

Carlow County Council & Kilkenny County Council



Graigenamanagh - Tinnahinch Development & Economic Study

October 2006

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A Report by



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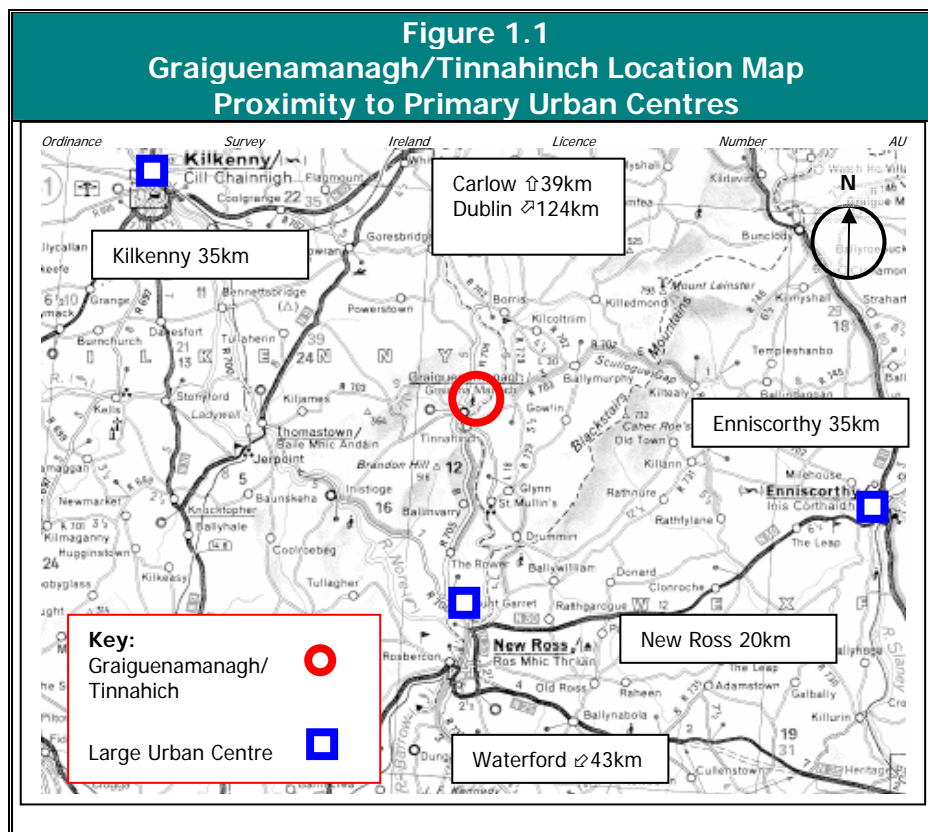
1 INTRODUCTION

- 1.1 DTZ PIEDA Consulting was commissioned by Carlow County Council and Kilkenny County Council (the Councils) to prepare a non-statutory Development and Economic Study for Graiguenamanagh/Tinnahinch.

CONTEXT

Location

- 1.2 Figure 1.1 identifies the location of Graiguenamanagh/Tinnahinch (the Town). It is centrally located between Kilkenny City (35 kilometres – km) and Carlow Town (39km), the county towns in their respective counties.



- 1.3 Graiguenamanagh and Tinnahinch are divided by the River Barrow, with Graiguenamanagh to the west and Tinnahinch to the east. The river also acts as the boundary separating counties Kilkenny and Carlow with Graiguenamanagh located in the former and Tinnahinch in the latter.

Heritage

- 1.4 The Town is rich in heritage. Graiguenamanagh evolved around Duiske Abbey, an early 12th Century Cistercian foundation. It grew as a market town, a role that was enhanced through the development of the Grand Canal and Barrow Navigation, which provided the Town with a link to Dublin and New Ross.
- 1.5 While Tinnahinch is a more recent settlement when compared with Graiguenamanagh, it still displays a strong heritage. The bridge linking Graiguenamanagh and Tinnahinch was originally constructed in 1797. Tinnahinch Castle was constructed in 1615 by the Duke of Ormonde. The history of the Town is reflected in its medieval streetscape and architecture, which is acknowledged by both local authorities.

Amenity & Environment

- 1.6 The Town is surrounded by a high quality natural environment. It is located in the steep sided Barrow Valley between Mount Brandon in County Kilkenny and Mount Leinster in County Carlow. The Barrow Navigation and its tributary, the Duiske which enters the river at the Town, provide an amenity with significant potential.

Population Growth & Employment

- 1.7 The preliminary results of the 2006 Census of Population, which was published by the Central Statistics Office (CSO) in July 2006, identified that the combined population of the Town was 2,221, with the majority (70%) living in Graiguenamanagh. Analysis reveals that the population of the Town declined by just over 3.5% between 2002 – 2006 with Graiguenamanagh's population decreasing by 5.2% and Tinnahinch's growing by 1.2% over the period. These figures are well below national, regional and county level trends which all witnessed substantial continuing population growth. The trend is also in contrast to the growth of 4.4% which took place between 1996 – 2002, the previous inter-censal period. However, direct comparisons cannot yet be made as there have been boundary changes between 2002 – 2006 and a full understanding of what has actually happened will not be possible until the full results of the 2006 Census are published. This noted, the figures – both at 2002 and 2006 – demonstrate that the Town is at best experiencing well below average growth. This may be due to a number of factors, such as the limited number of enterprise opportunities in rural areas or poor access to the Town. It should be highlighted that this trend is not unique as it mirrors that of other comparable rural towns around the country.

BACKGROUND TO THE STUDY

- 1.8 The natural environment and heritage of the Town provides it with a recognised potential for economic, social and cultural development, particularly in relation to history, walking tourism and inland waterway navigation. However, as has been noted, the Town has not achieved the population or economic growth experienced by the State or that in other nearby areas. Although this comparatively poor population and economic growth may be as a result of a range of external factors, the Councils seek to redress this by identifying initiatives and incentives that will drive and regenerate the economy of the Town.

OBJECTIVES OF THE STUDY

- 1.9 The purpose of the study is to identify a set of proposals, economic incentives, land uses and potential direct interventions that could be implemented by the Councils and other public bodies, potentially working with the private sector, which will serve to enhance the economic attraction and potential of the Town. To achieve this aim, the brief for study identified six core areas of examination:
- To establish the existing socio-economic profile of the Town and its hinterland/catchment area and identify its strengths and weaknesses
 - To establish the physical strengths and weaknesses of the area leading to the identification of resources on which future or improved economic activity may take place
 - To review the existing Town Renewal Scheme (TRS)¹ which is in place and comment on its effectiveness
 - To identify possible future economic drivers and opportunities for the area
 - To identify mechanisms by which economic investment can be encouraged into the area
 - To identify development proposals for specified lands owned by Kilkenny County Council.

APPROACH

- 1.10 A six-stage approach was adopted to complete the study as follows:

¹ The Town Renewal Scheme is a tax based incentive designed to attract private sector investment to towns throughout Ireland. While the scheme does not conclude until December 2006, eligibility for tax incentives was dependent on planning applications being made before 31 December 2004.

- i. **Stage 1 – Project Inception:** a meeting was held between the Client Group² and DTZ Pleda Consulting to agree the approach and refine the outputs of the study. The outcome of the meeting was the preparation of an Inception Report which set out the agreed brief and approach to the study;
- ii. **Stage 2 – Baseline Review and Resource Audit:** the objective of this stage of the study was to establish the existing socio-economic profile of the Town and identify the physical attributes of the area;
- iii. **Stage 3 – Review of the Town Renewal Incentives:** designations were made in the Town under the TRS. The purpose of this stage of the work was to review the success of these schemes and the level of investment achieved in the Town;
- iv. **Stage 4 – Identify Drivers & Actions:** informed by a consultation process with representatives of the community and the relevant development organisations, the output from this stage of the study was to identify a potential range of drivers and actions designed to improve the economic potential of the Town; and
- v. **Stage 5 – Identify Delivery Mechanisms:** once the drivers were identified, the work focussed on compiling a suite of projects that could be implemented and delivered, either by the community, the public sector or the private sector in a sustainable manner. Informed by the research, evaluation process and consultations, the range of delivery mechanisms needed to achieve the goals and actions that emerged in previous stages of the study were identified.

THE REPORT

- 1.11 This is the study **Final Report**. It incorporates all agreed amendments to the Draft Final Report which were derived from meetings and consultations with the Client Group.

REMAINDER OF THE REPORT

- 1.12 The remainder of the report is set out as follows:
- **Section 2:** outlines the baseline socio economic profiles of the Town
 - **Section 3:** appraises the development capacity and constraints facing the Town
 - **Section 4:** sets out the findings of the consultation process
 - **Section 5:** introduces the framework for economic development and regeneration
 - **Section 6:** identifies community facilities and amenities needed in the Town

² The Client Group comprises Officers of both Councils.

- **Section 7:** summarises the enterprise and economic supports that are required
- **Section 8:** promotes the preparation of a Town Tourism Strategy and what this should comprise
- **Section 9:** develops the theme of the Town becoming the commercial service centre or hub for the area
- **Section 10:** advises on how the catalyst of Council owned lands can be delivered
- **Section 11:** provides the study's conclusions and recommendations.

