

Big Data for Small Places – Assessing the Outputs and Impacts of Ireland’s National Spatial Strategy on Rural Sub-Regions.

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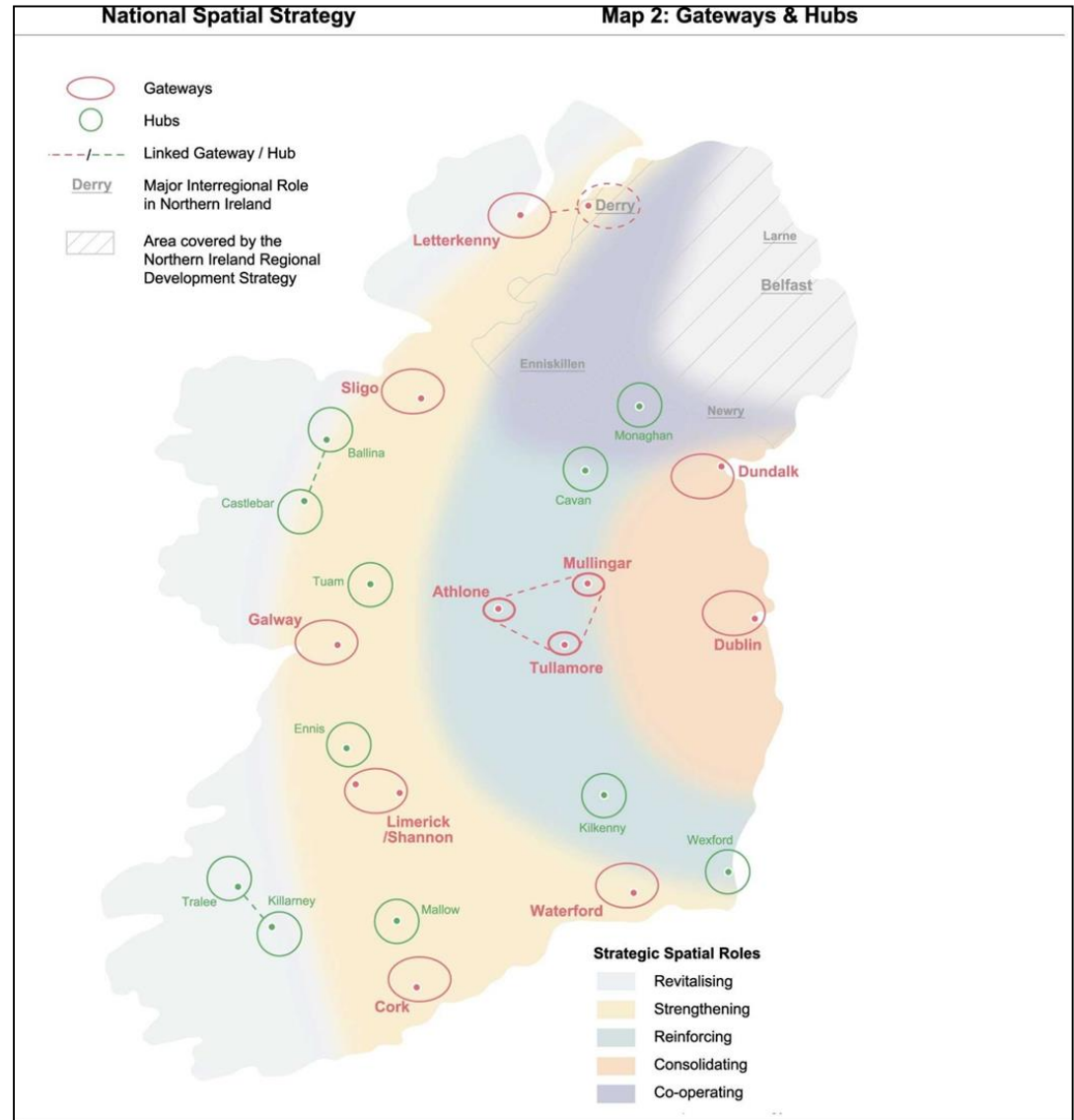
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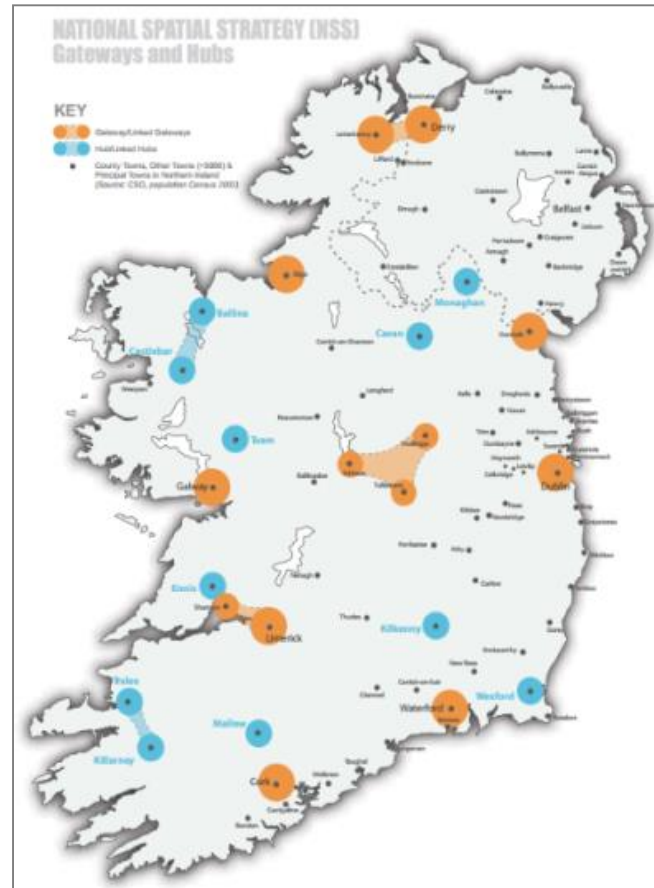
1. The National Spatial Strategy 2002 – 2020

“Balanced Regional Development”

“a counter balance to the Greater Dublin Area”



1a. The NSS - Main Provisions and Framework



Implementing the National Spatial Strategy: 2010 Update and Outlook

**Harnessing Potential,
Delivering Competitiveness,
Achieving Sustainability**

4 October 2010

2015 – 2025: National Planning Framework

2. Outputs and Impacts of the NSS

“The development of governance frameworks that will allow key actors in the gateways to take coordinated and effective action together is, probably, the greatest and most urgent challenge facing the implementation of the NSS.”

National Economic & Social Council:
The Irish economy in the early 21st century (2008)

The NSS gateways “are not championed by their regions in any kind of popular or political way”.

Fitzpatrick & Associates:
Implementing the NSS: Gateway Investment Priorities Study
(Forfás, 2006)

3. Impacts in Rural South West Ireland

3a. Study Methodology

Data Collected from / on:

1. Census of Population
2. The Performance of Agency-Assisted Firms
3. Travel to Work Patterns
4. Investments by Public Sector
5. Local and Community Development

