory Group also agreed a timetable and methodology for the development of the LECP. The timetable envisages completion by May 2023, while the methodology provides for a series of stakeholder engagements and consultations, with the bulk of these due to take place in January / February 2023. Stage 1 was completed in November 2022, with the Advisory Group meeting to refine the high-level goals on December 2.

Stage 2 involves intensive statutory and sectoral stakeholder engagements in the formulation of the LECP (see Figure 2 below). Beginning in December 2022, People & Place will work with Carlow County Council to design and distribute a survey instrument to enable stakeholders to further refine the high-level goals and tease out relevant strategic actions and approaches. This survey will be rolled out over the course of January 2023, and it will parallel the convening of (mainly online) stakeholder workshops. Stage 2 will complete in early March 2023 and will feed into the formal adoption of the high-level goals and strategic objectives on the parts of the local community development committee (LCDC) and relevant strategic policy committees (SPCs).

Stage 3 will involve working on the feedback received from the LCDC, SPCs and regional assembly in order to develop detailed objectives, outcomes and strategic actions. During this stage, People & Place will work with the LECP Advisory Group to identify beneficiaries and to formulate over-arching targets and indicators as well as a system for ongoing review and monitoring. Thus, by early April 2023, the Advisory Group will be in a position to structure the LECP and seek further feedback from the MDs and regional assembly. This stage is essential in ensuring alignment between the LECP and other policy objectives and fostering a supportive institutional context.

Stage 4 will involve Carlow County Council presenting the strategic environmental assessment (SEA) that will have been progressing over the preceding months, as this represents an essential component in ensuring the LECP's contribution to sustainable development. It will also involve the formulation of a two-year integrated implementation plan, which will sit within the overall six-year strategic framework. Both documents will be submitted to Carlow County Council, for review and approval, in May 2023.

Stages 5 and 6 can parallel the later parts of Stage 4, although they will continue thereafter. They involve (in Stage 5) the formulation of implementation plans – in collaboration with the relevant statutory agencies and sectoral interests, so that the LECP is given effect across all relevant elements of economy and community. The following diagram, which is taken from the government guidelines, illustrates the interfaces between the LECP and the agendas and roles of statutory and sectoral interests. Stage 6 involves agreeing targets and key performance indicators (KPIs).

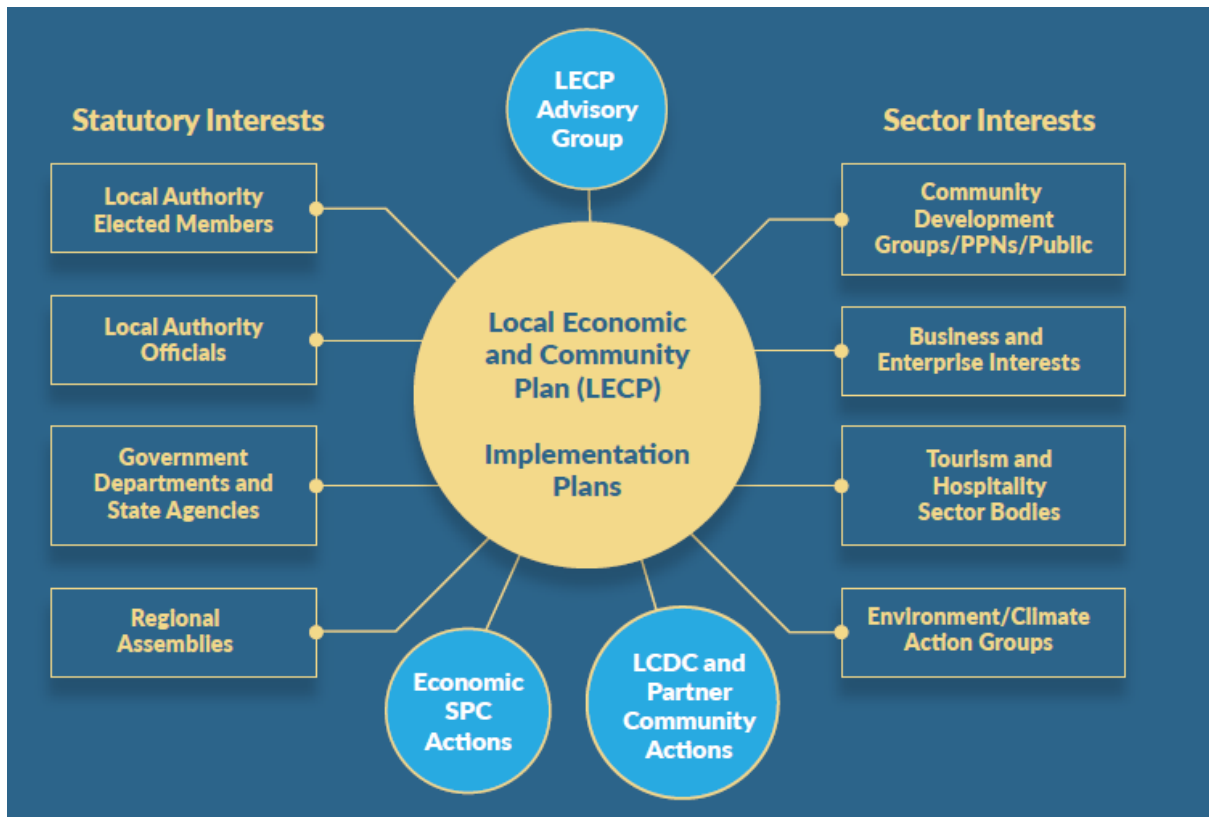


Figure 2: Involvement of Statutory and Sectoral Interests

Policy Context

The Carlow Local Economic and Community Plan (LECP), 2023-2028 is informed by objective research and stakeholder consultations. It is tailored for County Carlow, as it articulates local needs and potential, and it responds to local challenges and opportunities. The initial research findings and preliminary stakeholder engagements confirm the significance of the wider policy milieu in enabling the LECP to attain its high-level goals. Additionally, the LECP offers a mechanism for the local-level delivery of EU and national policy objectives, while local-level experiences and feedback are integral to ensuring responsive and evidence-based policy development. Thus, stakeholders in County Carlow are cognisant of the interactions between the various policy tiers and how policy provisions and interfaces shape the development context.