DEMOGRAPHIC PROFILE

- 2.3 As was highlighted in Section 1, in contrast to national, regional and county trends, the population of the Town has declined by just over 3.5% from 2,302 to 2,221 between the 2002 and 2006 Censuses of Population. It is a decrease of 81 and thus not significant numerically. However, it is a decrease in a period when a large majority of the country, including the catchment area of the Town, continues to experience population growth. Table 2.1 illustrates how the trend in the Town compares with its catchment area, the two counties, the Region and the State.

Table 2.1 Population Change 2002 – 2006			
Area	2002	2006	% Change 02-06
The Town	2,302	2,221	-3.5
Catchment	7,073	7,470	5.6
Carlow	46,104	50,471	9.5
Kilkenny	80,339	87,394	8.8
South East ³	322,160	352,532	9.4
State	3,917,203	4,234,925	8.1

Source: CSO Census and SAPS 1996, 2002 & 2006

- 2.4 Of importance is the fact that Graiguenamanagh, in which the vast majority of the population live (70%), witnessed a population decline of 5.6% with Tinnahinch growing by an insignificant 1.2% over the period. The population of the wider catchment area of the Town grew by 5.6% but this was also below national, regional and county averages. Additionally, it is important to highlight that the population decline in the Town is in contrast to the differing levels of growth experienced in other nearby centres with predominantly rural catchment areas such as Bagenalstown (0.2%), Castlecomer (4.0%), Thomastown (12.4%) and Tullow (20.9%).
- 2.5 It appears to represent a reversal to the growth experienced in anamangh/Tinnahinch between 1996 – 2002 and represents a return to population decline which was experienced between 1991 – 1996. However, there have been boundary changes to how Census data were collected between the 2002 and 2006 Censuses. Until the final 2006 Census results and the Small Area Population Statistics (SAPS) are available then it is not possible to compare like with like. This noted, it is clear that under any scenario the Town is underperforming against national, regional and county trends and this has been a constant picture over the

³ Counties Carlow and Kilkenny combine with Wexford, Waterford and South Tipperary to make up the South East Region.

last fifteen years as illustrated by Table 2.2 which sets out population change between 1991 – 2002.

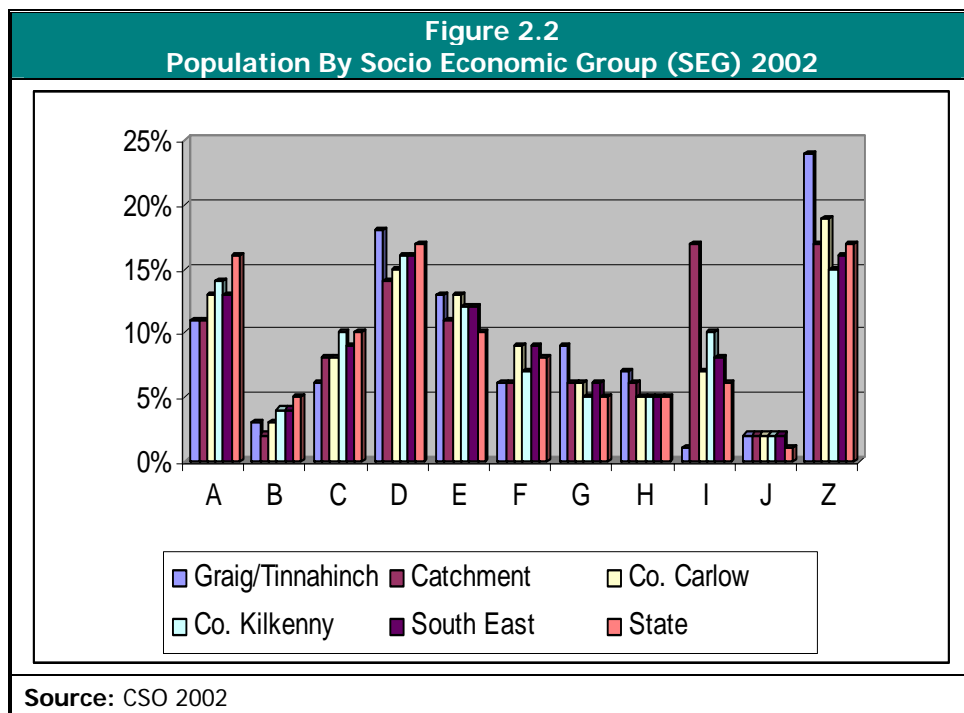
Table 2.2 Population Change 1991 – 2002						
Area	1991	1996	% Change 91-96	2002	% Change 96-02	% Change 91-02
The Town	1,395	1,374	-1.5	1,435	4.4	2.9
Catchment	6,316	6,360	0.7	6,648	4.5	5.3
Carlow	40,942	41,616	1.6	46,014	10.6	12.4
Kilkenny	73,635	75,336	2.3	80,339	6.7	9.2
South East	383,188	391,517	2.2	423,616	8.2	10.6
State	3,525,719	3,626,087	2.8	3,917,203	8.0	10.8
Source: Central Statistics Office (CSO), Census of Population 1991, 1996 & 2002						

- 2.6 The comparatively slow growth rate between 1991 – 2002 mirrors that of comparable rural towns around the country that are at distance from the main metropolitan centres. What requires to be highlighted is that while over this period population growth was lower than the national, regional and county averages, the Town outperformed similar sized towns in Carlow and Kilkenny such as Bagenalstown (1.2%), Borris (-0.7%), Hacketstown (-2.2%), Thomastown (1.2%) and Tullow (2.2%) and was only surpassed by Callan (8.3%) and Castlecomer (7.4%). Directly comparable figures are not yet available for all of these centres from the 2006 Census but it can be derived that Bagenalstown and Castlecomer have both witnessed slowdown in growth to 0.2% and 4.0% respectively while Thomastown and Tullow have experienced significant relative population growth of 12.4% and 20.9%, again respectively. It is beyond the scope of the study to assess why these different patterns have and are prevailing but its objective must be to provide the mechanisms to help redress the population decline which has emerged in the Town and set it on course to emulate the levels of growth experienced in Thomastown and Tullow.
- 2.7 We would highlight that the preliminary results of the 2006 Census only provide information on population numbers at Electoral Division (ED) level. Data on age, socio-economic group, employment are not yet available and thus for the remainder of this section our analysis has had to be founded on 2002 and earlier data.
- 2.8 The challenges facing the Town and its catchment area are compounded by the ageing population of the area. In 2002, one third (33%) of the population of the Town was classified in the 0-14 years and 15-24 years age cohorts, which compares with 39% for County Carlow, 38% for County Kilkenny and 37% for both the Region and the State. In contrast, 14% of the population of the Town and its catchment

area were in the 65+ years cohort which compared with 10% in County Carlow, 11% in County Kilkenny and 12% in the Region and the State. This, combined with the comparatively low population growth/population decline, will influence the future availability of labour in the area which is an important factor in being able to achieve sustainable economic growth.

SOCIO ECONOMIC GROUP & SOCIAL CLASS

- 2.9 Figure 2.2 presents the Socio Economic Group (SEG) profile of the Town and its catchment area compared against that of the County Carlow, County Kilkenny, the South East Region and the State in 2002, the most recent year for which socio-economic data is available.



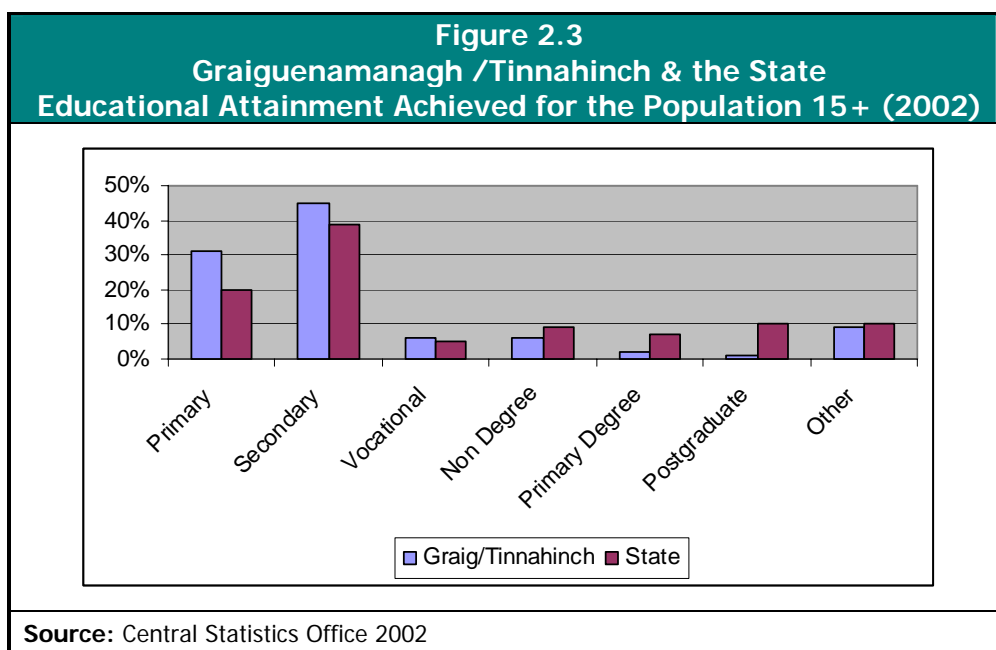
- 2.10 Analysis of the SEG profile of the Town and its catchment area against that of the two counties, the Region and the State illustrates that it has:

- A higher proportion of its population categorised as non manual (Category D), unskilled (Category G) and own account workers (Category H) than the counties, Region and State
- A relatively low level proportion of the population in skilled or professional categories or classified as employers and managers (Category A), lower professionals (Category C) and semi skilled workers (Category F) when compared with the counties, Region and State
- A considerably higher proportion of population of the Town classified as gainfully occupied and unknown (Category Z).