3. Impacts in Rural South West Ireland

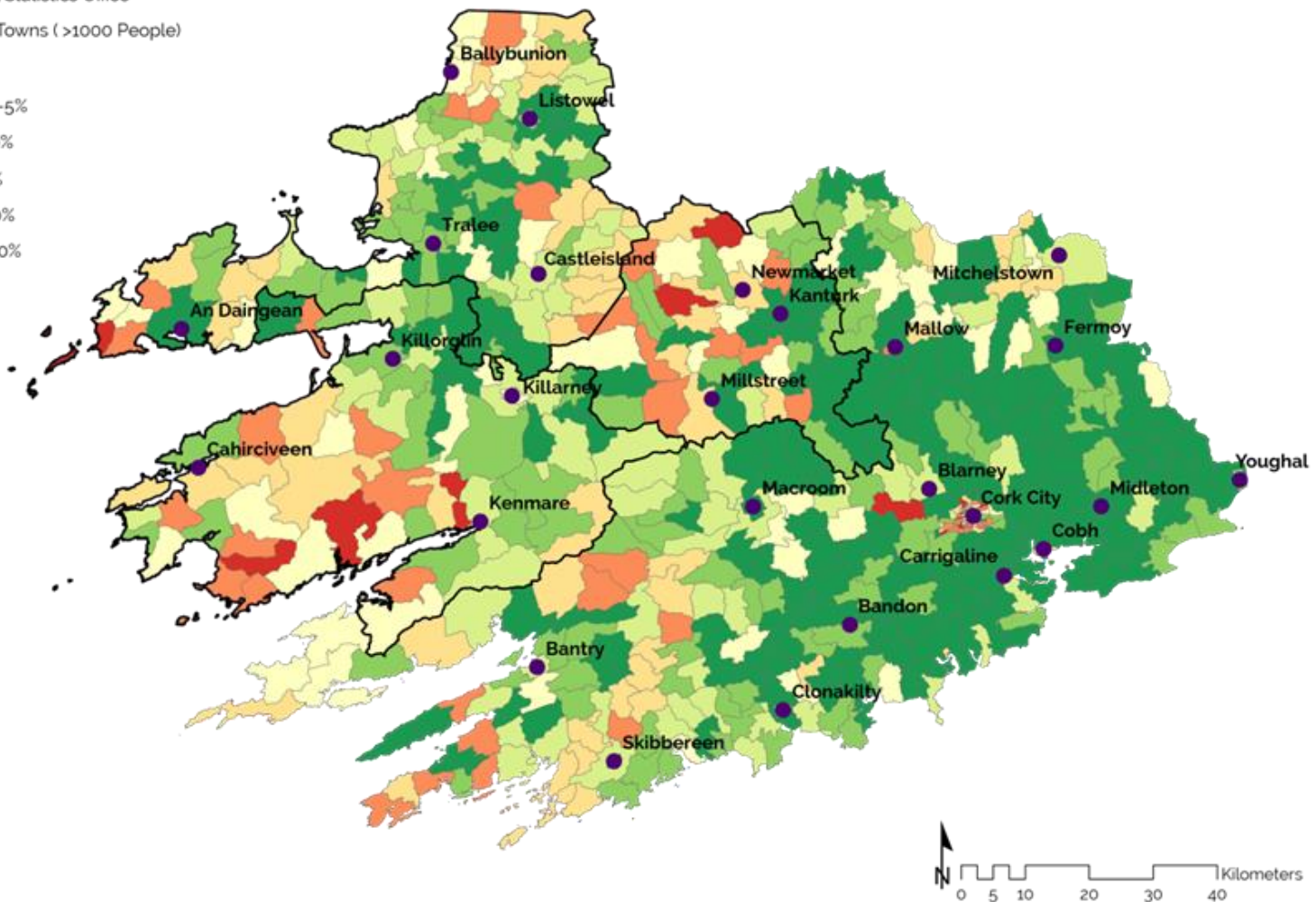
b. Results – mapping the NSS Outputs

Percentage Population Change 2002 - 2011

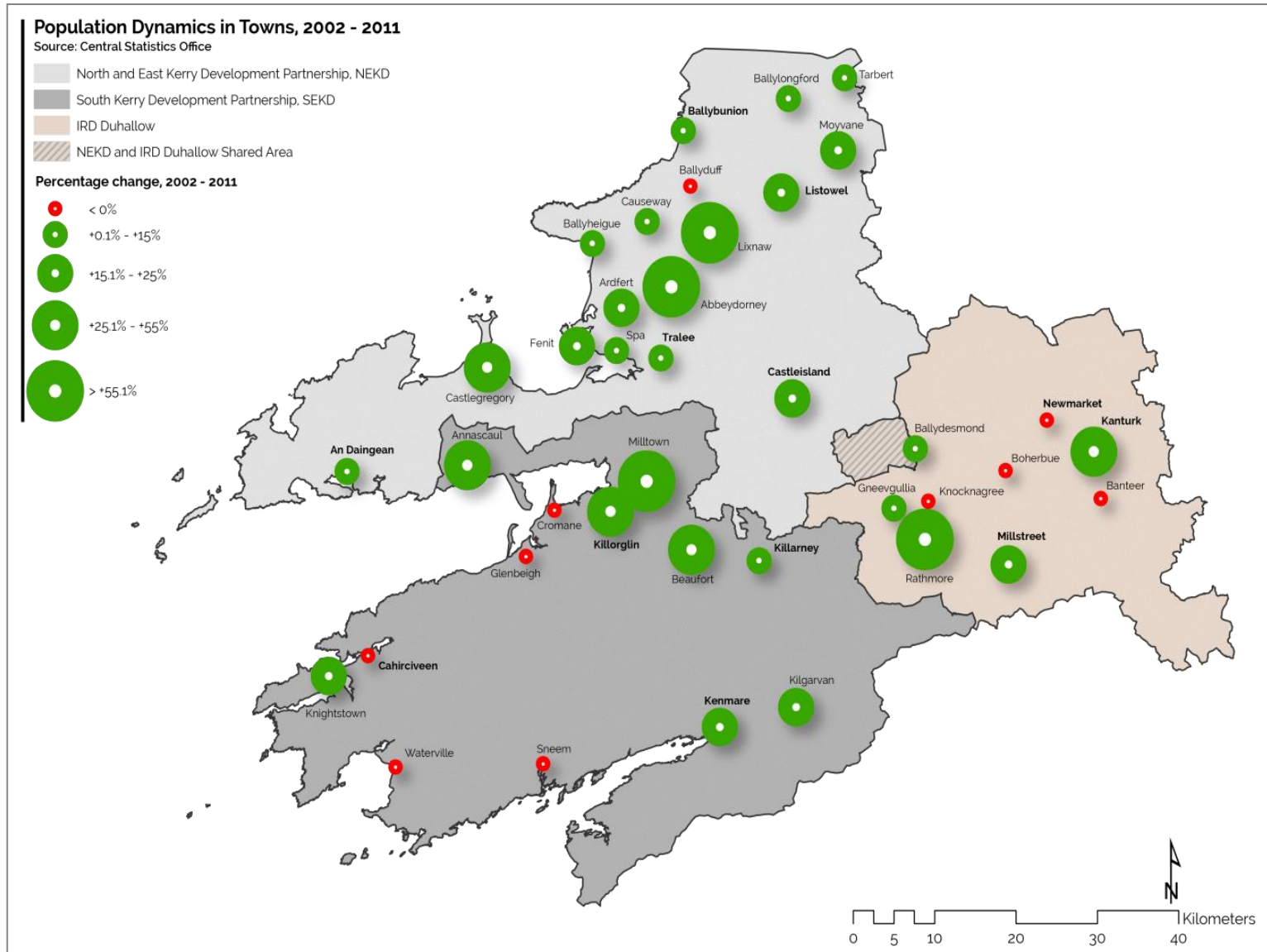
Population -% Change 2002-2011

Source: Central Statistics Office

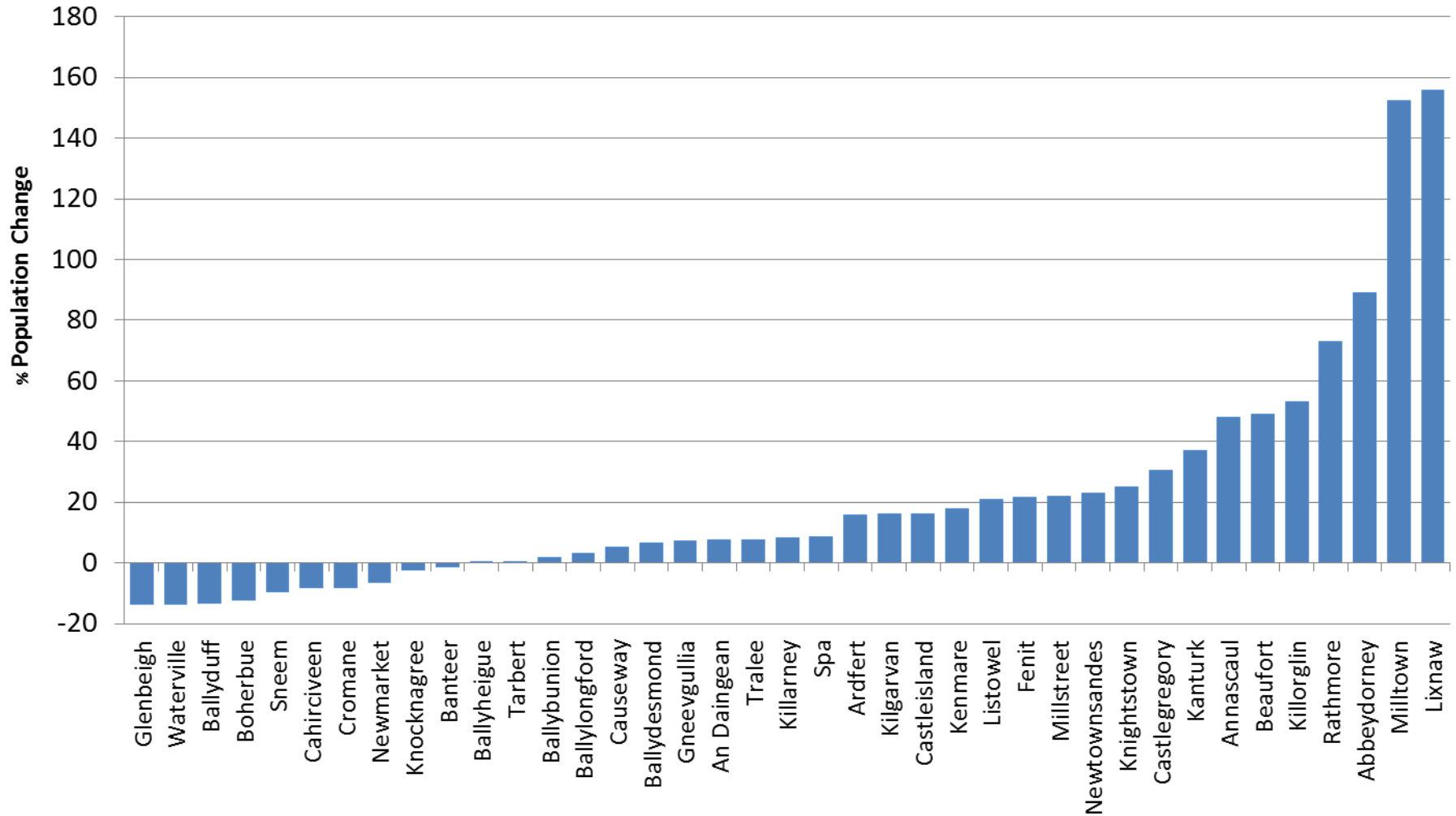
Large Towns (>1000 People)



Percentage Population Change in Towns and Villages in Kerry-Duhallow, 2002-2011



Percentage Population Change in Census Towns and Villages, 2002-2011

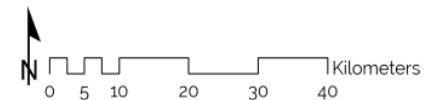
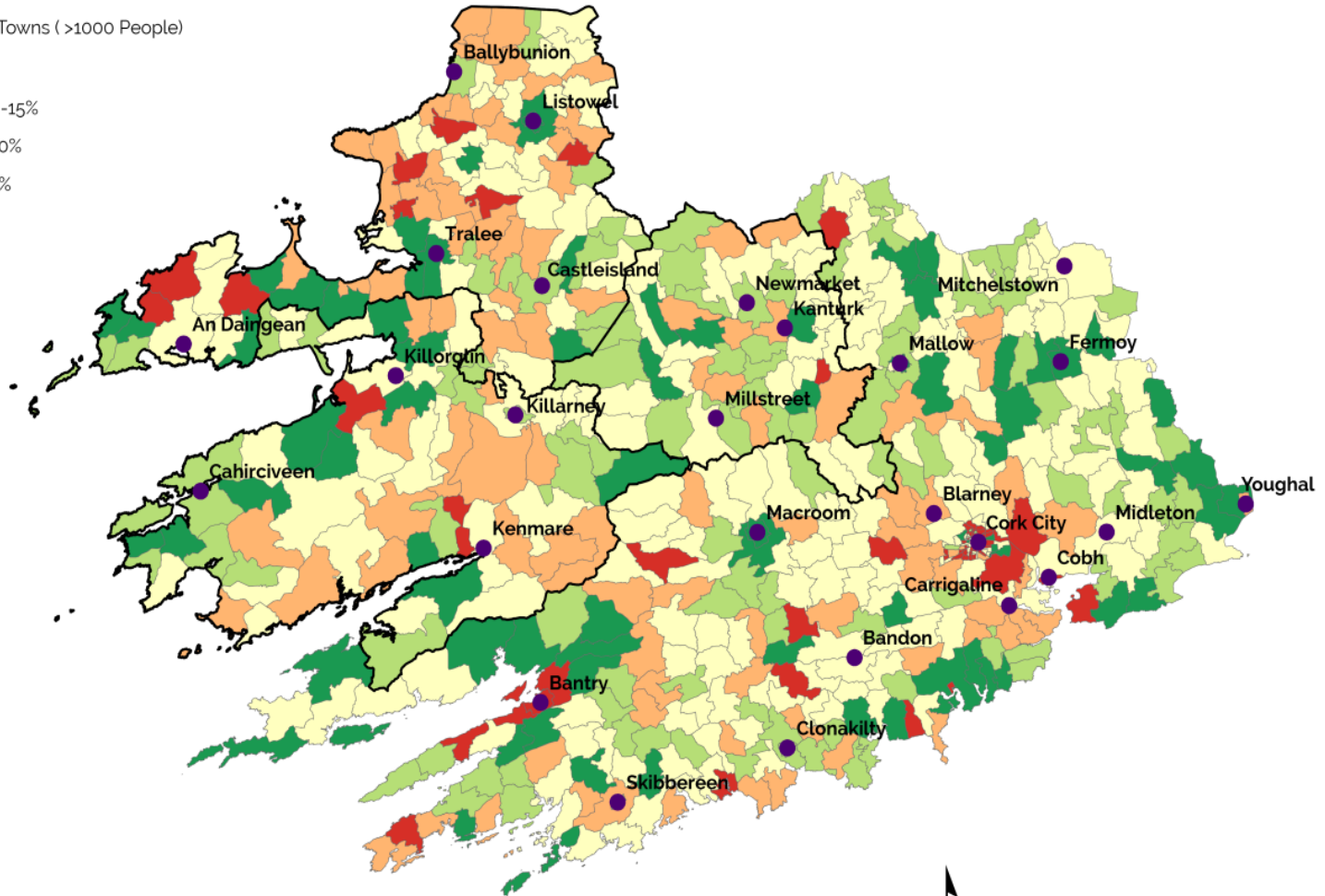
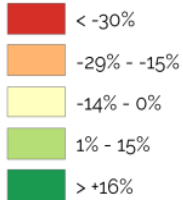


Percentage Change in Persons at Work in Farming, Fishing and Forestry Sectors, 2002-2011