Sustainable Development Imperatives – linking the global and the local

EU and Irish (national) policies are constantly evolving in response to needs and opportunities, and their orientation has become increasingly focused on enabling, promoting and delivering sustainable development objectives. The maxim ‘think global – act local’ is probably even more relevant today than when it was first advocated in the 1980s, following the publication of Our Common Future. As evidenced by the ongoing COP gatherings and supported by a growing volume of independent scientific data, the attainment of sustainable development objectives requires global and supranational frameworks, and this realisation underpins the United Nations Sustainable Development Goals (UNSDGs). Thus, the UNSDGs provide the overarching global framework for the entire policy milieu in which the Carlow LECP is situated (Figure 3 below). The seventeen goals articulate a vision for humanity that requires more even economic development and equality of opportunity for all peoples regardless of geography, gender or other social factors. Their attainment requires a commitment to ecological conservation and the restoration of biodiversity – at sea and on land. The UNSDGs also provide for improved social, health and educational services and better governance – at all tiers. The realisation of the goals requires tackling so-called ‘wicked problems’, particularly climate change and biodiversity loss, and they advocate a just transition to a post carbon society. Given the transboundary nature of the issues the UNSDGs address and considering the growing inter-connectedness between peoples and places, the UNSDGs require geographical, sectoral and institutional collaboration. Thus, the Carlow LECP is underpinned by collaborative approaches that enable the county to realise a more sustainable development trajectory, thereby improving economic, educational and socio-economic outcomes for all its citizens, while protecting natural resources and making tangible contributions to our global responsibilities.



Figure 3: United Nations Sustainable Development Goals (UNSDGs)

Policy Alignment and Complementarity

The principles and approaches articulated in the United Nations Sustainable Development Goals are reflected in the current iteration of EU policy frameworks, and they influence and shape national-level policy in Ireland as well as policy and practice in County Carlow. As the following diagram illustrates (Figure 4), the County Carlow LECP (2023-2028) refers and relates to a nested set of interlocking policies – in a holistic sense, rather than on discrete sectoral bases. Thus, as the diagram indicates, the UNSDGs provide the external global over-arching policy framework and vision, and these, in turn, shape and guide policy-making and outcomes at the EU and national levels. Moreover, the UNSDGs and the associated lower-tier policy frameworks provide reference points on which the LECP's progress can be measured. Thus, the policy context is relevant, not just to the LECP's formulation, but also to its ongoing implementation and monitoring systems.