- 2.11 The social class profile of the Town and its catchment area closely mirrors the results found for the SEG. The Town has lower proportions classified as professional or managerial/technical workers than at the county, regional and national levels. This would reflect a lack of higher level/paid employment opportunities available in the Town.

EMPLOYMENT & EDUCATION

- 2.12 Figure 2.3 illustrates that, when compared with the State, there is a higher incidence in the Town of completing education at Primary and Secondary Level, including upper secondary and technical vocational level and non-degree (91% compared with 76% for the State), and a comparatively low proportion of the population moving onto third level education or having a professional qualification (6% compared with 23% for the State).



- 2.13 This relatively low level of educational attainment reflects the low skills requirements of employers in the area but will also be compounding the difficulty in attracting higher added value employment to the Town. The employment profile mirrors the socio economic profile of the Town where there is a lower than average incidence of the ABC socio economic groups (20%), which are typified by higher educational attainment and income brackets, when compared with counties Carlow (24%) and Kilkenny(28%), the South East Region (27%) and the State (31%).

DISPOSABLE INCOME

- 2.14 The most recent available data on disposable income are the 2002 figures published by the CSO in March 2005. The 2003 data are understood to be becoming available in Autumn 2006. The published data are, therefore, considerably out of date but are the only baseline available at the time the report was being finalised. This fact noted, between 1995 – 2002, levels of and growth in disposable income per person in the South East Region lagged behind the State average. County Carlow witnessed the highest level of growth but had the lowest disposable income at both 1995 and 2002 of all the counties in the Region. The facts are underpinned by the rural nature of the economy, comparatively weak employment structure, the SEG profile and lower levels of educational attainment.

POLICY REVIEW

- 2.15 A range of national, local and regional policies and strategies will influence the development of the Town. Our review focussed on those that may impact directly on the development of the Town and its catchment area. The implications of these policies can be categorised into key themes as follows:
- i. Contrast between Regional and Local Profiles;
 - ii. Future Growth and Sustainable Development;
 - iii. Improvement of Infrastructure and Service Provision; and
 - iv. Tourism Development and Cultural Heritage.

Contrast between Regional and Local Profile

- 2.16 The National Development Plan (NDP) sets out the agreed public investment priorities of €51.5 billion for the State for period 2000 – 2006. It is presented in five operational programmes. Acknowledging the increased importance of regionalisation, it includes two regional operational programmes, one for the Southern and Eastern (S&E) Region and the other for the Border, Midlands and Western (BMW) Region. A larger proportion of expenditure is designated to the S&E Region reflecting the larger population base of the region. This is due to the fact that it includes Dublin and the Mid East regions which have nearly half the population of the country. However, on a per capita basis, it was anticipated that there would be higher investment in the BMW Region reflecting the relatively poor economic performance of that region. The Town is located in the S&E Region. The NDP profiles the S&E Region as benefiting from:

- A relatively well-qualified and skilled workforce
- Extensive training and educational facilities, in particular a strong network of third level institutions
- A strong base of industry and services, yielding high per capita Gross Value Added (GVA)
- Generally good agricultural land and a relatively strong agri-food sector
- A strong and vibrant urban network, parts of which have achieved, or are close to reaching a critical mass in terms of self-generating economic activity
- A relatively well developed infrastructure, including inter-urban transport systems and access to import/export gateways.

2.17 The characteristics of the S&E Region contrast starkly with those of the Town and its catchment area, as set out in the socio economic review and assessment. The differential is substantial which would indicate that there is a need to devise a series of interventions to assist the area achieving economic convergence with the rest of the S&E Region. This is what has been an important objective of the study. The mechanisms to help achieve this are set out in later sections of the report. Additionally, the completion of the study is timely as the Government is currently preparing the NDP for the period 2007 – 2013. The findings of the study can, therefore, be used to present a case for funding for the rural areas of the two counties, including importantly the Town and its catchment area.

Future Growth and Sustainable Development

2.18 The need and potential of the Town to grow at a sustainable pace in the future are recognised to differing degrees in national, regional and local plans and strategies. At the national level, the National Spatial Strategy (NSS) defines the area in which the Town is located as having a ***'village strengthening rural area opportunity'***. This designation is reinforced in the South East Regional Planning Guidelines (SERPG) which were adopted by the South East Regional Authority (SERA) in 2004. The core objective of the designation is to increase the suitability of such villages as residential and local service centres. To this end, it seeks to achieve the critical mass of population needed to sustain a suite of local services such as amenities, local shops and other local services through promoting population growth and consolidation within key villages. It is envisaged that increased demand in services and supporting infrastructure as a result of population growth will in turn further drive local economic development and generate increased employment opportunities. An important output from the study has been identifying the mechanisms and framework by which this can be achieved/facilitated.

Improvement of Infrastructure and Service Provision

- 2.19 While the NSS and the SERPG provide the frameworks for expenditure under the current and future NDPs, the detail of how this will be achieved locally is set out by local authorities who, in a suite of adopted statutory and non-statutory development plans and strategies, provide the frameworks for the development of the Town. The key investments for the Town identified in the relevant county and local plans include:
- i. The construction of the Graiguenamanagh Western Relief Road;
 - ii. The upgrading of the Graiguenamanagh water supply scheme;
 - iii. The upgrading of the Tinnahinch trunk sewer network;
 - iv. Continued upgrading of street lighting and road surfaces in the Town; and
 - v. The provision of well located, off street car parking in Graiguenamanagh.
- 2.20 In addition, the local development plans provide specific and quantifiable zoning objectives for residential, commercial, industrial and amenity uses in the Town. We review the progress and potential on each of these objectives in Section 3.

Tourism Development and Cultural Heritage

- 2.21 The development of the tourism attractions of the Town is a key objective for the area. The continued development of tourism activities on the River Barrow and the further potential for its development as a general water amenity attraction have been stated in both the National Canals & Waterways Strategy and the SERPG.
- 2.22 At county and local levels, all policies and strategies seek to further enhance the promotion and development of the natural attraction of the River Barrow and the surrounding countryside. These plans promote that this is to be achieved by the provision of riverside amenities and boating facilities, increased tourism accommodation supply and greater promotion of related outdoor activities and attractions such as the Barrow Way and South Leinster Way walking routes.

3 DEVELOPMENT CAPACITY & CONSTRAINTS

3.1 To appreciate the development potential of Graiguenamanagh/Tinnahinch, it is important to understand the level of physical, social, economic, community, cultural infrastructure and services that are available in the Town and what is proposed in development plans and strategies. These will influence the development capacity and potential of Graiguenamanagh/Tinnahinch. To assist the direction of future investment, this section examines the development capacity of the Town and the potential and issues which prevail under the following headings:

- i. Residential;
- ii. Industrial/Business;
- iii. Retail & Commercial;
- iv. Social Services & Community Facilities;
- v. Education;
- vi. Roads & Access;
- vii. Sanitary Services;
- viii. Energy & Telecommunications;
- ix. Policing & Security;
- x. Derelict Sites;
- xi. Heritage & Natural Amenity; and
- xii. The Town Renewal Scheme.

3.2 Prior to setting out the detail of each of the above it is important to highlight that, since the inception of the study, progress has been being made with important investment having been delivered in the introduction of broadband to the Town and in amenity improvements. Additionally, public sector investment is set to continue with plans advancing to improve the road infrastructure, water services and amenities available to residents of the Town. Progress has, therefore, importantly not been halted in the interim period which is a demonstration of the commitment of the Councils to ensuring the mechanisms are in place to secure the long term sustainable regeneration of the Town.

RESIDENTIAL

- 3.3 The Housing Land Availability return form to the Department of the Environment, Heritage and Local Government (DoEHLG) of June 2004 and the Tinnahinch Local Area Plan (LAP) Zoning Map identifies 31 hectares (ha) of land zoned for residential development in the Town. Of this, 21ha are located in Graiguenamanagh, with the remaining 10ha in Tinnahinch. Assuming an average residential density of 24.3 units per ha, there is sufficient land zoned in the Town for an additional 756 residential units with potential to increase the population by approximately 1,900 which is not far short of a doubling of the 2006 population of the Town.
- 3.4 Land availability has to be set in the context of current market activity and housing demand. There has been until recently limited demand for large scale residential schemes in the Town which can largely be attributed to poor road connections to Carlow Town and Kilkenny City combined with the lack of employment opportunities or industrial market demand. It has typically been for one off housing in the surrounding countryside or small schemes of less than 5 units within the Town. This position appears to have considerably changed with the commencement of the construction of a 67 unit scheme in Graiguenamanagh which importantly indicates new market confidence in the potential of the Town. Although the evidence is that demand is generally locally driven and hence small scale, the size of this scheme would indicate a wider perspective/market view. **It could provide an important catalyst for additional residential market interest in the Town if given the right marketing profile and this requires to be discussed with the developer.** In addition to the main home market, our market research has identified that there may also be potential in the future in the tourism market sector. It may take time for the momentum to gather pace and the Town establishing itself in the wider than local residential market. As such, given the facts and assessment of prevailing trends, it is clear that at present there is sufficient land zoned for residential development to accommodate the long term growth of the Town and zoning is not a constraint on settlement growth. It is a position which will, however, require to be monitored.