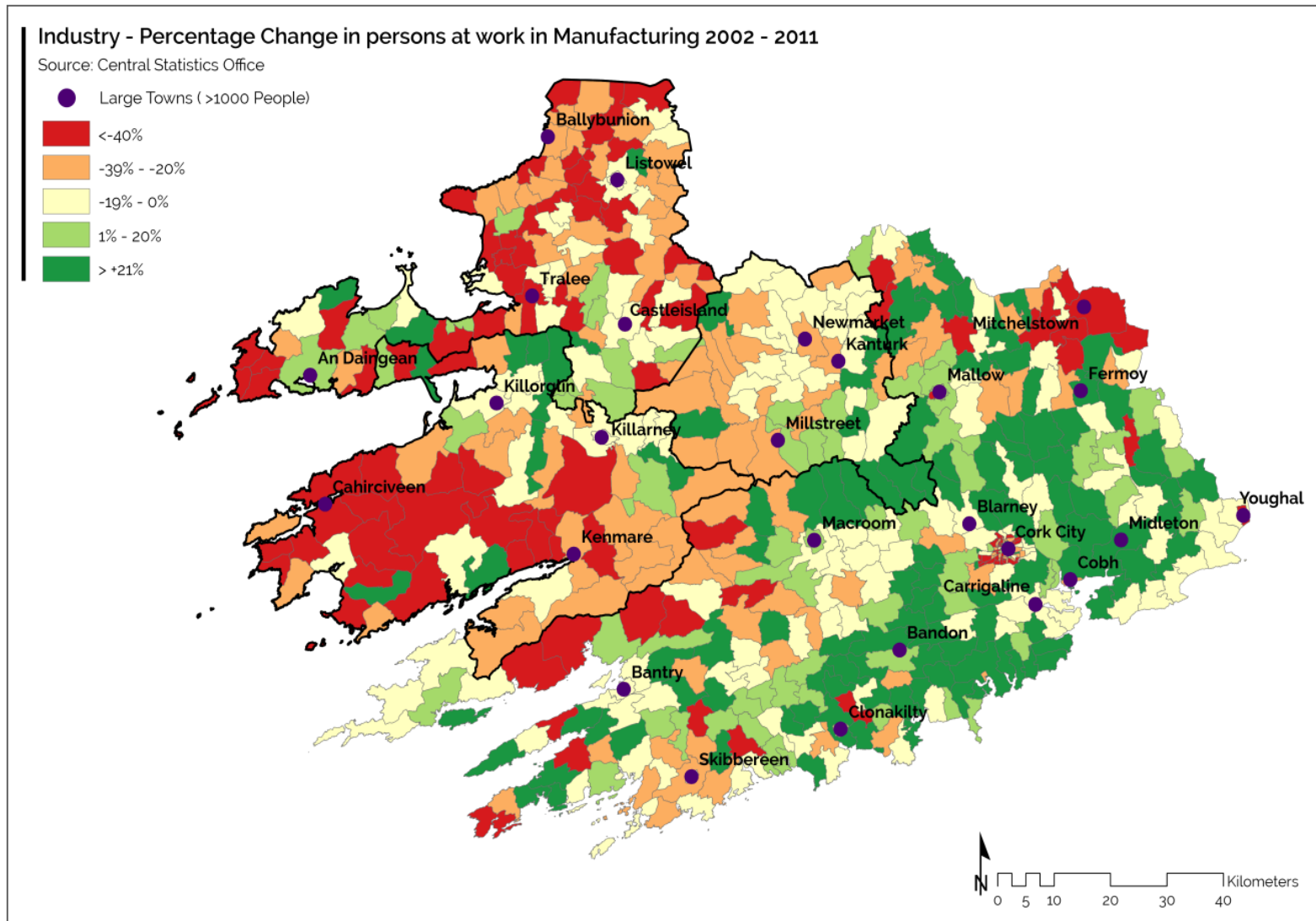
Industry - Percentage Change in persons at work in Farming, fishing and forestry 2002 - 2011

Source: Central Statistics Office

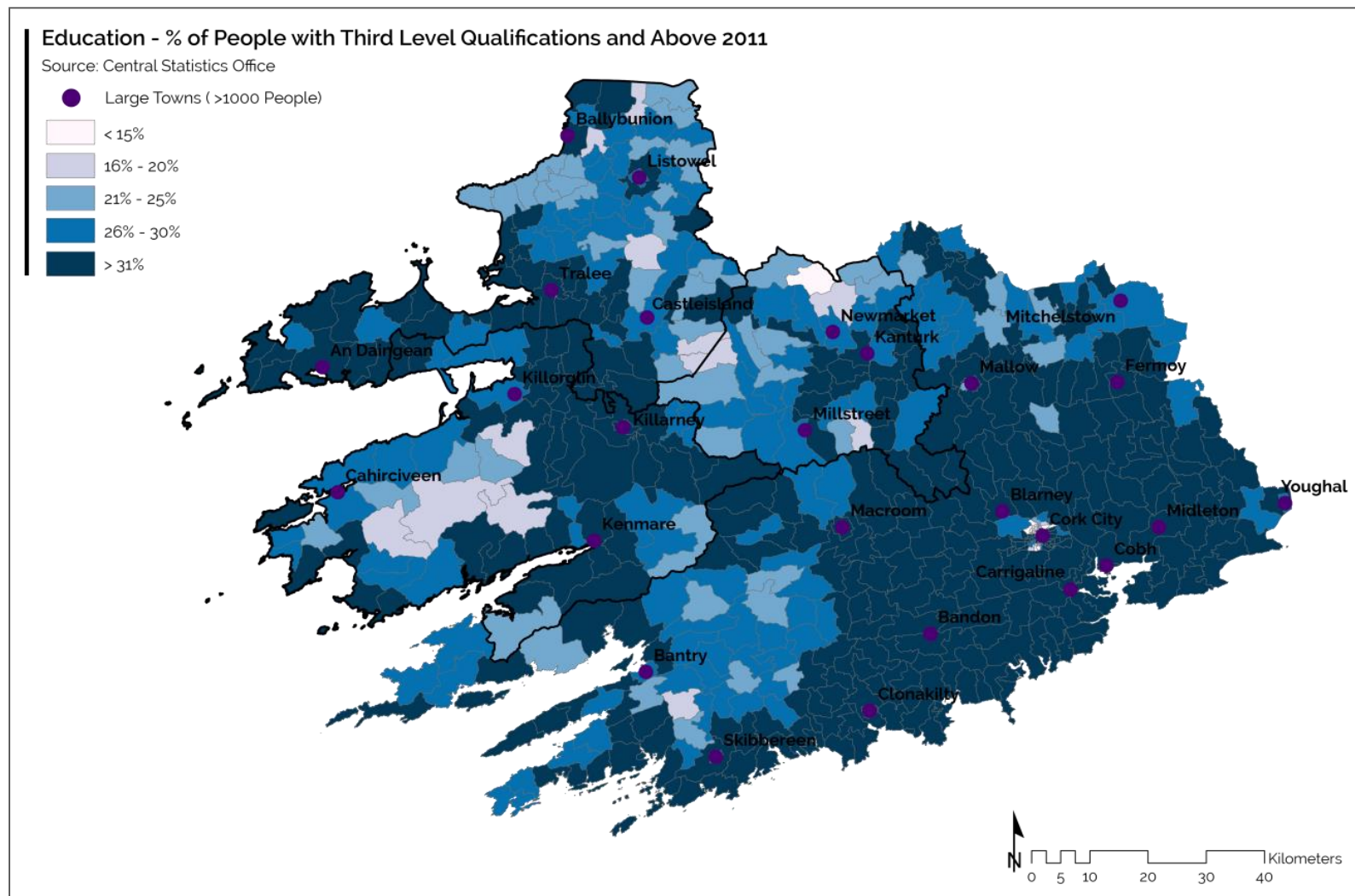
● Large Towns (>1000 People)



Percentage Change in Persons at Work in Manufacturing, 2002-2011



Percentage of Persons with Third Level Qualification and Above, 2011



2. Employment Trends in Assisted Firms 2001-2011, State-Level data

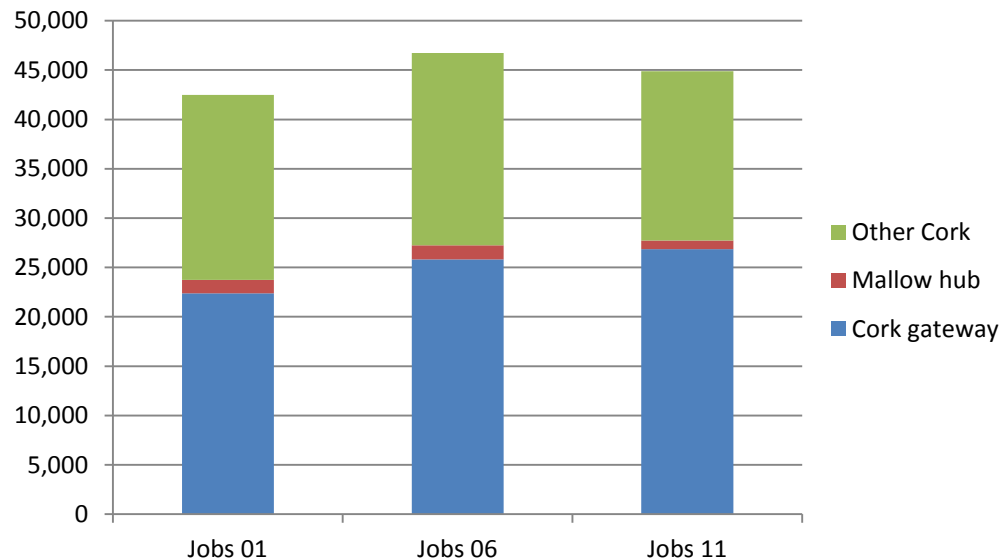
	2001	2006	2011	% Change 01-06	% Change 06-11	% Change 01-11
All employment	343,168	353,909	318,763	3.1	-9.9	-7.1
Employment in Irish-owned firms	166,623	178,386	158,302	7.1	-11.3	-5.0
Employment in Foreign-owned firms	176,545	175,523	160,461	-0.6	-8.6	-9.1
Foreign %	51.4	49.6	50.3	-	-	-

Source: Van Egeraat *et al.* (2012a and 2012b)