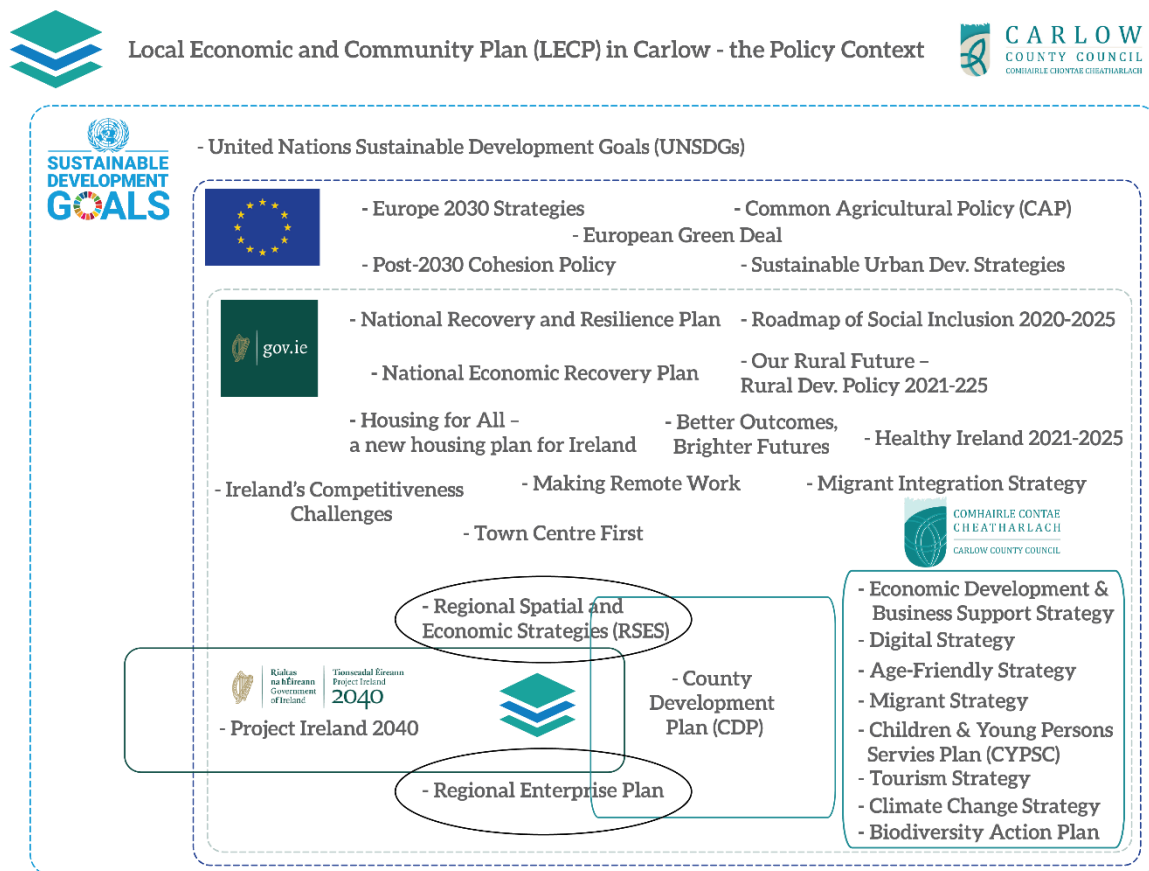


Figure 4: Nested and Integrated Policy Context for Carlow LECP

The European Union (EU) has described itself as a 'natural partner' of the United Nations (UN) with respect to delivering the UNSDGs. The EU's statistics agency – Eurostat – monitors the EU's contributions to the realisation of the UNSDGs, and its reports help shape policymakers approaches to decision-making. Similar approaches pertain at EU member state level; the Irish Government has committed to implementing the UNSDGs, and Ireland has a time-in-motion system in place that records and documents the country's progress in this respect. Statutory bodies and sub-national agencies, including regional and local authorities, have important roles to play in ensuring sustainable development, as they are the primary providers of social services, they are close to communities / citizens and they have both legislative and soft powers with respect to promoting partnership working, enabling economic development, fostering social progress and protecting the natural environment.

Their responsibilities and capacities in this regard are manifest in the various policies that are listed in the diagram here. It should be noted that while policies have to be listed separately, they have several overlapping elements and shared objectives, not least with respect to ameliorating and averting further climate change. The range and scope of policies listed here will evolve over the lifetime of the LECP, but the fundamental structure and alignment that are articulated in this diagram will be constant, along with policy and practice commitments to sustainable development.

EU Policies and Frameworks

As the diagram shows, EU policies are at the second tier – after the UNSDGs, and while there are several areas of EU policy that impact on County Carlow and the LECP, the diagram lists the main and most extensive policies. Europe's strategy to 2030 acknowledges the scale of challenges in respect of climate change and the need for more inclusive societies. It seeks to build on awareness-raising actions and partnership-building in order to enable European society to address climate change, biodiversity loss, resource scarcities, geopolitics, the surge in transparency and privacy expectations, labour market transitions, an ageing population, rising protectionism, income inequality and the widespread adaptation of digital technologies. Through its policies, funding streams and inter-governmental mechanisms, the EU is enabling, encouraging and obliging member states to become more resilient – so that societies and communities are better able to withstand current and anticipated shocks such as those caused by climate change and evidenced by the recent COVID-19 pandemic. EU goals in these regards relate to stakeholders in Carlow as we strive to develop and implement the LECP, and we anticipate keeping abreast of EU research and policy trajectories. Moreover, we are committed to working with national and regional authorities to leverage opportunities arising from inter-territorial collaboration and support mechanisms.

While the EU policies listed here relate to specific sectors, in operational terms, they are bound together by a realisation that public policy needs to support firms, institutions, communities and citizens to become more ecologically responsible, innovative, adaptive and creative. Thus, the EU Green Deal seeks to incentivise all sectors of the economy to be more ambitious in reducing their ecological footprints and to embrace new technologies in maximising energy efficiency, while increasing productivity and generating new employment and training opportunities. Spatial policies, such as the sustainable urban development strategies, are oriented towards improving the attractiveness of urban spaces – enticing and sustaining investment, strengthening local economies and networks and making neighbourhoods more accessible / walkable and self-contained. Similar approaches pertain in respect of rural communities, and the EU anticipates further rollout of smart village approaches over the next decade. Digitisation and smart specialisation feature across policy domains as enablers of innovation and as offering means through which public service delivery can be enhanced. Society's ability to avail of the associated opportunities is contingent on improving digital literacy. Thus, stakeholders in Carlow envisage investments in hard infrastructure and soft supports – training and capacity-building – as the county strives to avail of the economic, human resource and service delivery opportunities associated with smart technologies and our obligations in respect of environmental protection.

The forthcoming Common Agricultural Policy (CAP) will have a significant impact on County Carlow, given the importance of the rural economy. The CAP endeavours to support farmers in continuing to produce high-quality food, while protecting the natural resources on which sustainable food production is contingent. This can be challenging, particularly for dairy and beef farmers, and the entire food industry will need to be particularly innovative and adaptive over the next decade. The

CAP provides funding and strategic signposts for LEADER, and the implementation of the next iteration of LEADER (2023-2027) will parallel the rollout of the LECP.

As illustrated in the diagram (presented earlier), the national-level policies that shape and relate to the County Carlow LECP are nested within the UN and EU frameworks, and there are several complementary, shared and over-lapping principles and provisions. In response to the COVID-19 pandemic, and in order to enable societies to recover from its adverse effects, each EU member state has prepared a recovery and resilience plan, and their implementation is being enabled by EU and Exchequer funds. The plans' six pillars resonate with the UNSDGs, and they provide a set of reference points for stakeholders implementing the Carlow LECP. The pillars are:

- Green transition;
- Digital transformation;
- Smart, sustainable and inclusive growth;
- Social and territorial cohesion;
- Health, economic, social and institutional resilience; and
- Policies for the next generation.

Ireland's National Recovery and Resilience Plan has three over-arching and inter-locking priorities as follows:

- Advancing the green transition;
- Accelerating and expanding digital reforms and transformation; and
- Social and economic recovery and job creation.

These strategic priorities embrace and give effect to the aforementioned over-arching EU policy trajectory, and the rollout of associated projects is impacting on firms, institutions and communities in Carlow. While the National Recovery and Resilience Plan is primarily about delivering strategic actions, it also commits to structural reforms. These include adjustments to the carbon tax base, addressing the digital divide, reducing regulatory barriers to entrepreneurship, pension reform, increasing the provision of social housing and progressing the implementation of Sláintecare. These policy domains have direct and indirect bearings on the implementation of the County Carlow LECP, and it will be important for stakeholders to be mindful of their consequences, particularly for vulnerable groups. Stakeholders will also need to be proactive in ensuring that firms, institutions and communities in Carlow avail of the opportunities that flow from the plan's implementation and the structural and legislative reforms that are expected to accompany it.