INDUSTRIAL/BUSINESS

- 3.5 There are two parcels of land in Graiguenamanagh zoned for industrial uses which have a total area of 1.5ha. These are located south of High Street and east of the Borris Road at Harristown. In Tinnahinch, 4.5ha of land are zoned for industrial purposes to the east of town and encompass the Glanbia depot.
- 3.6 There is limited market demand for industrial/business space in the Town and that

for offices is limited to local services such as estate agents, solicitors and doctors. At a time of economic boom around the country, market demand and development in the Town failed to emerge to any great extent even with tax incentives available under the TRS. While weight is given to small towns and villages in Ireland's economy in both the NSS and SERPG, the Town are not identified as a priority for public sector funds for servicing sites or building industrial or business space. The sites are there and the zonings are in place and thus they are not constraints to economic development – it is simply lack of demand.

RETAIL & COMMERCIAL

- 3.7 Graiguenamanagh is the main shopping and services centre of the Town. The shops are primarily located on the west bank of the River Barrow along the Main Street and High Street Axis. There are two symbol group convenience stores and, in terms of comparison floorspace, two clothes shops, an antiques shop, several hardware stores, an electrical appliance store and a range of gift and book stores. There has been a growth in the number of bookstores, spawned by the successful community organised annual book festival. Tinnahinch has a very limited retail and services offer, comprising only a convenience top-up shop and a small Texaco petrol station forecourt outlet.
- 3.8 Detailed information on the retail profile off Graiguenamanagh is available from the *'Review of the Kilkenny Retail Strategy'* which was undertaken by DTZ Pieda Consulting in 2004. Table 3.1 presents the changing profile of retail floorspace in Graiguenamanagh between 2001 and 2004.

Year	Convenience	Comparison	Bulky Goods	Vacant	Total
2001	810	955	0	60	1,825
2004	715	1,370	0	161	2,246

Source: DTZ Sherry Fitzgerald Surveys 2000 and DTZ Pieda Consulting Surveys 2004

- 3.9 Retail floorspace in Graiguenamanagh increased between 2001 – 2004 from 1,825m² to 2,246m², some 23%. Of the total floorspace in 2004, 32% was convenience, 61% comparison and there were vacancies of 7%, a level that would not generally raise concern. Further analysis of the data indicates that, between 2001 – 2004, the level of convenience floorspace declined by 12% and comparison increased by the order of 43% with the latter reflecting the increase in gift shops, hardware stores and bookshops.

- 3.10 The Review of the Kilkenny Retail Strategy reconfirmed the designation of Graiguenamanagh as a Tier 2 Level 2 Sub County Town in the County Retail Hierarchy. Centres at this level in the hierarchy would generally be locations for new middle order convenience and tourism related comparison floorspace. The '**Carlow Local Authorities Retail Planning Strategy**', as adopted in the 2004 Carlow County Development Plan, does not specifically identify Tinnahinch or in fact other centres of its level in the County Retail Hierarchy. In both strategies, it is a general objective to sustain the level of shops and local services in small towns and to seek the re-use and regeneration of existing land and buildings within the heart of such centres.
- 3.11 The floorspace data indicate that the Town, and specifically Graiguenamanagh, witnessed strong comparative growth in their retail offer in the period 2001 – 2004. However, further examination of the figures and their implications identifies that there are mixed messages from the trends which appear to be growing, accepting that this is over a relatively short timescale:
- The decline in convenience floorspace should be a concern, noting that it is not unique to the Town but a common trend in many small towns and villages. Local people are therefore increasingly having to travel to meet their main food shopping needs which:
 - Socially excludes those who do not have access to private transport and social exclusion is further reinforced by the relative paucity of local bus services
 - Convenience expenditure potential is being lost from the local economy with implications for local jobs, particularly given the importance of employment in the retail sector in the Town
 - The propensity for linked shopping trips, combining main food shopping with comparison, further enhances the incidence of retail expenditure leakage with potential consequences for the sustainability of local comparison shopping and other local services.
 - The increase in comparison floorspace is positive overall but there are a mix of issues and opportunities that emerge from this which would summarise as follows:
 - The additional floorspace is creating new jobs be these full or part time
 - There is market interest and demand in new comparison floorspace which is enhancing the vitality and viability of Graiguenamanagh and helping, to a degree, to offset the decrease in convenience floorspace
 - There is an general erosion of comparison floorspace that specifically meets local needs – people are having to travel to meet the majority of their comparison needs with expenditure leakage and social exclusion increasing – which again is not unique to the Town
 - There has been a growth in floorspace that is geared towards the visitor which serves to increase the profile and attraction of the Town as a tourist destination with direct, indirect and induced economic benefits to the local economy

- The increase in the profile and attraction of the Town has the potential to be a catalyst for other niche/tourism related retail and other investment and this requires to be harnessed and encouraged.

SOCIAL SERVICES & COMMUNITY FACILITIES

- 3.12 Within the Town, Graiguenamanagh is the focus of the social and community infrastructure and provides the following range of services:
- i. A **library** with a stock of 20,000 books, 4 computers with internet access and 3 staff;
 - ii. A **health centre** with three General Practitioners. Mental health services are provided on an outreach basis;
 - iii. An **elderly care** centre at Gahan provides full board for 20 residents; and
 - iv. A well used and much needed **parish hall** which is in need of extensive repair and modernisation.
- 3.13 In addition, planning permission has been granted to convert the disused oratory in the convent to an auction room, art gallery and conference centre. This will serve address local needs but will also make an important contribution to further enhancing the profile and attraction of the Town as a tourist destination.
- 3.14 For their combined size, there is a relatively good level of provision of community and social services. However, due to poor road communications and public transport, the Town is severed from a number of key services which are only available in the higher order centres of Carlow Town and Kilkenny City and the mechanisms of how to redress this require to be addressed.

EDUCATION

- 3.15 The Town has two primary schools with a combined pupil population in 2004/5 of 228 pupils and one secondary school with 88 enrolments in 2004/5 academic year. The three schools are based in Graiguenamanagh. Duiske College, the secondary school, provides a small range of adult education courses with subjects including Information Technology, Arts and Crafts and Business Studies. These are run by the Vocational Educational Committee.
- 3.16 The level of provision is consistent with the critical mass of population in the Town and its catchment area. To gain access to third level education and Government run and sponsored training courses, local people have to travel – a fact that is not unique to small rural communities. The Carlow Institute of Technology and Carlow College

are the closest third level institutions and the nearest FAS training facility is in Kilkenny City. Critically, and as highlighted in the SERPG, is the fact that there are no universities in the South East Region and thus, local people have to leave the Region to obtain a university level education. Waterford is the only regional capital which does not have a university. Although Waterford Institute of Technology (WIT) provides both undergraduate and postgraduate courses, it is recognised that the lack of a university is a significant gap in the Region's infrastructure and potential attraction for living, working and investing in. While FAS and other agencies can provide training in the area on an outreach and an ad hoc basis, there is an issue in respect of the numbers interested and, thus, the financial feasibility of running the courses.

- 3.17 The facts, in respect of both vocational training and third level education, underpin the profile of low educational attainment that prevails in those living in the Town against that at the national and regional levels. This is compounded by the lack of employment opportunities and specifically higher value jobs available locally. Generally, local people are having to leave the area for higher level education and to pursue professional, technical and skilled job careers or are at best commuting to Carlow Town, Kilkenny City and other higher order centres. How this is redressed is a difficult issue and may be beyond what is realistically achievable but it is one that requires to be further examined.

ROADS & ACCESS

- 3.18 The Town is located at the junction of two regional roads, the R703 which links to other regional routes towards Wexford in the east and Thomastown and Kilkenny City in the west and the R705 linking the Town with New Ross and Bagenalstown to the south and north respectively. As a result, traffic congestion in Graiguenamanagh is an issue which should be alleviated following the completion of the Town's Western Relief Road. Construction of the Relief Road is due to commence in Autumn 2006. Once the road is completed, it is intended that a Traffic Management Plan, including identification of off street parking, will be prepared for the Town. There are no road proposals or traffic management plans currently proposed for Tinnahinch. There are no publicly provided bus services to the Town. However, a private bus operator provides two to three services per day linking Graiguenamanagh – Goresbridge – Gowran to Kilkenny City.
- 3.19 The poor road connectivity and public transport services inhibits the residential and investment/employment attraction of the Town for living and business development/other employment generating investment. A critical factor is the Town's relative distance and accessibility to any National Primary Road and redressing this is not a priority in any national, regional or local road investment programmes for the foreseeable future. However, while the Town is at the periphery of both counties Carlow and Kilkenny, it is at the junction of two regional roads and

not wholly peripheral in the sub-regional context. The potential of how this is better profiled and sold requires to be given 'creative' thought.