Number of Jobs in Firms assisted by Statutory Agencies, 2001 - 2011

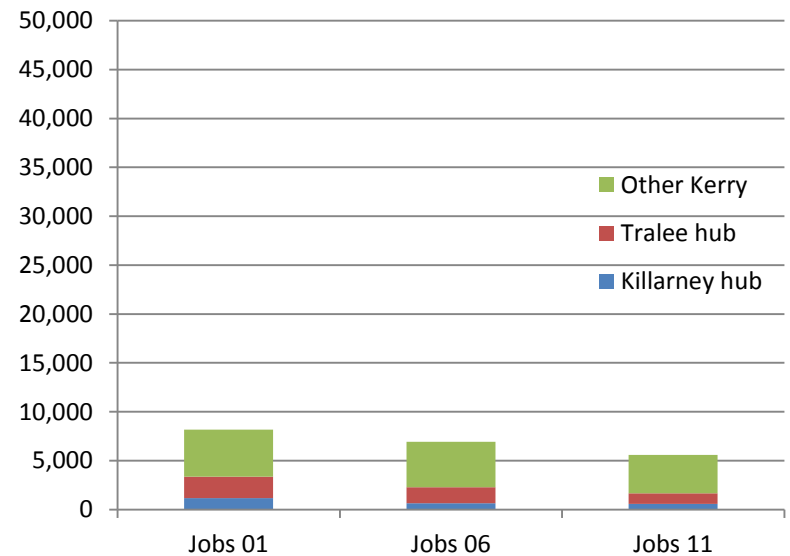
Cork

Number of Jobs in Firms assisted by Statutory Agencies, 2001 to 2011

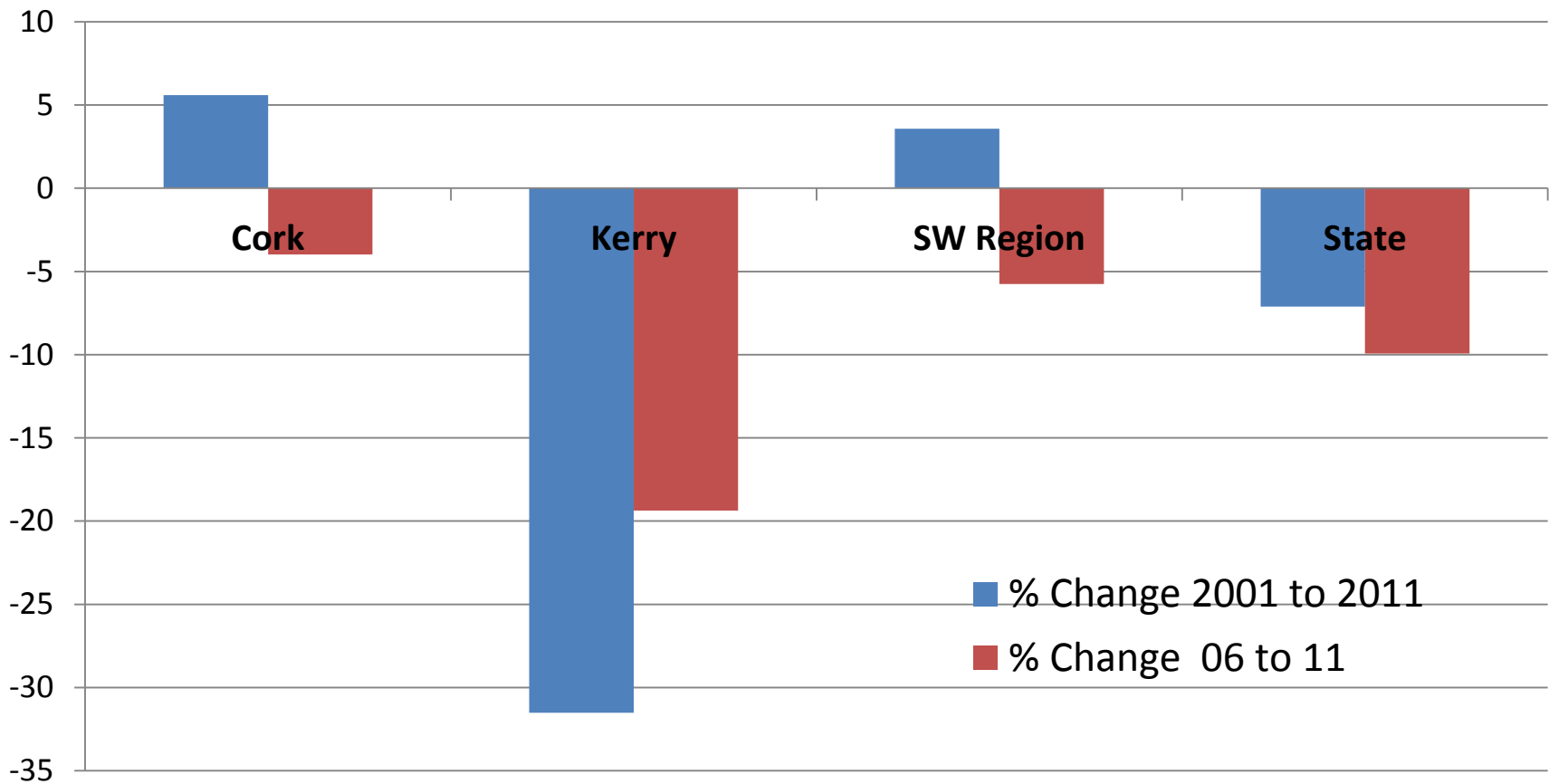


Kerry

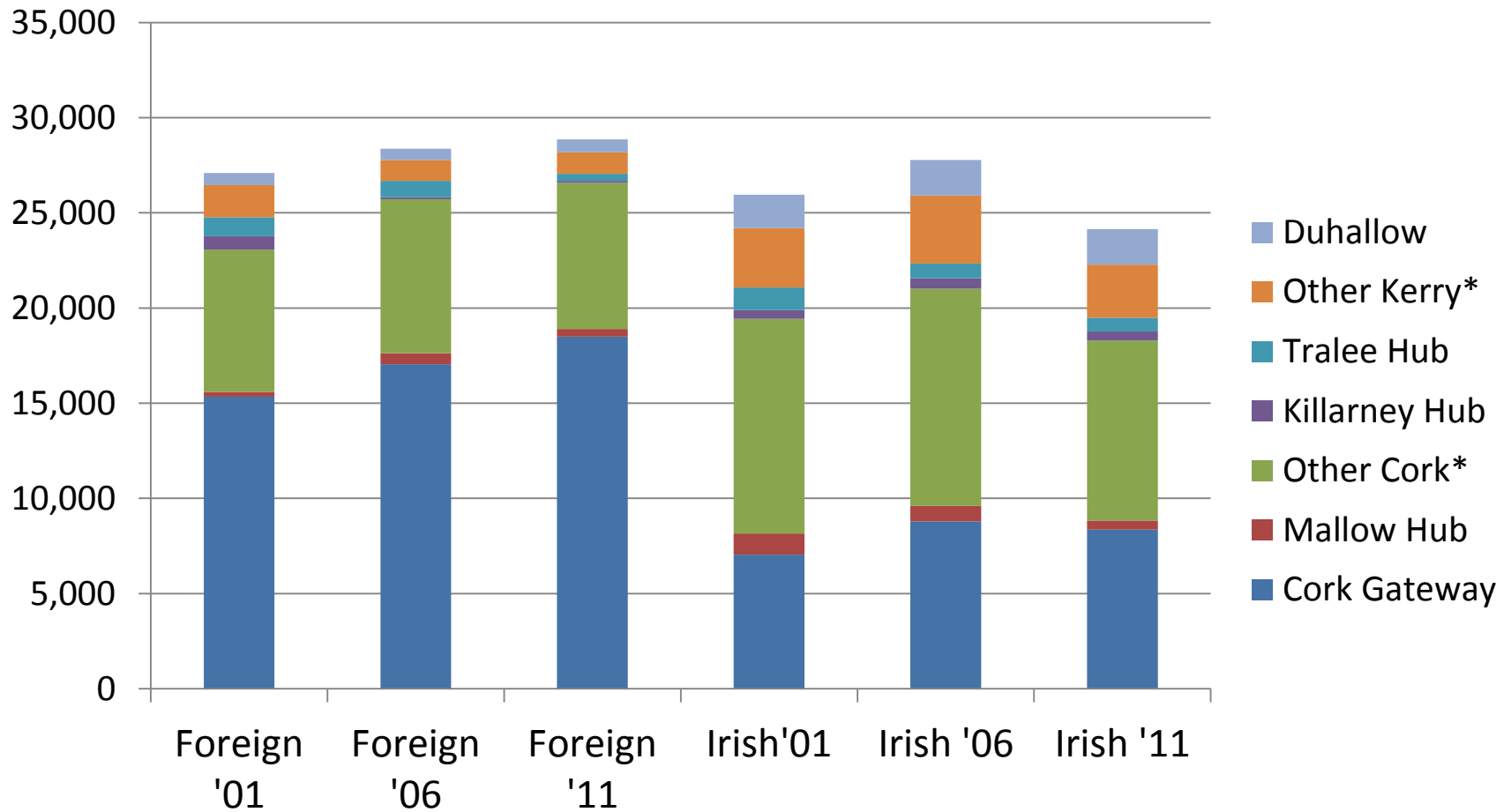
Number of Jobs in Firms assisted by Statutory Agencies, 2001 to 2011



Percentage Change in Number of Jobs in All Firms Assisted by Statutory Agencies in the South West Region, 2001 - 2011.



Number of Jobs in Foreign-Owned and Irish-Owned Firms supported by Statutory Agencies, in Counties Cork and Kerry, 2001 - 2011*

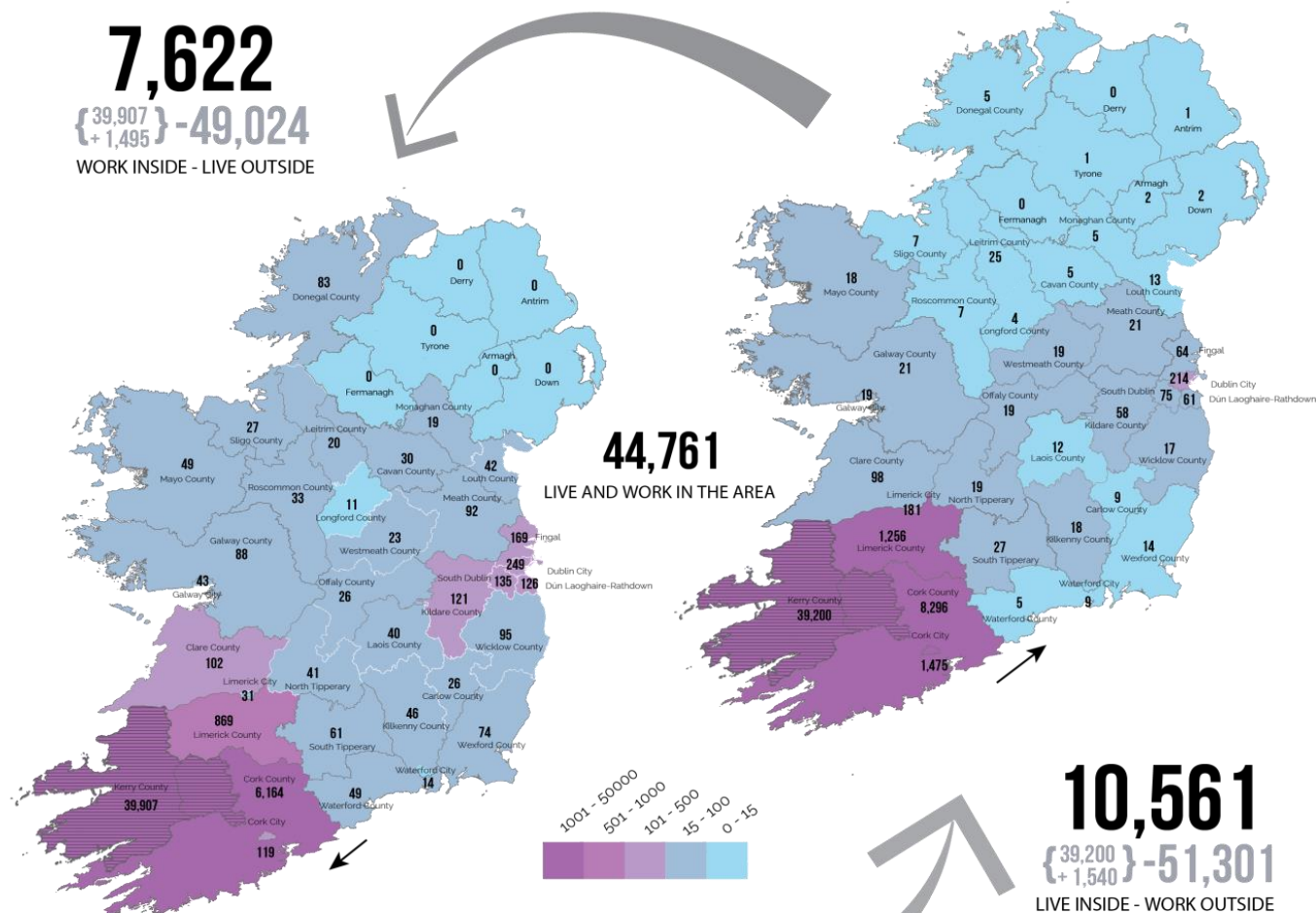


Employment at sub-county level 2011 – export-oriented firms

	Total employment	Employment in Irish companies	Employment in foreign companies
Cork	26,857	8,360	18,497
Killarney	587	483	104
Mallow	873	471	402
Tralee	1,079	713	366
Duhallow	2,542	1,869	673
Other Cork	14,699	7,590	7,109
Other Kerry	3,830	2,797	1,033
	50,467	22,283	28,184

3. Travel to Work Patterns

Employment Patterns in Overall Study Area



POPULATION OF THE STUDY AREA: 171,240

National Commuter Flow for Kerry Duhallow Region

The POWSCAR database has been used to analyse commuting patterns within the study area. The maps above and the table to the right highlight the flux of employees into the Kerry Duhallow wider study area.

Data Source: 2011 CSO, POWSCAR

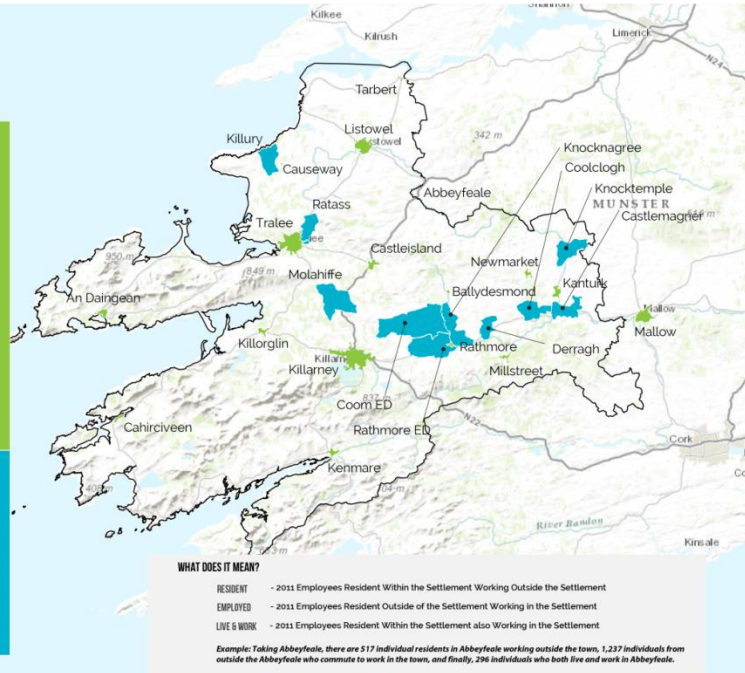
Economic Strength of the Principal Settlements