National Policies and Frameworks – their interfaces with EU frameworks and local relevance

Since June 2021, the State has been driving Ireland's National Recovery Plan – seeking to support the resumption of economic activity (post COVID), and this plan focuses on the following: ensuring sustainable public finances; helping people back to work; rebuilding sustainable enterprises; and a balanced and inclusive recovery. While the main imperatives relate to economic re-adjustments, the plan recognises the importance of investing in education, training and social inclusion, among other domains, in order to enable and sustain economic development.

There are several national-level sectoral and inter-sectoral policies that relate to the formulation and implementation of the Carlow LECP. Housing for All – a new housing plan for Ireland provides for

significant investment in the construction of housing, and it behoves stakeholders in Carlow to avail of the associated opportunities and to work collaboratively in enabling place-making and community development. The LECP has the potential to provide tools to enable the construction of communities and social supports – that are necessary to accompany any investment in physical infrastructure.

Ireland’s current rural development policy presents opportunities for sectoral interests in areas such as tourism, the social economy and digitisation, and its provisions in respect of remote working tally with, and accentuate, the provisions in other policies – thereby opening-up possibilities for transformative projects that would benefit rural economies, address rural decline and improve people’s health and quality of life.



Figure 5: Implementation pathways from Housing for All – A New Housing Plan for Ireland

At EU and national level, there are a number of policies and programmes in place to support particular population cohorts including young people, those with disabilities, migrants and older people, all of which are relevant to the Carlow LECP. Some are already reflected in, and given effect by, local-level strategies and initiatives in County Carlow, including the age-friendly strategy, children and young people’s services committee plan and migrant integration and inter-cultural strategy. Over the course of the LECP (2023-2028) organisations will continue to implement these strategies, and some of them will come up for review and renewal within this timeframe. Their renewal will provide opportunities for maximising complementarity and the alignment of strategic objectives with one another and with respect to the priorities outlined by the Irish Human Rights and Equality Commission namely economic equality; justice; respect and recognition and futureproofing.

Furthering Complementarity and Sustainability

Spatial planning and place-making are integral to the policy frameworks referenced here – in terms of ensuring they have positive impacts at county and community levels. Thus, Project Ireland 2040 – Ireland’s National Development Plan has been aligned with Ireland’s National Planning Framework, and the State has clear targets and timeframes in respect of promoting balanced regional and territorial development. These targets are operationalised through three regional spatial and economic strategies (RSESs) and the RSES for the Sothern Region provides the frame of reference and parameters for the Carlow County Development Plan (2022-2028). The County Development Plan

governs land use, and it guides the development of infrastructure in County Carlow for the entire period of the LECP. Thus, there is a need for complementarity in respect of both strategies. The County Development Plan also includes provisions for environmental protection, the development of housing, the provision of connectivity, cultural resource development and quality of life. It impacts on all sectors of the economy, and while it regulates activities, the plan can be a significant enabler and stimulant of initiative across all sectors.

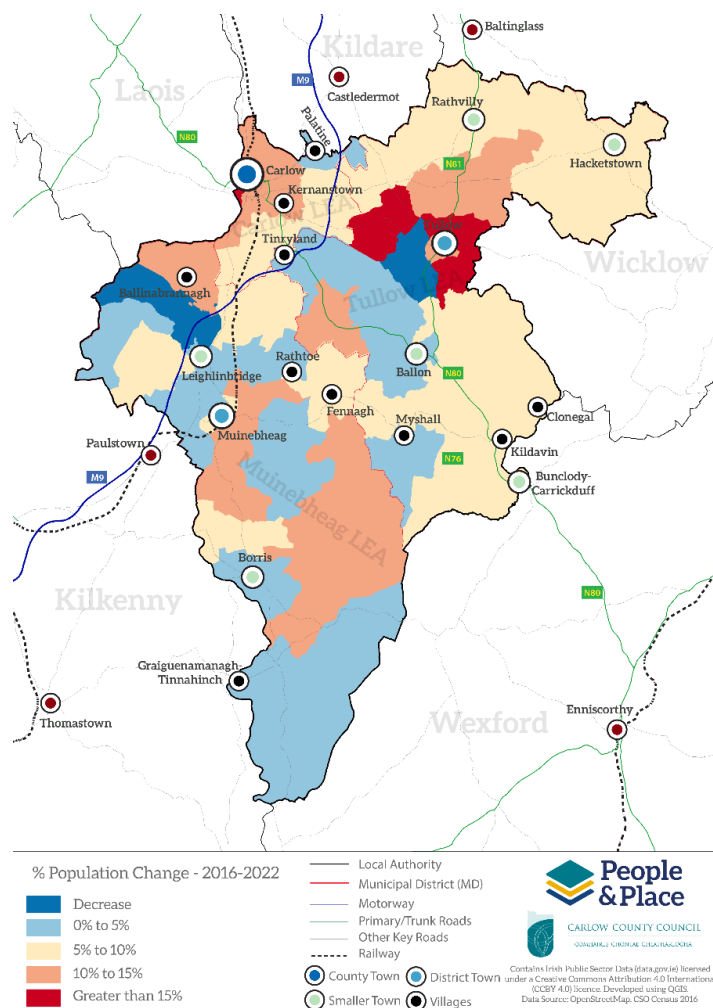


Figure 6: National, Regional and Local Plans for Carlow County Council

The seventeenth of the UNSDGs is entitled ‘partnership for the goals’. On a global scale, this goal implies partnership between and across the Global North and Global South along and between governments and statutory bodies. It also implies capacity-building along with knowledge and technical transfers. Collaborations involve supranational bodies and governments, and they also involve the private sector and civil society. Indeed, civil society has been proactive in promoting linkages and solidarity between communities and citizens in Ireland / Europe and in the Global South. There is scope for County Carlow to further play its part in promoting solidarity with communities across the Globe – through, for example, the Fair-Trade towns, and the responsible sourcing of goods and services. Moreover, the partnership principles that underpin UNSDG 17 are transferable to the ways in which the LECP can be delivered – based on inter-agency and inter-sectoral collaboration, a fusion and integration of economic, socio-cultural and ecological objectives and a commitment to good governance.