SANITARY SERVICES

- 3.20 Water is supplied to the Town from the Graiguenamanagh water supply scheme. Likewise, sewerage from Tinnahinch is pumped to Graiguenamanagh for treatment. The sewerage of the Town is treated in Graiguenamanagh. Kilkenny County Council is currently assessing the sanitary services needs of a number of towns in the County, including Graiguenamanagh. Once complete, it is envisaged that improvements to the water services in the Town will commence as a priority. As a result of both existing provision and committed investment, water and sanitary services infrastructure in the Town will not constrain development and expansion of Graiguenamanagh/Tinnahinch in the short to medium term.

ENERGY & TELECOMMUNICATIONS

- 3.21 Investment in energy and communications are demand driven. The Town is currently served by a 38kv electricity supply but gas supplies are not available. The limited capacity of energy supplies will limit the scope of the Town to accommodate specific industrial sectors, particularly manufacturing. At the time that the Draft Final Report was circulated in May 2005, there appeared to be little prospect for the Town and catchment area being included in the roll out of broadband infrastructure in the Region and this was identified as an issue in respect of the area's attraction and potential. Reflecting the competitiveness and potential of the sector, this issue was redressed by the introduction by Eircom broadband telecommunications services to the Town in February 2006.
- 3.22 The conclusion is that energy infrastructure will constrain the economic development and potential of the Town. As a result, it is unlikely that the Town would be the focus of any realistic interest from major domestic or Foreign Indirect Investment (FDI) floating investment particularly given the competition from higher order centres and the strategic priorities set out in the NSS and SERPG and, as such, the demand criteria of the energy industry will not be met. However, we are advised that, should the demand transpire, the ESB will provide an adequate energy supply needed to cater for industrial needs. This noted, what is important is boost to the Town and its attraction, particularly in respect of digital industries and home working, of the introduction of broadband.

POLICING & SECURITY

- 3.23 The local 24-hour Garda Station in Graiguenamanagh has a resident staff of two Gardaí. It is part of a network of stations of which the district headquarters is located in Thomastown. This facilitates the Gardaí to increase their presence in the Town subject to demand/need. While some anti-social behaviour is experienced in the Town, we are advised that this is not a significant problem. Founded on our consultations, these may be addressed by environmental improvement works with the provision of additional lighting provided as an example – essentially very basic responses. There are no plans to provide more policing in the area which would generally not be anticipated in centres with low crime profiles.

DERELICT SITES

- 3.24 A total of 20 sites are listed on the register of derelict sites as required under the Derelict Sites Act 1990 (DSA). Of these sites, 16 are located in Graiguenamanagh. The majority of the sites were designated under the TRS. The other 4 sites are located in Tinnahinch. Of these sites: housing developments were completed on two; the third is a public house; and, the fourth remains undeveloped.
- 3.25 The DSA obliges every owner or occupier of land to take reasonable steps to ensure that land does not become nor continue to be a derelict site. However, it does not compel the owner or occupier to restore the site/building. Importantly, the DSA enables a local authority to acquire the site by agreement or by compulsory acquisition. In addition, the local authority can impose annual levies on the owner or occupier of derelict sites in the urban areas.
- 3.26 The level of derelict sites negatively influences the general ambience and attractiveness of the environment of the Town but, positively, they also yield a number of development opportunities. Furthermore, the DSA provides the Councils with mechanisms by which these derelict sites can be transformed into opportunity sites – with the local authorities working with private sector developers/investors and landowners. The scope for this has not been pursued by the Councils and the potential for this, particularly in respect of key buildings and lands, needs to be identified. This, however, requires to be put in the context of the known difficulties in identifying ownerships and legal title that have been found to prevail in the Town and which ultimately constrained the TRS being as effective in its objectives as it might have been. Again, it is important to highlight that these issues are not unique to the Town but have prevailed country-wide.

HERITAGE & NATURAL AMENITY

3.27 The key assets of the Town and its catchment area are founded in their nationally and internationally renowned but relatively untapped heritage and natural environment which comprises an abundant and important mix of attractions and potential as summarised by the following:

- Duiske Abbey
- The Graiguenamanagh/Tinnahinch Bridge
- Tinnahinch Castle
- The streetscapes
- The Barrow Navigation
- The Barrow and South Leinster Waymarked Ways
- The River Barrow and River Nore Special Area of Conservation
- The attractions of Borris and St. Mullins.

Heritage

3.28 **Duiske Abbey** is the key architectural and townscape feature in Graiguenamanagh. It is believed that construction commenced in 1204 and by 1228 it was the largest Cistercian building in Ireland. The Duiske Abbey Complex, excluding the church, is under the ownership of the Office of Public Works (OPW) and the Abbey is subject to a preservation order under the National Monuments Act 1930 – 1934. Conservation works at the complex were undertaken in 1990s and were continued in 2003, with the delays due to uncertainty of landownership. An interpretative centre/visitor centre provides information on the complex. Admission to the centre is free. Visitor numbers to the centre are not recorded.

3.29 The **bridge** linking Tinnahinch and Graiguenamanagh was originally constructed in 1797. Its' historic and townscape importance is celebrated and it is floodlit at night.

3.30 **Tinnahinch Castle** was built in 1615 by James Butler, Duke of Ormonde, who subsequently lost his lands due to his involvement in the Confederate War of 1641. The castle was burnt down in 1700. Now a ruin, the castle is not listed in the Carlow County Development Plan. However, it is of historic importance and is a significant feature of the landscape of the Town.

- 3.31 Neither Graiguenamanagh nor Tinnahinch are centres that have witnessed development pressures which have changed their inherent **qualities or heritage townscapes**. These characteristics have considerable value and importance in respect of their potential and how best this is harnessed.

Natural Environment & Infrastructure

- 3.32 The location of the Town on the River Barrow provides access to the **Grand Canal – River Barrow Navigation** inland waterway. The Barrow Navigation links the Town with St. Mullins to the south and Athy to the north. At Athy, the Navigation links with the Grand Canal which extends from County Kildare through to Dublin City and the sea. There are two dry docks in Graiguenamanagh, both of which have fallen into disuse. Waterways Ireland is currently dredging and examining the current conditions of the dry docks. The agency has made some improvements to the dock facilities and waterways amenities in the Town, including those to the bathing area 'the Sands' and investment in a substantial quantum of berthing facilities. However, to harness the full potential of this valuable resource will require further investment, for example the development of a marina or the improvement of the dry dock facility. Importantly, both of these are being investigated or advocated by Waterways Ireland.
- 3.33 The **South Leinster Way** extends 102km which runs from Kildavin in County Carlow to Carrick on Suir in County Tipperary. The **Barrow Way** is a 113km walk from Lowtown in County Kildare to St. Mullins in County Carlow. These Waymarked Ways provide well defined top class walking routes for walking enthusiasts visiting the area. Both of routes meet in the Town and thus provide important potential for marketing, promotion and both public and private sector initiatives and commercialisation.
- 3.34 The **River Barrow** starts at distance upstream in the Slieve Bloom Mountains and extends far downstream to Creadun Head in County Waterford. It forms part of the River Barrow and River Nore Special Area of Conservation (SAC) which is identified as a prime wildlife conservation area. The Councils recognise the educational, scientific recreational and tourism value of this area but to date there has been limited investment in the interpretation and promotion of the asset which is an opportunity that requires further examination.

The Surrounding Area

- 3.35 There is a wealth of heritage and natural amenity in close proximity to the Town. Of particular note are the towns of St. Mullins and Borris, both of which are in County Carlow. Along with Graiguenamanagh/Tinnahinch, both of these towns are located on the Barrow Navigation Waterway and the Barrow Waymarked Way. The key