Settlement	Workers	Jobs	Commuting Balance	Jobs / Worker
Tralee	11726	16613	4887	1.42
Killarney	7836	10835	2999	1.38
Mallow	4981	4818	-163	0.97
Listowel	2085	3111	1026	1.49
Killorglin	1231	2432	1201	1.98
Castleisland	1246	1765	519	1.42
Abbeyfeale	813	1533	720	1.89
Dingle	962	1441	479	1.50
Kenmare	986	1222	236	1.24
Kanturk	943	1080	137	1.15
Cahersiveen	592	897	305	1.52
Millstreet	727	734	7	1.01
Newmarket	465	619	154	1.33
Rathmore	369	205	-164	0.56
Tarbert	205	190	-15	0.93
Causeway	89	50	-39	0.56

Employment and Residence Patterns in Larger Settlements and Rural Employment Nodes

Employment Patterns in Selected Urban Settlements

	RESIDENT	EMPLOYED	LIVE & WORK
Abbeyfeale	517	1,237	296
An Daingean	554	1,033	408
Tralee	6,437	11,324	5,289
Cahiriveen	372	677	220
Castleisland	756	1,275	490
Causeway	73	34	16
Kanturk	662	799	281
Kenmare	609	845	377
Killarney	4,447	7,446	3,389
Killorglin	651	1,852	580
Listowel	1,226	2,252	859
Mallow	3,591	3,428	1,390
Millstreet	542	549	185
Newmarket	312	466	153
Rathmore	313	149	55
Tarbert	151	136	54
Knocknagree - Munster Joinery	214	935	81
Castlemagner (Roskeen Avonmore Electrical)	93	240	37
Coolclough (Dromalour Industrial Estate)	94	159	34
Derragh (Fitzgerald Vehicle Body Builders Cullen)	36	58	20
Killury	214	158	41
Knocktemple (Sunfort Language School)	64	142	65
Coom (Tooreencahill SOL Golf Course Construction Ltd)	155	619	112
Molahiffe	331	475	105
Ratass	498	357	73
Rathduane (incl Cadbury's Rathduane)	459	685	213
	23,371	37,330	14,823



Employment Locations In Duhallow

Rural		Town	
Lacka X	935	Kanturk	799
Castlemagner	240	Millstreet	549
Coolclough	159	Newmarket	153
Cullen	58	Rathmore	149
Knocktemple	142		
Coom	619		
Rathduane	685		
Total	2838		1650
	%		36.8

Number of Jobs in each Town by Industrial Sector

	Industrial Sector (see legend below)									
Town	A	B	C	D	E	F	G	H	I	Total Jobs
Tralee	74	317	5314	1916	1117	740	1746	5261	128	16613
Killarney	60	137	1709	1136	1052	425	678	5552	86	10835
Mallow	44	122	1044	637	448	270	337	1887	29	4818
Listowel	43	85	649	367	608	165	222	933	39	3111
Killorglin	17	29	310	868	588	79	49	463	29	2432
Castleisland	35	46	326	281	217	108	56	690	6	1765
Abbeyfeale	5	27	212	143	650	70	20	398	8	1533
Dingle	33	24	243	164	45	79	53	787	13	1441
Kenmare	12	19	256	137	18	57	32	681	10	1222
Kanturk	6	26	267	144	69	71	66	424	7	1080
Cahersiveen	26	18	213	151	10	38	107	328	6	897
Millstreet	8	66	155	83	67	43	38	267	7	734
Newmarket	16	2	160	72	73	20	39	234	3	619
Rathmore	3	2	5	40	16	10	2	122	4	204
Tarbert	3	4	112	7	12	9	5	37	1	190
Causeway	4	4	16	0	9	0	0	17	0	50

Legend: A = Agriculture, Forestry and Fishing; B = Construction; C = Education, Human Health and Social Work Activities; D = Information and Communication, Financial, Real Estate, Professional, administration and support service activities; E = Manufacturing, mining and quarrying, Electricity, Gas, Water supply and Waste Management; F = Other Service Activities; G = Public Administration and Defence, Compulsory Social Security; H = Wholesale, Retail Trade, Transportation and Storage, Accommodation and Food Service Activities; I = Unknown

POWSCAR - Local Level Analysis:
% Flow of Workers to Cork Gateway
 Source: Central Statistics Office

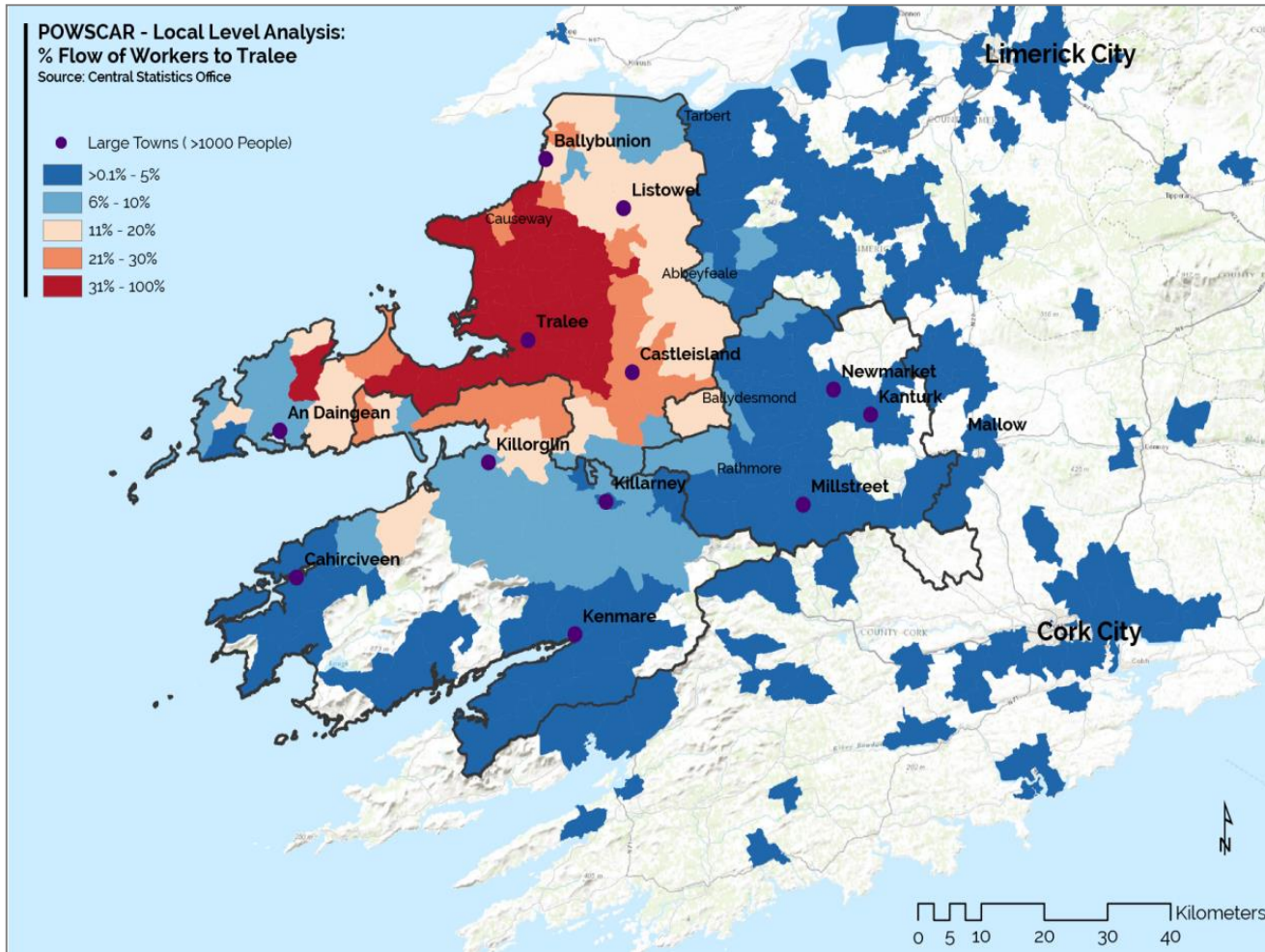
Settlement Boundary
 Large Towns (>1000 People)

>0.1% - 5%
 6% - 10%
 11% - 20%
 21% - 30%
 31% - 100%

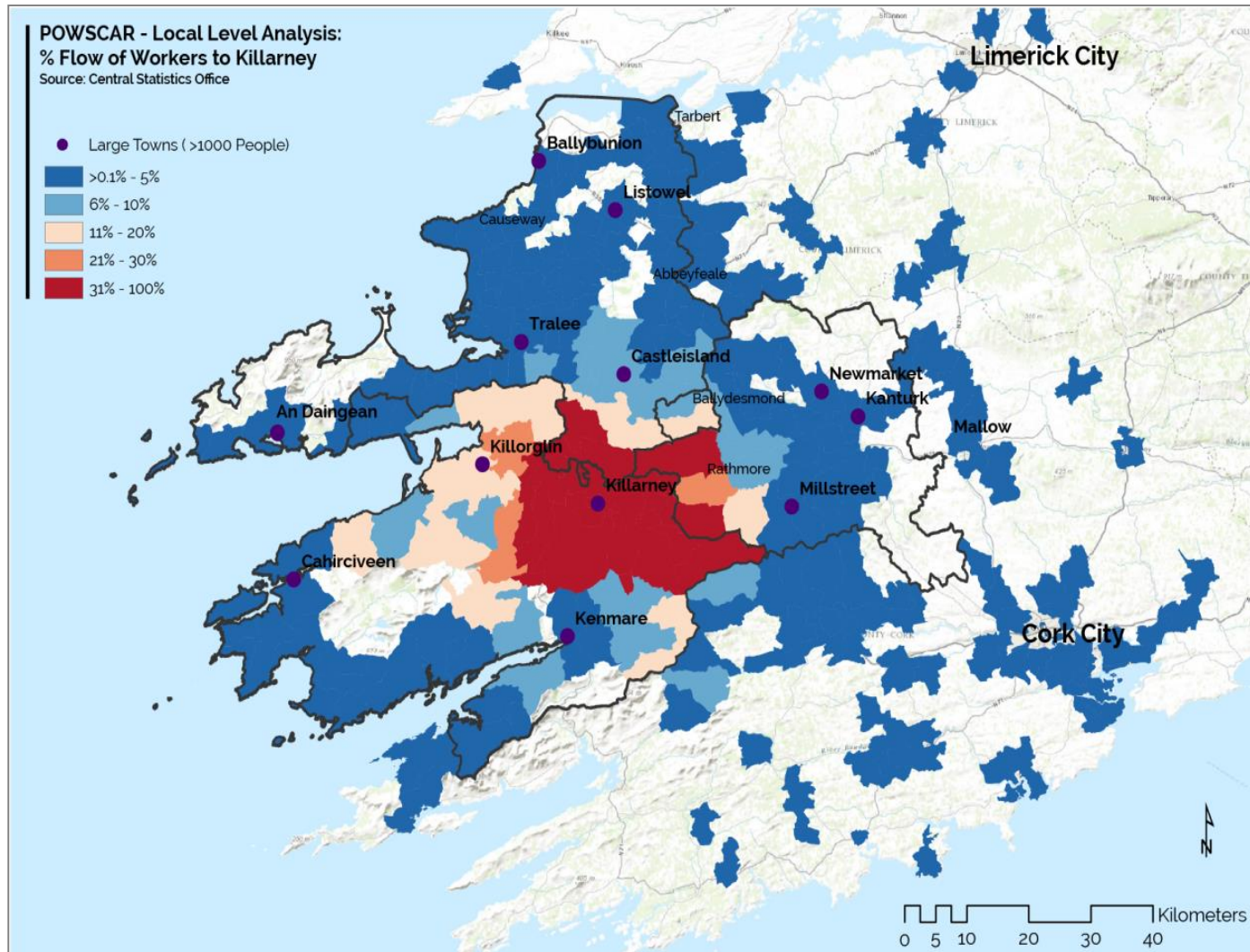
Ballybunion, Listowel, Tralee, Castleisland, Newmarket, Kanturk, An Daingean, Killorglin, Killarney, Millstreet, Cahirciveen, Kenmare