Socio-Economic Highlights

In terms of its surface area (897 km²), Carlow is the second-smallest county in Ireland. The county has a population (2022 Census of Population) of 61,931. This is the third lowest of the counties in the State; Leitrim and Longford have smaller populations. The population of Carlow has increased by 8.8% since 2016 (+4,999), the ninth highest of all local authorities in Ireland. The recent population growth has been primarily driven by net in-migration to the county (56% of population growth) i.e., people moving into the county from elsewhere in Ireland and from abroad.



Map 1: Percentage Population Change in Carlow, 2016-2022

In the wider European context however, Carlow is a medium-sized local authority, as Ireland has, in demographic terms, the second-largest local authorities among EU member states. Smaller local authorities are generally associated with higher levels of subsidiarity and reduced distances between citizens and decision-makers. Smaller-scale local authority areas also tend to be characterized by higher levels of inter-agency interfacing, networking and collaboration, and it is envisaged that those involved in the Carlow LECP, as well as other local stakeholders, will utilise this socio-economic summary to optimise their work – individually and collectively over the coming years.

The demographic and socio-economic summary data presented here demonstrate that, despite its scale, and notwithstanding its relative topographical homogeneity, Carlow exhibits some notable

internal variety, and micro-level geographies are important in responding to the county's needs and in enabling it to develop to its full potential. The data presented here also show relationships between several variables, thus underscoring the merits of collaborative and partnership approaches, as enabled and promoted by the LECP and wider stakeholders.

A more detailed socio-demographic report containing a wide range of maps and graphs is also available to download on the [Consult Carlow](#) website.

Key Socio-Economic Highlights

Demographics / Population

- According to the most recent (2022) preliminary Census of Population returns, County Carlow:
 - has a total population of 61,931; and
 - experienced an increase in population of 8.8% – the ninth highest among the 31 local authority areas.
- Recent population growth has been most pronounced in and around Carlow Town and Tullow;
- Net in-migration is the primary driver of population growth;
- County Carlow's population is projected to increase by 19.4% between 2021 and 2040 – the second highest rate of increase of any county (DPHLG ESRI projections);
- The county's population is also expected to age over the next twenty years and beyond;
- Over a third of the population is aged 0-24 years; values are 33.2% in Ireland and 34.5% in Carlow, and within the county, the highest rates of young people (among the resident population) are generally in the north of the county; and
- Over one in eight persons is aged 65+ (12.9%, compared with 13.4% across the State), and the highest values are generally in rural areas and in the south of the county.

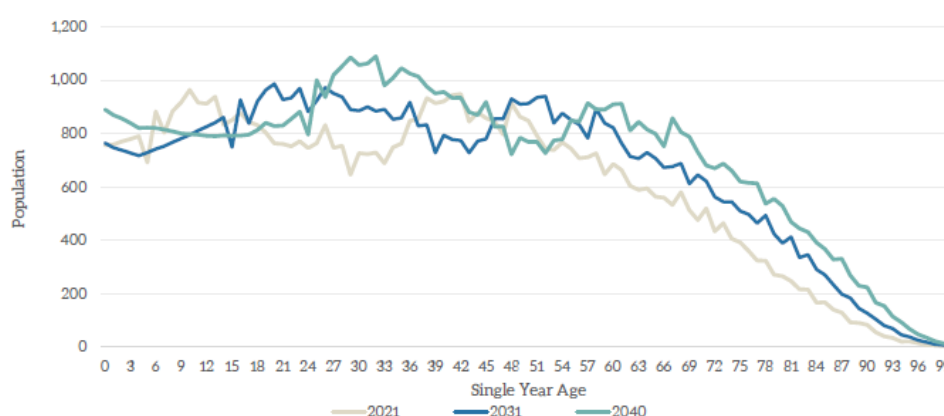
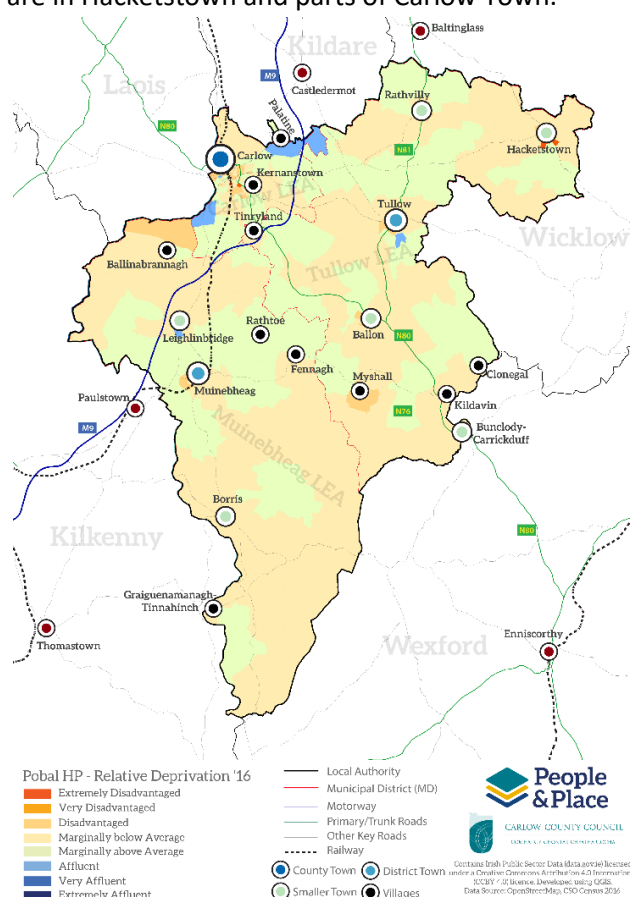