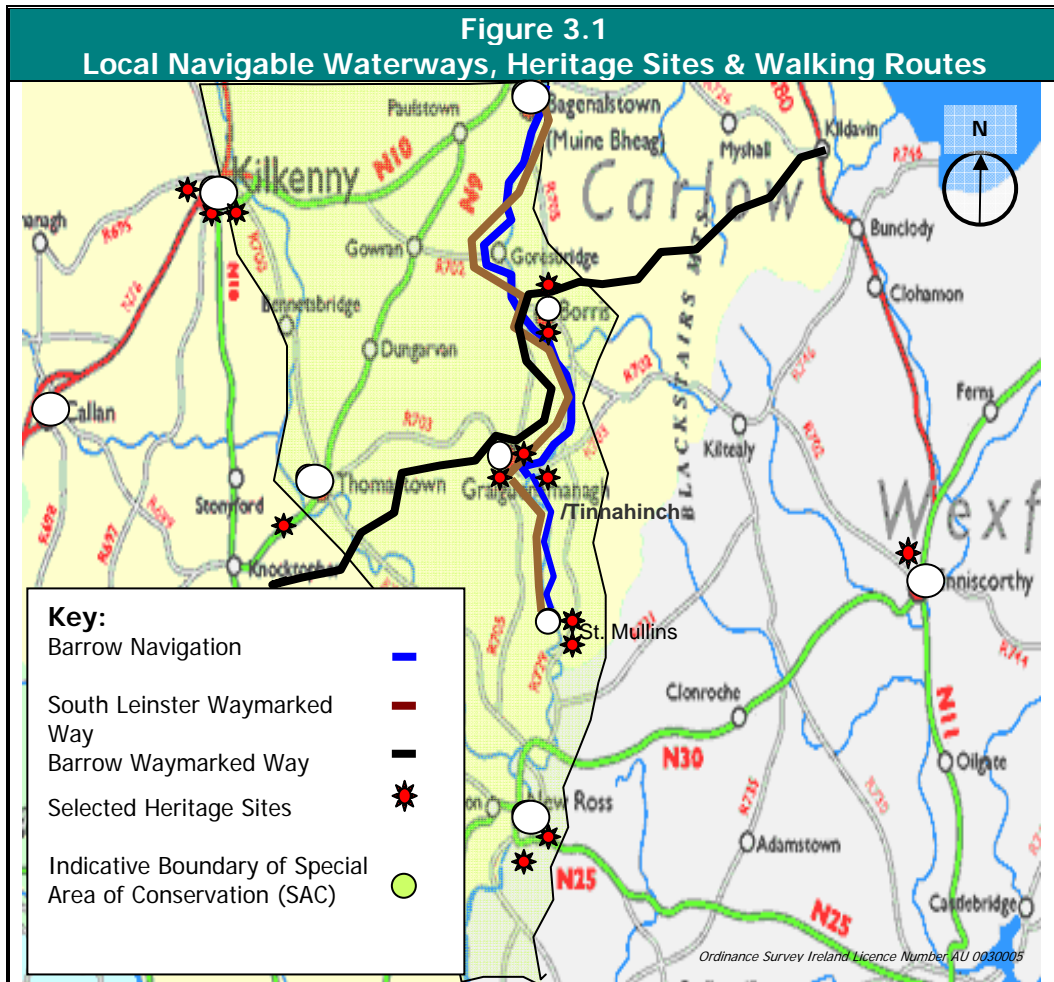
features of the towns are:

- i. **St. Mullins:** boasts an impressive ecclesiastical history dating to the 7th Century. The town hosts the ruin of a medieval church, the base of a round tower, a Church of Ireland church and a 9th Century Celtic Cross; and
- ii. **Borris:** has a number of points of interest. The traditional shop fronts make the town an attractive place for visitors. Borris House was built in Tutor style and is open to groups by prior arrangement. The town also has a prominent 16-arch viaduct which is set against the backdrop of the Blackstairs Mountains.

3.36 There is potential for the Town to act as a **hub for tourism/visits to the area**. This is reflected in by the fact that:

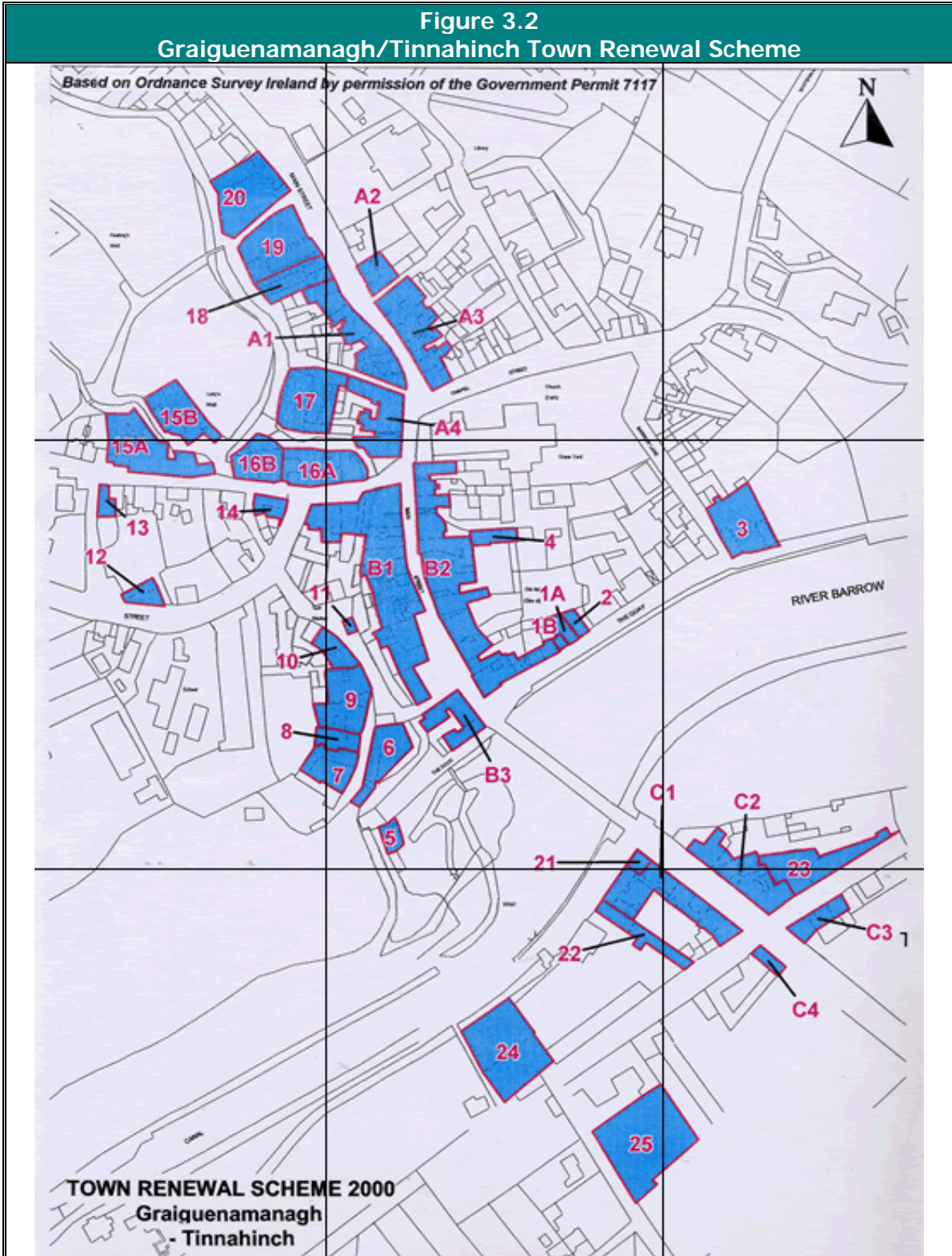
- It is located at the meeting point for the Barrow Navigation and the South Leinster and the Barrow Waymarked Ways
- It is centrally located between the complementary towns of Borris and St. Mullins
- Offers a range of accommodation, cafes, bars and restaurants to visitors, making it an attractive base for holidays and short term breaks.

3.37 Properties owned by the Councils or the OPW provide potential for development and/or enhancement of the area's offer, subject to feasibility assessments, for interpretive centres, quality services for walkers or for those engaging in water based activities. Figure 3.1 identifies the assets of the surrounding area.



TOWN RENEWAL SCHEME

3.38 Figure 3.2 identifies the location of the 25 sites in the Town which were designated under the TRS. Sites 1 to 20 are located in the Kilkenny County Council administrative area with the remaining 5 sites in County Carlow.



- 3.39 Since the inception of the TRS in 1999, market interest in investing in the Town was evident, although relatively limited when set against potential. This is aptly reflected in the fact there were only nine planning applications lodged to the Councils to develop designated sites before the deadline of 31 December 2004, in part fulfilment of the requirement of the scheme. While planning applications received by the Councils are illustrative of the level of opportunity identified by the private sector, this may not transpire and the full impact of the scheme will not be clear until the 31 December 2006 deadline has passed. It is acknowledged that a number of applications were likely to have been made speculatively and to ensure that the benefit of tax relief was secured whether or not there was a decision to proceed with the proposal. This approach was common across the country on all the different tax incentive schemes and not specific to the TRS or the Town.
- 3.40 However, to date only two of the sites have been developed, providing six townhouses and the refurbishment of a shop. The other planning applications on TRS designated sites are not advancing either because they failed to obtain planning permission or the project promoter has decided not to proceed. We understand from our market consultation that sales of the residential units are slow, reflecting low demand for this type of housing in the local market and this is likely to have an influence on further schemes coming forward which include the following:
- i. Development of a bar at Main Street, Graiguenamanagh;
 - ii. Development of a shop and residential accommodation at Upper Main Street, Graiguenamanagh; and
 - iii. Development of 8 duplex apartments in Tinnahinch.
- 3.41 The review indicates that to date limited investment has actually occurred in the Town as a direct result of the TRS. We understand that the level of investment attracted to the Town under the scheme reflects the experience of comparable towns throughout Ireland. This is the case in County Carlow where a review conducted by the County Council in 2003 found that the limited uptake would appear to be as a result of flaws inherent in the actual scheme and its promotion. This was certainly confirmed in our consultations with the community – many property owners did not know that their premises/lands had been designated. In addition, the assessment also found that owner occupiers were unwilling to invest due to personal or family circumstances and an unwillingness of owners to dispose of sites. Finally, an important factor, again not unique to the Town, was the issue of uncertainty in respect of building/site ownership which greatly constrained both uptake and development proceeding as envisaged under the scheme.