IRELAND
 121 m, 388 m, 509 m, 525 m, 581 m, 681 m, 781 m, 881 m, 981 m, 1081 m, 1181 m, 1281 m, 1381 m, 1481 m, 1581 m, 1681 m, 1781 m, 1881 m, 1981 m, 2081 m, 2181 m, 2281 m, 2381 m, 2481 m, 2581 m, 2681 m, 2781 m, 2881 m, 2981 m, 3081 m, 3181 m, 3281 m, 3381 m, 3481 m, 3581 m, 3681 m, 3781 m, 3881 m, 3981 m, 4081 m, 4181 m, 4281 m, 4381 m, 4481 m, 4581 m, 4681 m, 4781 m, 4881 m, 4981 m, 5081 m, 5181 m, 5281 m, 5381 m, 5481 m, 5581 m, 5681 m, 5781 m, 5881 m, 5981 m, 6081 m, 6181 m, 6281 m, 6381 m, 6481 m, 6581 m, 6681 m, 6781 m, 6881 m, 6981 m, 7081 m, 7181 m, 7281 m, 7381 m, 7481 m, 7581 m, 7681 m, 7781 m, 7881 m, 7981 m, 8081 m, 8181 m, 8281 m, 8381 m, 8481 m, 8581 m, 8681 m, 8781 m, 8881 m, 8981 m, 9081 m, 9181 m, 9281 m, 9381 m, 9481 m, 9581 m, 9681 m, 9781 m, 9881 m, 9981 m, 10081 m, 10181 m, 10281 m, 10381 m, 10481 m, 10581 m, 10681 m, 10781 m, 10881 m, 10981 m, 11081 m, 11181 m, 11281 m, 11381 m, 11481 m, 11581 m, 11681 m, 11781 m, 11881 m, 11981 m, 12081 m, 12181 m, 12281 m, 12381 m, 12481 m, 12581 m, 12681 m, 12781 m, 12881 m, 12981 m, 13081 m, 13181 m, 13281 m, 13381 m, 13481 m, 13581 m, 13681 m, 13781 m, 13881 m, 13981 m, 14081 m, 14181 m, 14281 m, 14381 m, 14481 m, 14581 m, 14681 m, 14781 m, 14881 m, 14981 m, 15081 m, 15181 m, 15281 m, 15381 m, 15481 m, 15581 m, 15681 m, 15781 m, 15881 m, 15981 m, 16081 m, 16181 m, 16281 m, 16381 m, 16481 m, 16581 m, 16681 m, 16781 m, 16881 m, 16981 m, 17081 m, 17181 m, 17281 m, 17381 m, 17481 m, 17581 m, 17681 m, 17781 m, 17881 m, 17981 m, 18081 m, 18181 m, 18281 m, 18381 m, 18481 m, 18581 m, 18681 m, 18781 m, 18881 m, 18981 m, 19081 m, 19181 m, 19281 m, 19381 m, 19481 m, 19581 m, 19681 m, 19781 m, 19881 m, 19981 m, 20081 m, 20181 m, 20281 m, 20381 m, 20481 m, 20581 m, 20681 m, 20781 m, 20881 m, 20981 m, 21081 m, 21181 m, 21281 m, 21381 m, 21481 m, 21581 m, 21681 m, 21781 m, 21881 m, 21981 m, 22081 m, 22181 m, 22281 m, 22381 m, 22481 m, 22581 m, 22681 m, 22781 m, 22881 m, 22981 m, 23081 m, 23181 m, 23281 m, 23381 m, 23481 m, 23581 m, 23681 m, 23781 m, 23881 m, 23981 m, 24081 m, 24181 m, 24281 m, 24381 m, 24481 m, 24581 m, 24681 m, 24781 m, 24881 m, 24981 m, 25081 m, 25181 m, 25281 m, 25381 m, 25481 m, 25581 m, 25681 m, 25781 m, 25881 m, 25981 m, 26081 m, 26181 m, 26281 m, 26381 m, 26481 m, 26581 m, 26681 m, 26781 m, 26881 m, 26981 m, 27081 m, 27181 m, 27281 m, 27381 m, 27481 m, 27581 m, 27681 m, 27781 m, 27881 m, 27981 m, 28081 m, 28181 m, 28281 m, 28381 m, 28481 m, 28581 m, 28681 m, 28781 m, 28881 m, 28981 m, 29081 m, 29181 m, 29281 m, 29381 m, 29481 m, 29581 m, 29681 m, 29781 m, 29881 m, 29981 m, 30081 m, 30181 m, 30281 m, 30381 m, 30481 m, 30581 m, 30681 m, 30781 m, 30881 m, 30981 m, 31081 m, 31181 m, 31281 m, 31381 m, 31481 m, 31581 m, 31681 m, 31781 m, 31881 m, 31981 m, 32081 m, 32181 m, 32281 m, 32381 m, 32481 m, 32581 m, 32681 m, 32781 m, 32881 m, 32981 m, 33081 m, 33181 m, 33281 m, 33381 m, 33481 m, 33581 m, 33681 m, 33781 m, 33881 m, 33981 m, 34081 m, 34181 m, 34281 m, 34381 m, 34481 m, 34581 m, 34681 m, 34781 m, 34881 m, 34981 m, 35081 m, 35181 m, 35281 m, 35381 m, 35481 m, 35581 m, 35681 m, 35781 m, 35881 m, 35981 m, 36081 m, 36181 m, 36281 m, 36381 m, 36481 m, 36581 m, 36681 m, 36781 m, 36881 m, 36981 m, 37081 m, 37181 m, 37281 m, 37381 m, 37481 m, 37581 m, 37681 m, 37781 m, 37881 m, 37981 m, 38081 m, 38181 m, 38281 m, 38381 m, 38481 m, 38581 m, 38681 m, 38781 m, 38881 m, 38981 m, 39081 m, 39181 m, 39281 m, 39381 m, 39481 m, 39581 m, 39681 m, 39781 m, 39881 m, 39981 m, 40081 m, 40181 m, 40281 m, 40381 m, 40481 m, 40581 m, 40681 m, 40781 m, 40881 m, 40981 m, 41081 m, 41181 m, 41281 m, 41381 m, 41481 m, 41581 m, 41681 m, 41781 m, 41881 m, 41981 m, 42081 m, 42181 m, 42281 m, 42381 m, 42481 m, 42581 m, 42681 m, 42781 m, 42881 m, 42981 m, 43081 m, 43181 m, 43281 m, 43381 m, 43481 m, 43581 m, 43681 m, 43781 m, 43881 m, 43981 m, 44081 m, 44181 m, 44281 m, 44381 m, 44481 m, 44581 m, 44681 m, 44781 m, 44881 m, 44981 m, 45081 m, 45181 m, 45281 m, 45381 m, 45481 m, 45581 m, 45681 m, 45781 m, 45881 m, 45981 m, 46081 m, 46181 m, 46281 m, 46381 m, 46481 m, 46581 m, 46681 m, 46781 m, 46881 m, 46981 m, 47081 m, 47181 m, 47281 m, 47381 m, 47481 m, 47581 m, 47681 m, 47781 m, 47881 m, 47981 m, 48081 m, 48181 m, 48281 m, 48381 m, 484

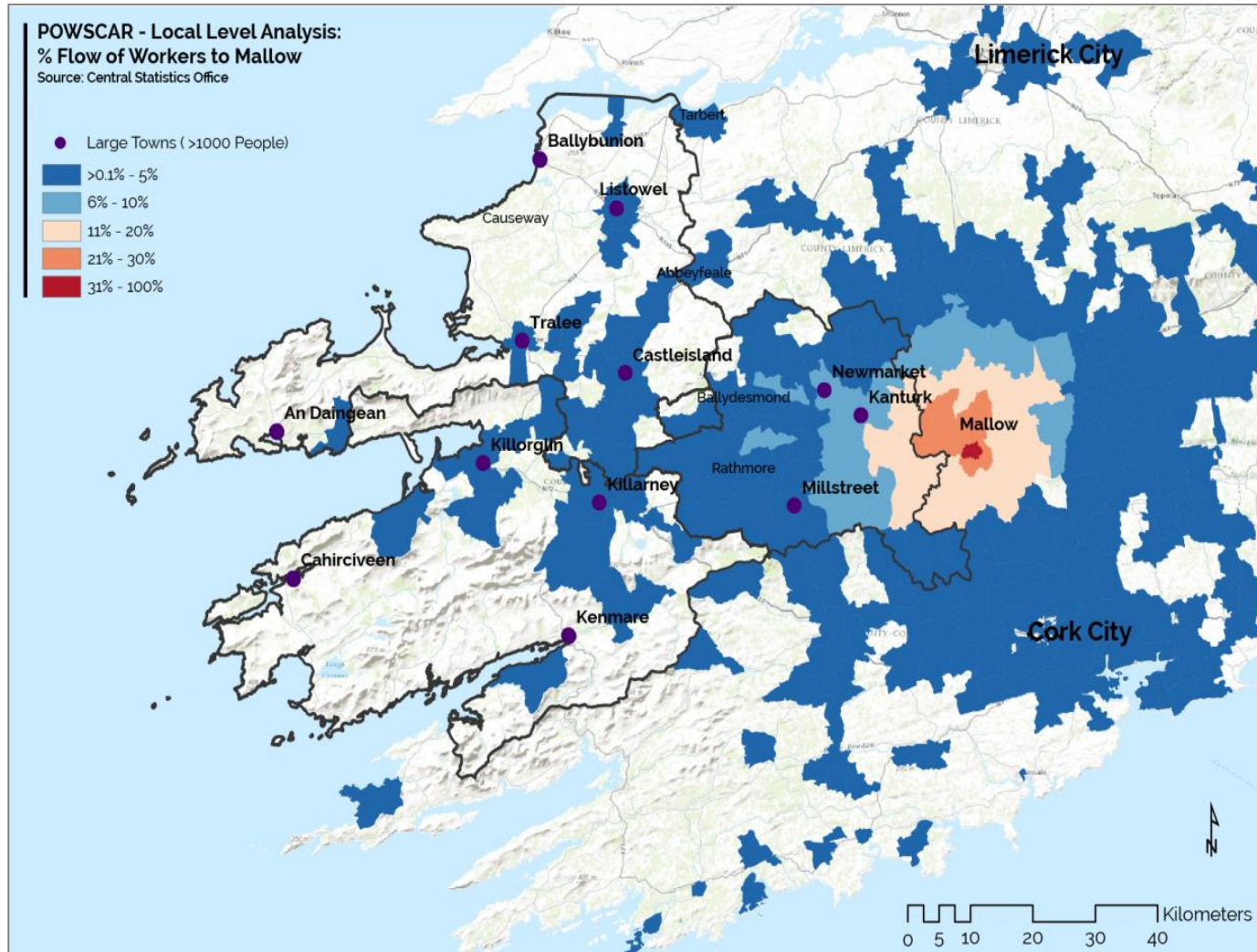
Commuting: Percentage Flow of Workers to Tralee