Figure 7: Projected Population Change, 2021 to 2040 by single year of age (ESRI - Baseline)

Social Variables¹

- Over ten percent (10.5%) of County Carlow's resident population has a nationality other than Irish. The corresponding figure for Ireland is 11.4%. Within Co. Carlow, non-Irish nationals are more likely to reside in urban areas (than in rural communities);
- One in five persons who lives in Tullow Town has a nationality other than Irish;
- There are 511 persons who self-declare as an Irish Traveller. They comprise 0.9% of the county's resident population (relative to 0.7% across the State), with the highest numbers being in Bunclody-Carrickduff;
- The Pobal HP Index of Affluence and Deprivation reveals that County Carlow, as a whole, is more disadvantaged than the State. The county registers a score of -3.7 on this index. Within the county, the highest levels of affluence are in the suburbs of Carlow Town and some of the adjoining communities, while the highest levels of disadvantage are in Hacketstown and parts of Carlow Town;
- As of November 2022, County Carlow was home to 778 refugees from Ukraine of the 58,829 who have come to Ireland. Within the county, the greatest numbers are in Carlow Town; and Just over one in five (20.5%) families with children is headed by a lone parent – half a percentage point above the proportion across the State, and the highest proportions of lone parent families are in Hacketstown and parts of Carlow Town.



Map 2: Relative Deprivation Score, 2016 (Pobal HP Deprivation Index)

¹ The figures presented here are based on the 2016 Census of Population return, as the 2022 figures will not be available until mid-2023.

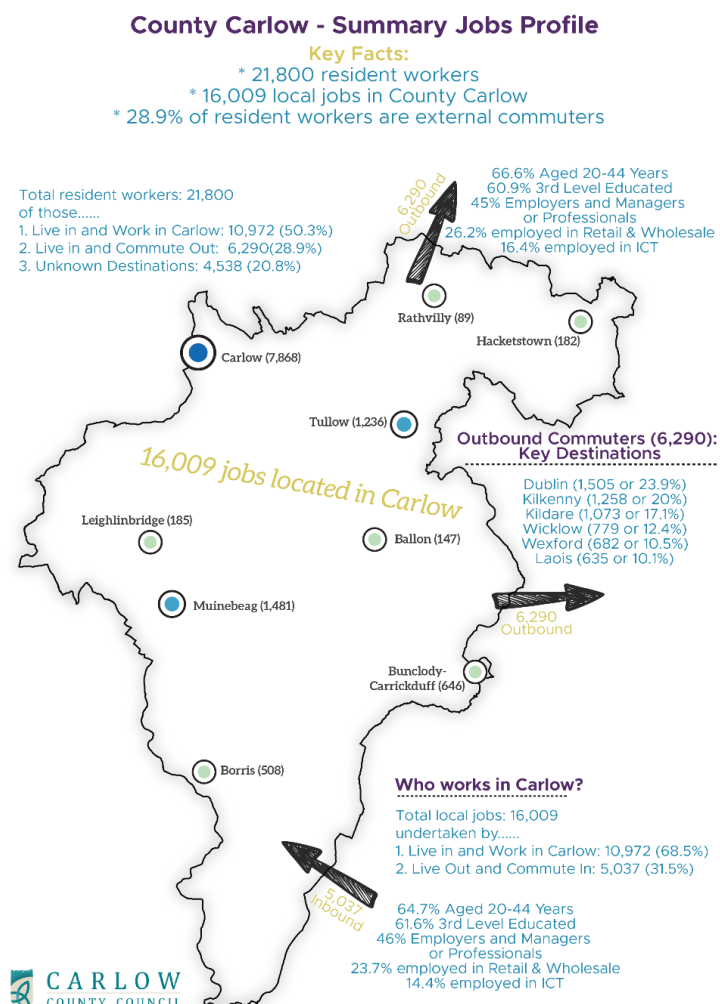
Education

- Levels of educational attainment, among County Carlow's resident population, are slightly lower than is the case across Ireland as a whole. The proportion of persons whose formal education finished prior to the leaving certificate (or international equivalent) is four percentage points higher than is the case in the State;
- In Ireland, 33.4% of the population has a third-level qualification, while in County Carlow, the corresponding figure is almost seven percentage points lower at 26.5%;
- Among County Carlow's 42 primary schools, 6 (14%) have DEIS status – this is lower than the proportion across the State;
- Among County Carlow's 11 post-primary schools, 2 (18%) have DEIS status – this is lower than the proportion across the State and the tenth lowest among the State's 31 local authority areas;
- The pupil – teacher ratio in County Carlow is the sixth highest among the 31 local authority areas; and
- Average weekly childcare fees are lower in County Carlow than in all other local authority areas.

Economics and Employment

- Carlow's Core Economic Area (30-minute drivetime from Carlow Town) had a population of just under 109,000 in 2016. Both the Core Economic Area and the Functional Area (45-minute drivetime from Carlow Town) are experiencing high levels of population growth.
- Carlow's labour force participation rate has increased since 2011, but it continues to lag behind the rate for the State as a whole;
- The proportion of the labour force classified as being 'at work' is four percentage points (83%) below the corresponding value for the State;
- Labour force participation rates are highest in rural areas around Tullow;
- Over a quarter (29%) of the workforce commutes to work outside the county, with Kilkenny and Dublin being the main destinations;
- Relative to those who live and work in County Carlow, outbound commuters are more likely to have a third-level qualification, work in service industries and belong to the higher socio-economic groups;
- There are 16,009 jobs and 21,800 resident workers in County Carlow; thus the county's jobs to workers ratio stands at 73:100;
- Almost half the jobs in County Carlow are in Carlow Town (n=7,868);
- 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.
- Commerce & trade and professional services account for almost half of the jobs held by County Carlow's resident workers, but agriculture and manufacturing are more significant in Carlow than is the case for Ireland as a whole;
- Agricultural employment is particularly significant in the south of the county;
- Employment in professional services, commerce & trade and the public sector is most prevalent in and around the main towns (most notably Carlow and Tullow) and rural communities in North Carlow that have high levels of outbound commuting;