4 CONSULTATION PROCESS

4.1 The different components of the baseline review and assessment provide a sound insight to the potential and issues that prevail in the Town which require to be harnessed or addressed. To move forward in preparing the right response, this insight requires to be informed and balanced with inputs from all stakeholders to ensure that any emerging strategy for the sustainable economic, social and cultural development of the Town is realistic and realisable. This is particularly important given that the local community and development agencies have traditionally played a key role in the delivery of social, cultural and economic projects and initiatives in the Town. To achieve this, a key part of the study was wide ranging consultation with key players and organisations from the community and the public and private sectors. The consultation process did not start with a blank piece of paper but built on the extensive community consultation which informed the preparation the **'Graiguenamanagh-Tinnahinch Community Action Plan 2003 – 2008'** (the Action Plan) and included consultations with:

- i. Representatives of the local communities;
- ii. Elected Members of both Councils who represent the area;
- iii. Planning, Engineering and Community and Enterprise Officers of the Councils;
- iv. Staff of local groups including LEADER, County Tourism Committees etc;
- v. Officers of both Carlow and Kilkenny County Enterprise Boards;
- vi. Staff of Enterprise Ireland;
- vii. Representatives of IDA Ireland;
- viii. Representatives of Waterways Ireland; and
- ix. Local estate agents and auctioneers.

4.2 Informed by the baseline review and assessment, consultations focussed on the following themes:

- Social & Community Needs
- Enterprise & Economic Development
- Tourism & Culture.

SOCIAL & COMMUNITY NEEDS

- 4.3 The Action Plan identified a suite of projects and initiatives designed to enhance and build on the social and cultural assets of the Town and meet the social and community needs of Graiguenamanagh/Tinnahinch. These included:
- i. Improvement of the provision of adult education opportunities;
 - ii. Provision of suitable facilities and supports for the youth of the Town;
 - iii. Re-establishing the children's playground;
 - iv. Improving the quality of the sports facilities; and
 - v. Enhancing the level of services provided for the elderly.
- 4.4 Consultations revealed that a number of these initiatives have advanced. However, those consulted indicated that there was a need to develop additional facilities including:
- An indoor multi-purpose hall with meeting rooms a kitchen and changing rooms
 - Outdoor pitches and courts
 - Play and recreation area.
- 4.5 At present, the only community facility in the Town was the Graiguenamanagh Parish Hall and it was identified as a key community asset. The hall serves as a multi-purpose facility with over 270 local people per week using it which illustrates a high level of demand. The estimated breakdown of usage is:
- i. Aerobics: 20 – 25;
 - ii. Badminton: 40+;
 - iii. Boat Club: 20 – 25;
 - iv. Brownies: 40;
 - v. Drama Club: 10;
 - vi. Duiske College - Pioneer: 60;
 - vii. Local Soccer: 40; and
 - viii. Scouts: 40.

- 4.6 The hall has been falling into considerable disrepair over recent years, has water leakage problems and emerging health and safety issues which ultimately could result in the closure of the building for local activities and public events. This had in fact already occurred with the cancelling of the Griag800 Festival Banquet which was programmed to take place in the hall. In the absence of any alternative, the closure of the building would be a major loss to the community. It would also become an increasing eyesore with its future under threat due to the continuing deterioration of the structure. A key issue undermining any initiatives to secure funds for repairs and refurbishment is the lack of clarity of ownership of the Parish Hall – an issue that was found to prevail with many of the TRS buildings. This is an issue that requires to be addressed.
- 4.7 In general, local people believed that the Town was poorly served in the provision of community facilities, and in fact public sector investment and initiatives in general, when compared to other towns and villages in Carlow and Kilkenny. It was believed that two factors underpinned the lack of public sector investment:
- The Town's peripherality within both of the counties respectively
 - The lack of a strong political voice during the 1990s – the Town had fallen behind other towns and villages although it was acknowledged that this was being redressed in more recent years.

Community Structures

- 4.8 The Action Plan recognised that local groups in Graiguenamanagh/Tinnahinch were working on a variety of fronts to improve the quality of life and social, cultural and recreational facilities in the Town but that there was a need for a more co-ordinated approach to maximise the impact of their efforts. In response, a community forum has been established – Graiguenamanagh/Tinnahinch Area Council (GTAC) which is being incorporated as a Company Limited by Guarantee. The Action Plan also recommended that a number of sub-groups with set remits be established under the umbrella organisation. The consultations revealed that the sub-groups that had been established were the following:
- i. Enterprise Group;
 - ii. Tidy Towns/Environment Group;
 - iii. Social & Cultural Group; and
 - iv. Sports & Health Group.
- 4.9 The Enterprise Group's remit is the promotion of economic development in the Town and it is recognised as being proactive in pursuing its remit. The objectives are: to attract more businesses to or develop in the Town; to seek a waiver on business

rates to improve the attraction of the Town to businesses, existing and new; to have a brochure produced to market the Town; to improve the amenities of the Town for living, working and leisure/tourism; and, to involve both Councils and other economic development/enterprise agencies in achieving the economic development of the Town. The sub-group recognises that a key area of economic potential is tourism and, while there have been improvements to the Town's offer, the opportunities and potential have not been maximised.

- 4.10 It is clear that progress has been made since the Action Plan was produced. However, the consultations revealed that key groups and stakeholders were not working together and had different views and potentially different priorities. This presents a barrier to full potential being achieved. There is a need for a partnership approach involving commitment from the public, private and voluntary/community sectors and, from the consultations, this requires to be facilitated by the public sector and set down as a requirement for moving forward by the Councils. Based on other community partnership models and initiatives, and acknowledged by the community and the Councils, the community and local businesses need more support from the public sector, specifically in the form of a Community Development Officer. This resource has been promised but to date the promise has not been delivered.

ENTERPRISE & ECONOMIC DEVELOPMENT

- 4.11 The relatively poor economic performance of the Town is well recognised by local people and questions are asked on why Borris and Bagenalstown have attracted business development and expansion and Graiguenamanagh/Tinnahinch has not. The community believes that there is scope to improve the level of economic activity and employment opportunities in the area. However, there was also a real appreciation among all consulted that a number of challenges needed to be addressed if the potential employment and enterprise development opportunities of the Town are to be harnessed. These were:

- Infrastructure & Access
- Incubation & Supports
- Entrepreneurial Orientation
- Labour Market & Skills.

Infrastructure & Access

- 4.12 Those consulted reiterated the constraints to the economic development of the Town stemming from poor road access to larger centres/the wider national, regional and local economy and deficiencies in energy supply and telecommunications

infrastructure which had been found in the baseline review and assessment. As has been highlighted, since the consultation the level of telecommunications services has improved with Eircom introducing broadband to the area. In addition, since then, the implementation of development of the Graiguenamanagh Western Relief Road has now been set as commencing in Autumn 2006. There is, therefore, an enhanced opportunity to build on the momentum that has gathered and the level of public sector investment that the Town has witnessed and will continue to attract. The outputs from this study are set to inform this process and assist in the prioritising of the initiatives required.

Entrepreneurial Orientation

- 4.13 While a number of small businesses operate in the Town and its catchment area, the development agencies receive a low level of requests for supports from start-up businesses in the area. From our consultations with the development agencies, we are informed that this could be attributable to a number of influences/factors:
- i. Businesses setting up in the Town are not eligible for grant assistance under the various measures of the development agencies;
 - ii. There are constraints to enterprise development in the Town;
 - iii. There may be a lack of entrepreneurial orientation or business opportunities in the Town; and
 - iv. There is insufficient awareness of the supports that are available to businesses.
- 4.14 The development agencies expressed a willingness to strengthen enterprise advocacy in the Town, potentially replicating the model used as a response to the job losses in Castlecomber, whereby the development agencies provided funding to employ a dedicated Development Officer for the town. In addition, both Carlow and Kilkenny Enterprise Boards agreed that they would give the Town a more hands on approach to enterprise development and training, with scope for both Boards to work together in delivering greater commitment.

Incubation & Supports

- 4.15 Representatives of the community and businesses indicated that there are insufficient supports for business start-ups in the Town. They identified the opportunity to allow the IDA property in Graiguenamanagh to be used to provide incubation units. From our consultations with IDA Ireland, Enterprise Ireland and the County Enterprise Boards, there is scope to further investigate this opportunity. However, the provision of incubation space would have to be justified on demand for such space in the area, acknowledging that both Carlow and Kilkenny County

Enterprise Boards have developed incubation units in Carlow Town and Kilkenny City respectively and neither of these is fully occupied.

- 4.16 The community representatives indicated that local residents/businesses are unaware of the level of supports available to set up businesses or invest in the Town. They recommended that the development agencies undertake a programme of promoting both commercial opportunities and supports available to businesses in the area. The scope to positively respond to this was confirmed by both County Enterprise Boards.

Labour Market & Skills

- 4.17 It was acknowledged that the relatively low level of educational attainment of the local population was a disadvantage which inhibited the potential of the Town to either attract inward investment or develop added value indigenous enterprises. Representatives of the Enterprise Group highlighted that key professional jobs in Graiguenamanagh/Tinnahinch were not benefiting the Town and the local economy as best they could as the overwhelming majority of teachers, Gardai and bank staff did not live in the Town.
- 4.18 Apart from the above, there is a low level of take up of adult training courses at Duiske College. In addition, both LEADER and the County Enterprise Boards offered specific supports to those who wished to engage in education and training outside of the Town but take up was low. This characteristic is not unique to the area and is experienced in towns and villages throughout Ireland. However, consultees responded by questioning how the training was being marketed and local people being made aware of what is available and when. It is, thus, an issue which requires to be redressed in the overall equation of economic and enterprise development in the Town.