Percentage Flow of Workers Commuting into Killarney



Percentage Flow of Workers Commuting into Mallow for Employment Purposes



4. The Outputs of Statutory Enterprise Creation Agencies

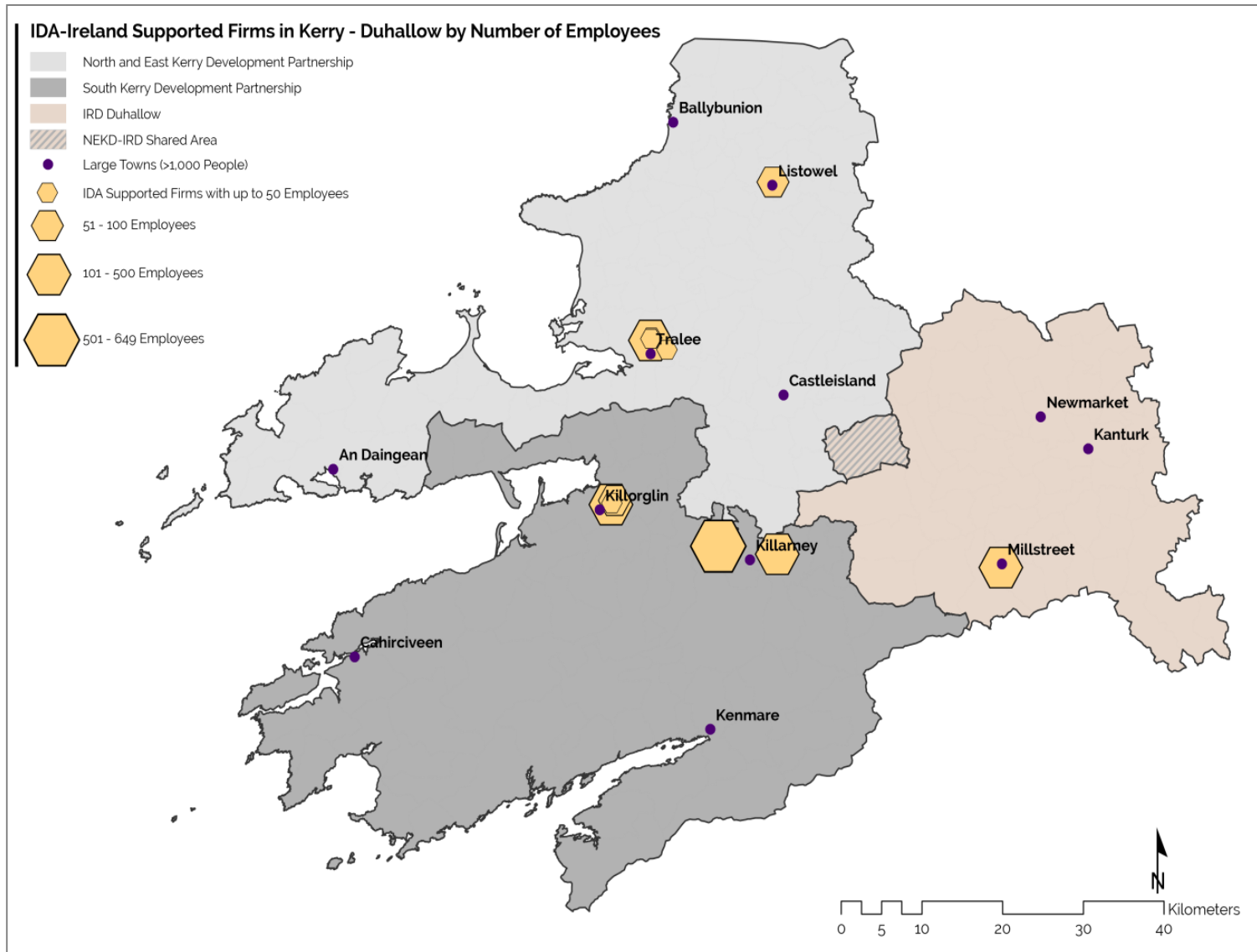
Spatial Disaggregation provided by Statutory Agencies:

- Mainly Quantitative {
- IDA Ireland (Industrial Development Agency)
 - Údarás na Gaeltachta (promotes investment in Irish-speaking areas)
 - Kerry County Enterprise Board
 - Cork County Council (local authority)

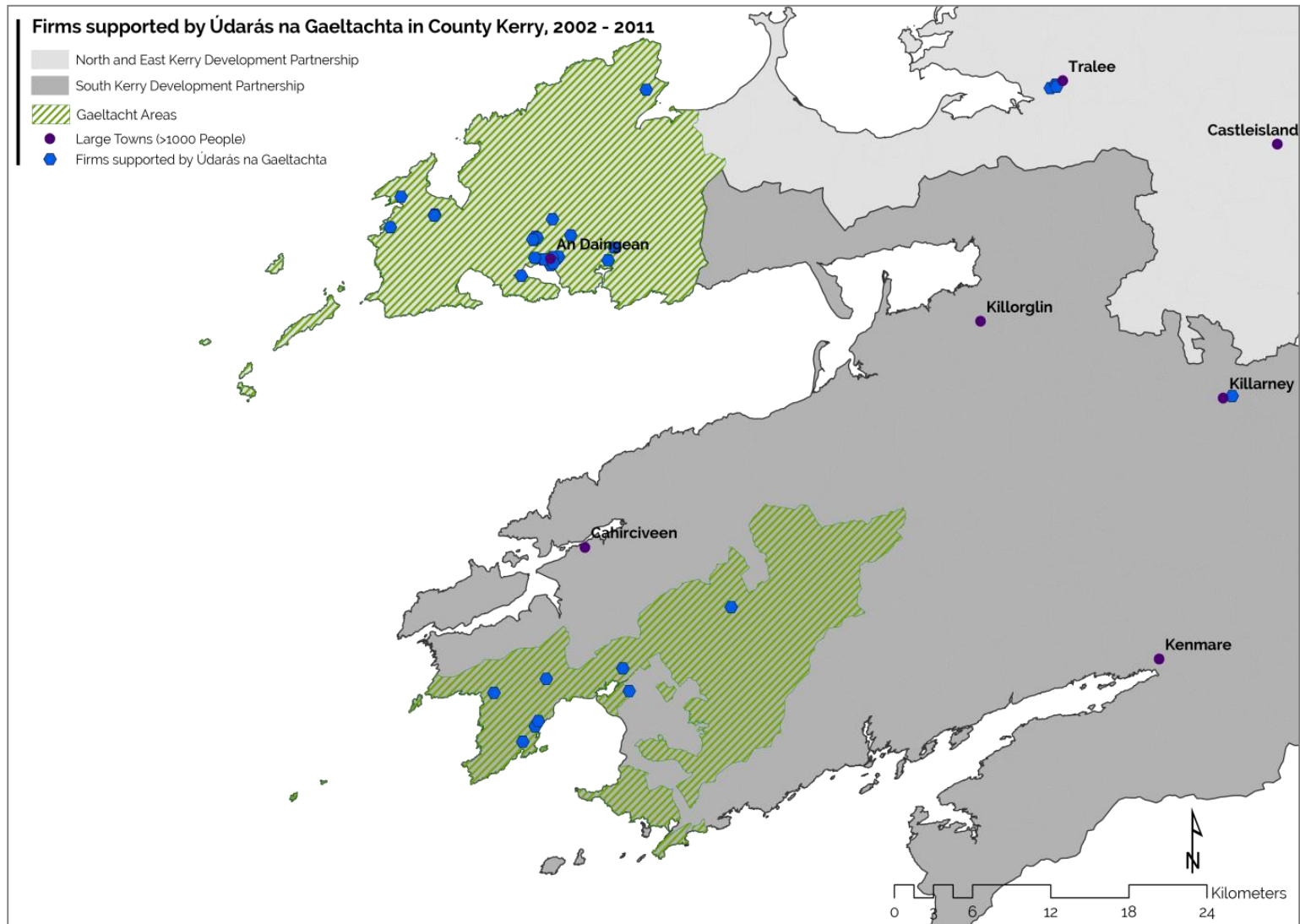
Other data provided by:

- Qualitative
Devoid of Sub-Regional
disaggregation {
- FÁS (Training and Employment Authority)
 - Fáilte Ireland (Tourism Authority)
 - North Cork Enterprise Board

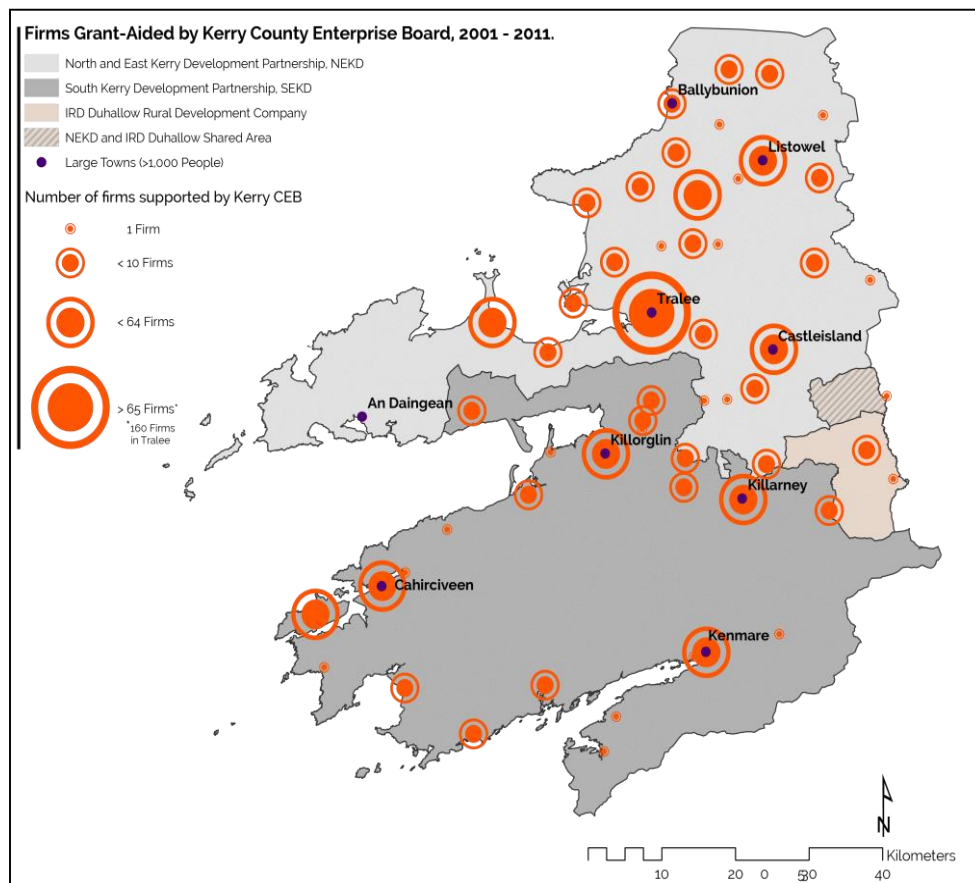
IDA Ireland -Supported Companies by Size (Number of Employees) in Kerry – Duhallow.



Firms Supported by Údarás na Gaeltachta in County Kerry, 2001-2011



Projects supported by Kerry CEB



Employment Levels of KCEB Supported Firms, 2013

No. of Businesses Surveyed	Full Time Male Employment	Other Male employment	Full Time Female Employment	Other Female Employment
449	902	321	494	368

Data from Other Agencies

*Not available / provided at sub-regional or sub-county level.
Varying levels of compliance with the EU INSPIRE Directive.*

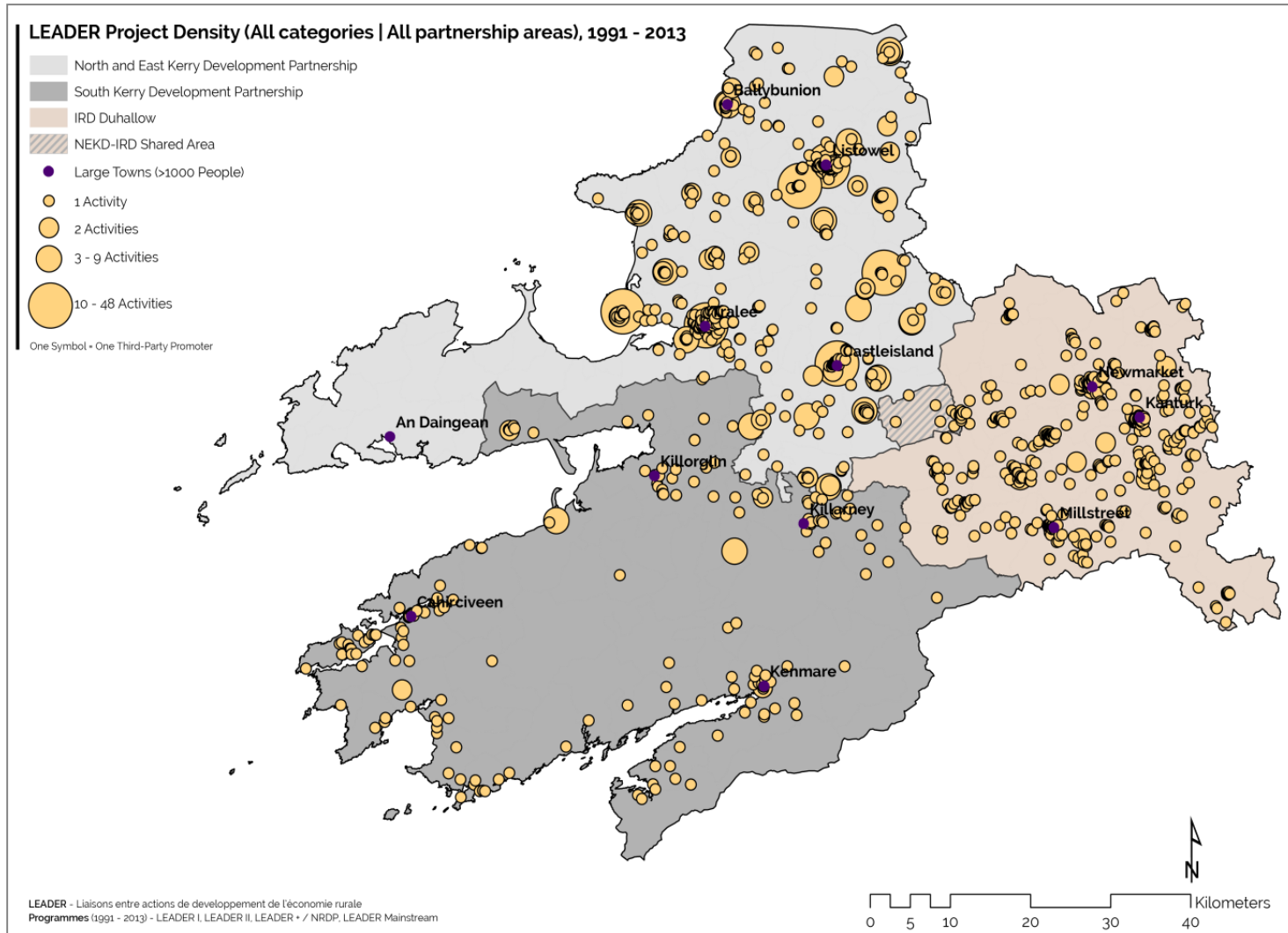
Fáilte Ireland has specific flagship projects e.g. Killarney House, Wild Atlantic Way.