- There are 4,512 persons (2021 data) employed in State-assisted foreign and indigenous firms in County Carlow;
- In 2021, the Carlow Local Enterprise Office (LEO) supported 203 clients, and these provide 1,015 jobs;
- While the regional unemployment rate has been declining since 2016, the rate of decline is slower than is the case across the State as a whole;
- Within County Carlow, the highest rates of unemployment are in urban areas and in Hacketstown;
- Median gross household income in County Carlow is over €5,000 below the level for the State as a whole;
- The proportion of households who derive the majority of their income from social welfare (18.6%) is the third highest among the 31 local authority areas; and
- Among those who live in rented accommodation an average of 26.3% of household income is expended on rent.



Map 3: Summary Jobs Profile, 2016 (CSO, POWCAR)

Health and Disability

- Although Carlow has a younger age profile than the State, it has a higher proportion of persons with a self-declared disability;
- The county's profile in respect of self-declared health status is similar to that of the State; and
- Relative to the State, Carlow performs better in respect of cancer screening participation, MMR vaccination uptake, (freedom from) radon and air quality, but it performs worse in respect of other health-related indicators such as cancer incidents, sedentary lifestyles and GP access.

Housing

- There were 252 housing completions, in County Carlow, in 2021 – an increase on pre-pandemic levels;
- There are 1,772 vacant homes in County Carlow (2022 data);
- County Carlow's profile, in respect of housing tenure, is similar to that of the State;
- The average sale price of a residential property in County Carlow, in August 2022, was €231,308, which is more than €100,000 below the State average;
- Approximately one in seven households is renting from a private landlord, while one in nine is renting from the local authority or an approved housing body, and both these figures have increased consistently over recent years;
- One fifth of those in the private rental sector are in receipt of the housing assistance payment (HAP) – with the highest concentrations being in Carlow Town and its environs; and
- Rental costs have been increasing year-on-year and stood at €977/ month in Q1 2022.

The Natural Environment

- Carlow's main river systems – the Barrow and the Slaney and several of their tributaries – and most of the Blackstairs Mountain Range are designated Natura 2000 sites;
- At present, there is one operational solar farm in the county, and a further four are planned;
- Residential heat demand per capita, in Carlow, is similar to the median level across the State's local authority areas, while heat demand across all sectors is in line with the size of the county;
- One in seven new vehicles registered in 2021 was either an electric or hybrid model; and
- Almost half the waste collected (in 2020) from homes was residual (black bin), which is nine percentage points more than was the case across the State.

Agriculture

- The median standard output (in Euro) in County Carlow is almost twice that of the State, and the fifth highest of the 26 counties;
- Almost one in seven farms (mostly in the north and east), in County Carlow, is a specialist-tillage farm, while almost one in six (mostly in the south) is a specialist sheep-farm;
- One third of farms in Carlow specialise in beef production; and
- The largest farms (in terms of surface area) are predominantly in the centre and north of the county, while upland farms (in the Blackstairs) are generally the smallest.

Socio-Economic SCOT Analysis

This section identifies key Strengths, Constraints, Opportunities and Threats (SCOT) relevant to the development of Carlow over the next decade. This has been prepared following the development of a detailed socio-economic analysis of the county, a review of recently published documents and strategies (County Development Plan, Economic Development & Business Support Strategy, Tourism Strategy) and an analysis of the last LECP for Carlow. It has also been supplemented through feedback and comments received from the Carlow LECP Advisory team.

Theme	Strengths
Social	County-level strategies in place that give effect to EU and national policies e.g. climate change, migrant integration and inter-culturalism
Social	Geographical size of Carlow – a small county with the 3rd lowest population in the country (2022 population = 61,931)
Social	Strong volunteerism in communities
Social	A diverse and increasingly multi-cultural community
Social	Vibrant arts and cultural organisations and good performance spaces
Economic	Strong industry clusters throughout county – Financial Services/Fin-Tech, ICT and Engineering
Economic	Carlow's geographic location, with ease of access to Dublin, the Midlands and the South-East Region (potential talent pool)
Economic	Strong Transport Connections – through rail and road connections
Economic	Two Institutions of Higher Education and the development of the Technological University of the South East & Carlow College – talent availability and R&D potential
Economic	Cost of living is relatively low (housing, childcare etc)
Environmental/Heritage	A stock of natural and cultural resources, including heritage sites of national significance
Environmental/Heritage	A strong agricultural sector that is the bedrock of several food-processors and service industries
Environmental/Heritage	Natural beauty and its tourism potential – River Barrow and Mount Leinster (Blackstairs)

Theme	Challenges
Social	Large parts of the county classed as disadvantaged with relative rate below both State and regional scores
Social	Isolation in rural communities
Social	Vacant property issue within town centres
Social	High proportion of households dependent on social welfare payments as main source of income (18.6%)
Social	Relatively low levels of educational attainment
Economic	A lack of scale up space and landing / start up accommodation
Economic	Relatively low level of FDI investment and supported jobs
Economic	Brexit-related pressures on indigenous manufacturing industries
Economic	Linkages between indigenous firms and education sector could be stronger
Economic	The retention of students post-graduation (graduate brain drain)
Economic	Poor connectivity outside of the main M9/N9 artery – resulting in uneven economic growth and over-reliance car-based commuting
Economic	Persistent and inter-generational unemployment and socio-economic disadvantage in certain communities
Environmental/Heritage	High levels of reliance on private transportation – causing excessive greenhouse gas emissions
Environmental/Heritage	Rail line (Dublin-Waterford) is only single track and Carlow Train Station has capacity limitations; thus public transport provision and uptake are delimited, leading to environmental degradation
Environmental/Heritage	High levels of septic tanks in rural areas and some villages not fully connected to the wastewater treatment networks
Environmental/Heritage	Poor access to, and interpretation of, heritage and cultural sites
Environmental/Heritage	Environmental resources and their significance can be overlooked in favour of other parts of the South-East Region