FÁS / SOLAS sponsors a number of training and labour market activation supports

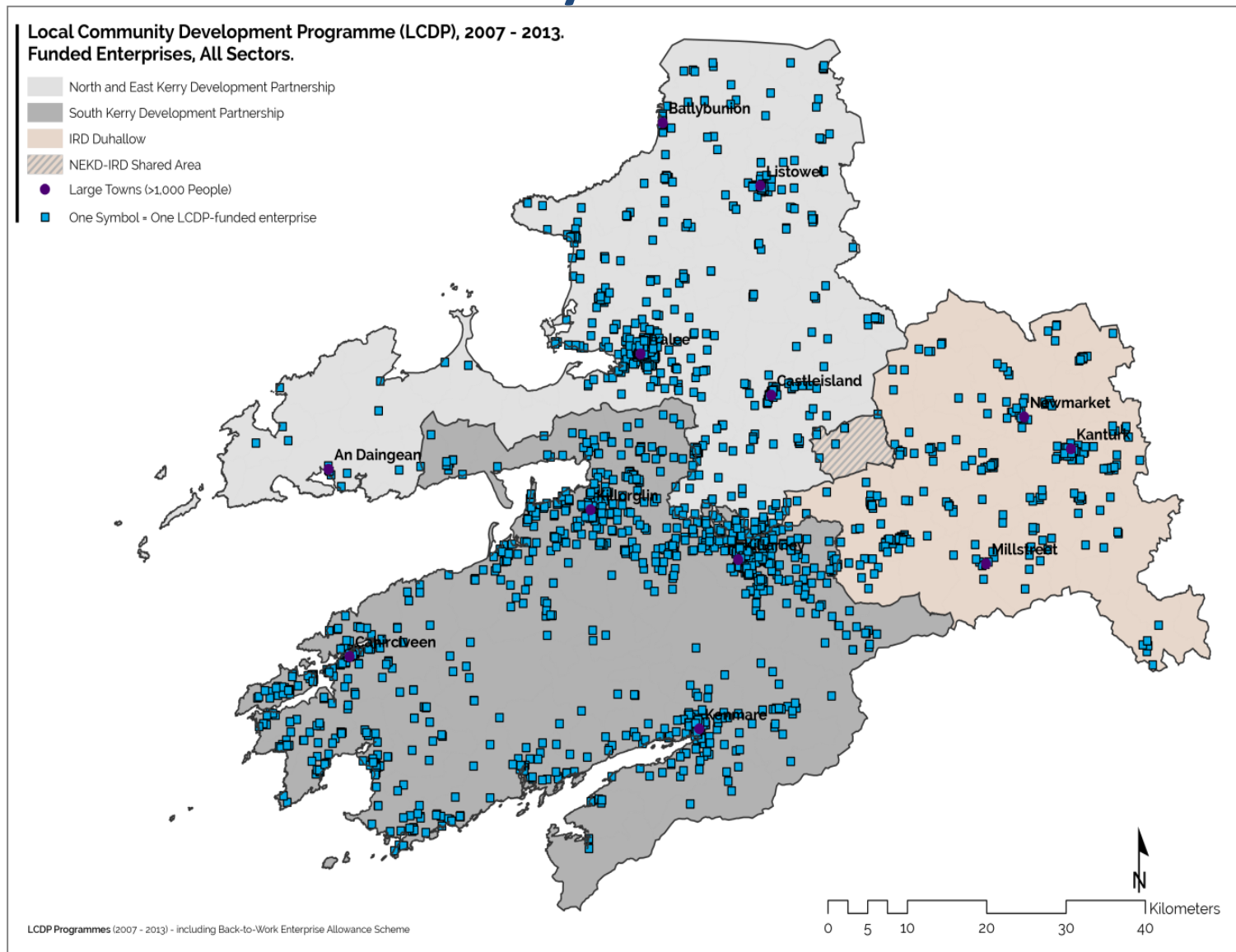
Cork North Enterprise focuses mainly on soft supports to firms.

Outputs of LEADER Local Action Groups (Integrated Local Development Companies)

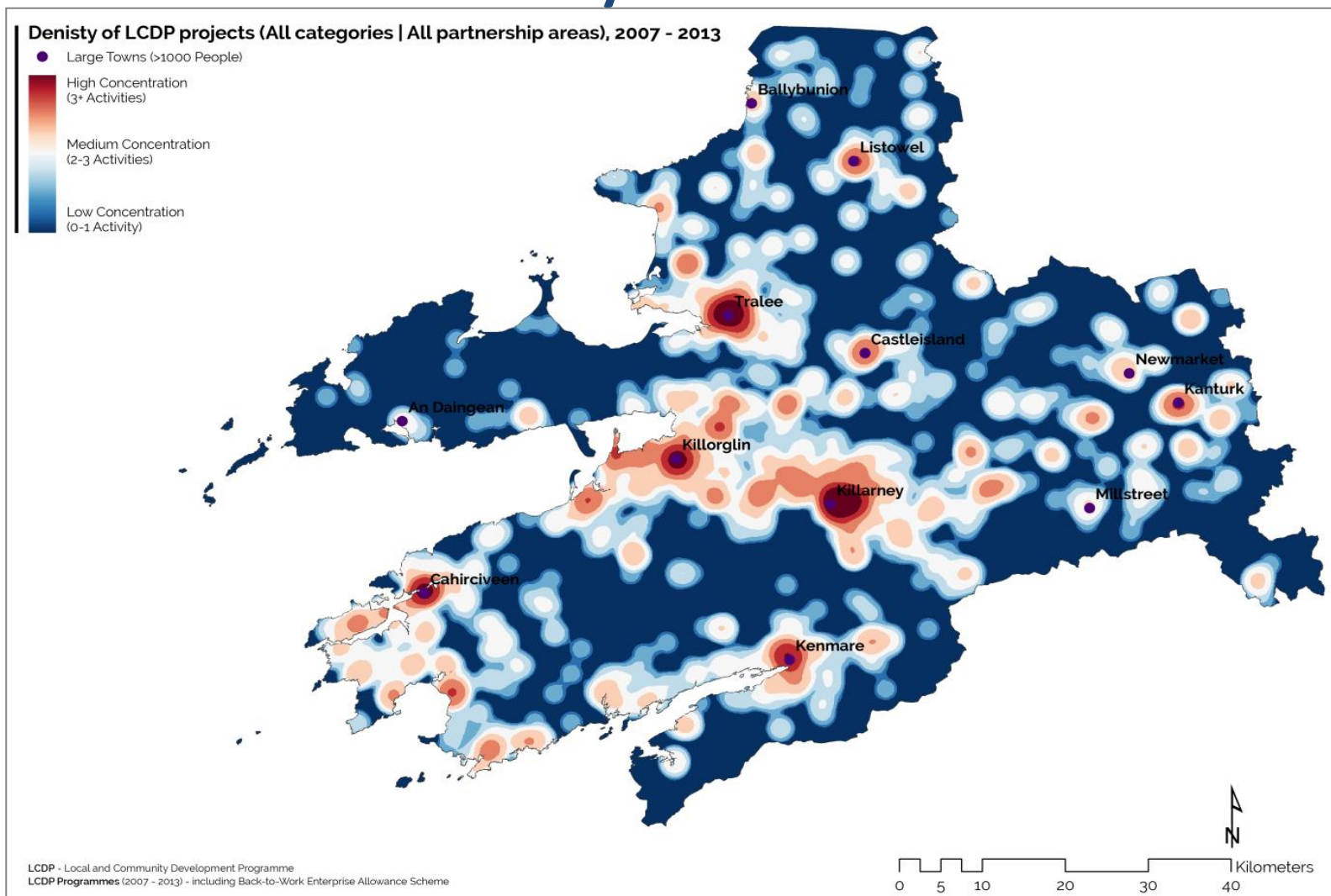
Distribution of LEADER Projects (across all categories) in Kerry-Duhallow



Distribution of LCDP Projects (across all categories) in Kerry-Duhallow



Density of LCDP Projects (across all categories) in Kerry-Duhallow



Number of Employees in LAG / Partnership-supported Firms in Kerry – Duhallow

ALL LAGs*	FTEs 2002			FTEs 2006			FTEs 2013		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
LEADER I (1991 - 1994)	173	62	235	216	69	284	202	79	481
LEADER II (1995 - 1999)	58	25	82	56	20	83	49	19	338
LEADER+ (2000 - 2006)	99	58	155	156	82	238	248	109	767
LEADER MS (2013 - 2013)	45	21	65	64	29	93	245	129	527
LCDP 07 - 13 (and Area-Ent.	3	1	4	5	7	12	1,266	402	1,665
TOTAL EMPLOYEES	377	166	540	497	206	709	2,008	737	3,777
*figures rounded to nearest whole equivalents									

3C: Impact Analysis

FTEs in Firms that have received Direct Financial Assistance from Agencies in Kerry – Duhallow.

Agency	FTEs
Enterprise Ireland	6,210
Local Development Companies	3,777
IDA Ireland	1,928
Kerry County Enterprise Board	1,640
Údarás na Gaeltachta	250
TOTAL	13,805

4. Conclusions (Observations) – in respect of Spatial Planning

The NSS and Spatial Planning

- The Tralee – Killarney Hub is performing marginally better than other hub towns, but impacts beyond the defined hub area remain limited.
- The Cork Gateway is a focal point for state agency investment, and this is having a spin-off for Eastern Duhallow – moreso than the Mallow Hub.
- Educational Attainment Levels and Intra-Regional Connectivity have improved, but Inter-Regional Connectivity remains sub-standard.
- The socio-economic and demographic profile is more similar to BMW counties than S&E.

Economic Development

- SME Sector and Loyal Larger Firms are very important.
- Agency-supported firms with significant employment levels are long-established (in Kerry – Duhallow) while newer firms are smaller and are more concentrated in Tralee.
- Kerry and Duhallow are slipping down the national pecking order, but are locally dynamic.
- LAGs are significant drivers of economic development.

Recommendations

- Participate fully and coherently in the process to formulate the successor to the NSS i.e. the National Planning Framework (2015 – 2025) – place on a statutory footing.
- Apply the OECD recommendations on place-based development (in micro-regions) so that development is based on functional areas, and that cross-county and sub-county (micro-regional) delineations pertain where appropriate.
- Inter-Regional Connectivity needs to be prioritised.
- On-going investment in education, training and soft-infrastructure.
- The Forfás recommendations on sectoral strategies, as presented in Section 3.4 of this Report need to be advanced, and the opportunities to access funding (as referred to in Section 3.6) need to be grasped, particularly with regard to investments in The Smart Economy and The Green Economy.
- Promote a wider spatial distribution of tourist attractions and accommodation.
- Rural-Proofing (as provided for in the White Paper on Rural Development) needs to be implemented in full and underpinned by statutory provisions.

Analysis of Data Issues

- +++ Data on cattle / agriculture
- ++ Data on People
- ++ Data on Local Development
- + Data on Economic Development and Jobs
- + Data from Statutory Bodies
- - Data on Public Investment (Accountability)