Theme	Opportunities
Social	Increased visibility and use of the Irish language, particularly in Carlow Town
Social	Inter-county collaboration across the South-East Region – generation of critical mass
Social	Carlow's growing population – population increasing by 8.8% since 2016.
Social	Carlow's population growth will be one of the highest in the country and is expected to increase by +19.4% by 2041).
Social	Improved skill profile through the development of the Technological University
Economic	Potential development & enhancement of enterprise hubs building on Carlow's Quality of Life excellence
Economic	Improving the outward brand of Carlow to enhance Carlow's reputation and visibility to international and domestic investors/visitors
Economic	Increased potential for industry links with SETU and Educational Sector
Economic	The development of a distribution hub, utilising the convenience of Carlow's location to Dublin, etc.
Economic	Improved ICT connectivity
Environmental/Heritage	Post-COVID valorisation of green and open spaces and access to the countryside
Environmental/Heritage	Potential linking to Ireland's Ancient East brand – garden, heritage and archaeological trails
Environmental/Heritage	Blueway potential of the rivers; kayaking, boating, canoeing, cycling track along the Barrow
Environmental/Heritage	Development of walking products; Carlow Camino, link with circular routes
Environmental/Heritage	Harnessing young people's awareness of the significance of natural resources and their commitment to local-level action
Environmental/Heritage	Building-on and expanding the existing exemplars of good environmental practices, throughout the county e.g. high-nature value farming combined with rural tourism, farmers' markets and gardens (e.g. An Gairdín Beo)

Theme	Threats
Social	An aging population with large increases in population aged 65+ in coming decades
Social	Rapidly increasing level of rental prices
Social	An older (less ecological) housing stock in many rural communities
Social	A perception among some newcomers that they are transient – aspiring to live in Dublin
Social	Availability of ‘suitably skilled’ apprenticeships across the county and beyond
Economic	Export knowledge and key market development knowledge of SME firms
Economic	The slow roll out of broadband provision across the county
Economic	Retention of talent, given convenience to Dublin
Economic	Tourism requires development of economics enablers based on sustainable experiences
Environmental/Heritage	Environmental Pollution – especially groundwater
Environmental/Heritage	With climate projections showing an increase in rainfall for winter, a decrease in rainfall for summer combined with an overall seasonal increase in average annual temperatures clearly highlight the need to reduce the impacts that climate change is having on the environment, the economy and the citizens of County Carlow
Environmental/Heritage	Pressures on farmers to continue to produce large / increased volumes of food, although industrial agriculture is harming public health and the natural environment
Environmental/Heritage	Exposure to the vagrancies of global patterns e.g. climate change and demands for commodities such as milk (leading to monoculture and a lack of biodiversity)
Environmental/Heritage	An increase in part-time farming, such that farmers are not on site (on farms) to maintain and support ecosystems
Environmental/Heritage	Decaying built heritage in some of our town and village centres
Environmental/Heritage	Pressure on unlisted historical buildings / sites / monuments associated with the demand for home-building

Draft Vision and High-Level Goals (HLGs)

The approach taken to the development of the LECP was to build a socio-economic profile of Carlow looking at the social, economic and environmental data for the county. The LECP also takes account of key policies at local, national and European level. Based on the socio-economic profile and in the context of the current and evolving policy frameworks, a SCOT analysis was undertaken, for Carlow, and this assisted in the drafting of a new vision and set of high-level goals, for Carlow, as follows:

Carlow is committed to a just and sustainable future, with inclusive and resilient communities and thriving and innovative enterprises supported by responsive institutions, working together to support the social, cultural, economic and environmental well-being of all.

In order to realise this vision, the LECP (2023-2028) aims to support and empower civil society, enhance local service provision, maximise self-actualisation opportunities for all, create conditions that stimulate and foster innovation and entrepreneurship, enable good governance – with open and inclusive decision-making and systemic evaluation – and ensure the conservation, protection and valorisation of natural and heritage resources.

To successfully attain our vision for Carlow over the coming years, we will set ourselves a series of environmentally sustainable and progressive socio-economic high-level goals. Each high-level goal presents a vision of the future that we, Carlow County Council, our stakeholders and the citizens of Carlow, plan and commit to achieve.

Draft Carlow LECP High Level Goals (HLGs)	
HLG 1	Carlow is a low-carbon and climate-resilient society - with affirmative climate and biodiversity action and environmental sustainability at the heart of all decision-making.
HLG 2	Vibrant, sustainable communities are enabled through active community development and participative democracy.
HLG 3	Our communities are culturally enriched, integrated and inclusive.
HLG 4	Life-long education and learning opportunities are available and accessible to all.
HLG 5	Our towns and villages are thriving - with a focus on sustainable place-making, collaboration, liveability and enterprise development, supported by creativity, entrepreneurship and inward investment.
HLG 6	High quality employment is provided by innovative, creative, smart, adaptable and connected businesses, in tourism development and all other sectors.

Socio-Economic Statement prepared by:

People & Place Limited

Collaborative and evidence informed decision making for
social, economic and community development.
We analyse, inform and monitor.

W: <https://peopleandplace.ie>
E: info@peopleandplace.ie

Ennis Chamber I-HUB,
54 O'Connell Street,
Ennis,
Co. Clare



COMHAIRLE CONTAE
CHEATHARLACH
CARLOW COUNTY COUNCIL