TOURISM & CULTURE

- 4.19 Consultees unanimously agreed that the area offered a wealth of culture, heritage and natural amenities. The celebration of 800 years of the foundation of Duiske Abbey – Graig800 – provided the impetus needed to focus the community's efforts on the promotion of the Town. Community commitment is also reflected in the continuing success of the annual book festival. The community representatives expressed enthusiasm for the opportunity to develop the tourism offer of the area building on its current strengths.
- 4.20 The local tourism committees indicated that, while independently the Town benefits from a wealth of heritage and natural amenities, there is scope to enhance the

potential of these by consolidating the complementary assets of neighbouring centres such as Kilkenny City and more locally those of Borris and St. Mullins. It was recognised that the natural amenities, the walkways and the Navigation provided considerable potential but they needed to be developed and promoted along with the required supporting tourism and services infrastructure. Real scope was identified for the Town to be developed as the recognised main service centre in the area for both walkers and those enjoying the inland waterway with services to include berthing facilities, showers, drying facilities etc as well as places to eat and sleep. In respect of the Navigation, this potential is already recognised by Waterways Ireland and investment has taken place or is programmed on berths, restoration of the dry dock and assistance to the Boat Club. The new berths have all been fully occupied and have brought an additional 80 – 100 boats to the Town which is an important boost to the local economy and the raising of its profile as a tourism destination.

4.21 Consultees highlighted that there is an attractive mix of restaurants, pubs and cafés in the Town and this could be improved should the commercial tourism potential of the Towns' heritage, walkways, waterways and events be fully developed and harnessed. There were concerns that potential would not or could not be maximised due to the following factors and issues:

- The environment and prevalence of derelict land and buildings detracted from the ambience and attraction of the Town
- The lack of available and suitable sites/buildings and the issue of landownership preventing regeneration of land and buildings.

4.22 They saw that the real opportunity and potential of the TRS had been lost. Many landowners had not been aware that their building was included in the TRS and there had been no effective programme of raising awareness of the scheme. However, there was recognition that a fundamental issue was the lack of legal evidence of ownership – this was required to enable qualification for the scheme. In looking forward, it was an issue that had to be squarely addressed and this was highlighted as beyond the expertise or capacity of local people – the Councils required to take on board the issue and its resolution.

5 FRAMEWORK FOR ECONOMIC DEVELOPMENT & REGENERATION

- 5.1 The baseline review and assessment and the consultation process identified a wide range of initiatives that should or could help secure the sustainable social, economic and cultural development and regeneration of the Town. Based on comparable experience and studies from elsewhere in Ireland and the UK, the full achievement of the ambitions/potential of Graiguenamanagh/Tinnahinch will take a long time to be realised – essentially, there is no quick fix solution.
- 5.2 From the review and analysis, the economic drivers and opportunities that have emerged which provide the framework for the economic development and regeneration of the Town can be identified under the following:
- i. The Principles; and
 - ii. The Ingredients of the Model.
- 5.3 The themes are on the whole not new – many were identified within the Action Plan, reflecting the in depth appreciation of the Town and its potential by local people. Where the recommendations of the study differ from the Action Plan and subsequent initiatives being pursued by GTAC is that in addition to project definition/refinement they set out the steps and actions required to pursue and proceed to implementation and delivery.

THE PRINCIPLES

- 5.4 There is overlap in the objectives and sought outcomes of the different themes and, where appropriate, these are highlighted – they all form part of a holistic framework for securing the objectives of the study which can be summarised under the following Mission Statement:

'To secure the sustainable and long term economic development and regeneration of Graiguenamanagh/Tinnahinch by addressing the prevailing issues and harnessing the assets of the Town in a committed multi-sector partnership which develops, realises and delivers the potential of the unique characteristics of the Town and its catchment area and enhances their attraction for public and private sector investment and as a place for living, working and leisure/tourism.'

- 5.5 This, however, should only be taken to serve as a template for the Mission Statement of the Town. For a Mission Statement to have real commitment and local ownership, it must be one that is envisioned by local people and other stakeholders. To provide the mechanism to progress this and set up the structures to provide the

framework for economic development and regeneration, the starting point and focus in this section is the need to establish a truly multi-sector partnership with the specific projects and actions required for each of the different themed initiatives set out in subsequent sections.

- 5.6 A sustainable and holistic development and regeneration framework that delivers results will not be achieved by local people on their own or by initiatives being solely driven by the Councils and other public sector development agencies. There requires to be a real not token partnership that builds on the local partnership framework established by GTAC, addresses the issues that currently prevail in local initiatives and partnerships and drives forward the different projects and initiatives which will secure the objectives of the study. Of critical importance, it will require a long term commitment from all stakeholders – in particular the local community. Principles of community development have been tried and tested throughout the country and the challenge will be to apply the optimum local development model to implement the suite of initiatives required to harness the potential of the Town.
- 5.7 Looking to benefit from local experience, Graiguenamanagh/Tinnahinch could seek to replicate the Castlecomer model but adapted to respond to the bespoke requirements of the Town. The Castlecomer initiative was established in 2002 in response to the loss of 160 jobs in the sugar sector in the town. Although Graiguenamanagh/Tinnahinch has not witnessed sudden job losses, the population of the Town is in decline and by all benchmarks and standards its growth is lagging that of other parts of the two Counties. Thus, there is sound justification to implement a similar initiative in Graiguenamanagh/Tinnahinch. The approach is consistent with the objectives of the Kilkenny County Development Board which seeks to replicate the success of the Castlecomer initiative in towns throughout the County.

INGREDIENTS OF THE MODEL

- 5.8 An evaluation of the Castlecomer project was published in November 2005. This presented the ingredients required to successfully replicate the model in other areas. We concur with the recommendations of this evaluation. The evaluation report identifies that the key requirements needed to ensure that an appropriate development model can be implemented locally are:
- **Community Structures:** there is a need to ensure that the appropriate community structures are in place to drive the specific initiatives required to address the bespoke needs of the local area. In this respect, the Town is not starting from scratch. Work has already been initiated with the establishment of GTAG and its sub-structures. To ensure that progress is made in relation to the implementation of the suite of recommendations set out in this report, which are a result of consultation and participation by the local community and elected representatives, there will be a need to ensure that the community embrace the development objectives for the Town and,

where appropriate, take ownership and leadership of specific initiatives. Thus, it will be important for GTAG to consolidate and strengthen and where necessary refine its current structures or establish new structures to drive forward the social, economic and cultural development of the Town. Reflecting the sub-structures that are already in place and the range of projects and initiatives identified in the study, the following sub-structures require to be in place:

- Community Facilities & Amenity Action Group
 - Enterprise & Economic Development Action Group
 - Tourism Action Group
 - Regeneration Action Group
- **The Advisory Forum:** it is generally acknowledged that the community cannot work in isolation but will need support to pursue initiatives. This support will require to come primarily from public sector agencies. Establishing an Advisory Forum comprising representatives from the different public agencies would provide the local community with the supports and advice required to deliver a suite of specific projects. Both Carlow and Kilkenny County Enterprise Boards could provide an appropriate mechanism through which such activities can be promoted and managed.
 - **Staffing & Supports:** in the Castlecomber initiative, a Business Development Executive was employed to implement the range of interventions identified as necessary to address the particular issues facing Castlecomber. The suite of recommendations set out in this report will require support and guidance by staff of the local development agencies. This stated, there are two levels to the interventions that need to be implemented to harness the potential of Graiguenamanagh/Tinnahinch.
 - At the first level, locally there is a need to implement a range of projects such as the development of amenities, Council owned lands and enterprise initiatives in the Town.
 - At a second level, there is a need to consolidate the environmental and heritage assets of the surrounding area to deliver the critical mass required to ensure that an attractive package can be promoted i.e. the walkways, the waterway navigation and the heritage sites of the surrounding area.

These initiatives would benefit the community of the broader area. However, there is a considerable body work that would be beyond the resources or skills of one person acting alone. Thus, there is the need to implement an alternative solution to that pursued in Castlecomber where a dedicated Development Officer was appointed. Importantly, restructuring of local development approaches is currently being considered in both Carlow and Kilkenny and this requires to take into account how best local initiatives are best supported. Consultations with the Councils has identified that the restructuring envisaged may involve the merger of LEADER and Partnership Groups into one entity with local sub-structures. It is recommended that Graiguenamanagh/Tinnahinch is considered as a location/centre for such a sub-structure. This would provide the local community with local access to the combined

supports of these agencies and the local development agencies with an improved insight of the needs of the local community.

6 COMMUNITY FACILITIES & AMENITIES

- 6.1 The thrust of the study is to identify economic drivers and initiatives to help secure the economic development and regeneration of the Town and the sections that follow identify the projects and actions required to help achieve this objective. However, it is important to take one step back and question what ultimately the study seeks to achieve and what these economic development initiatives and supports will contribute to. The answer quite simply is quality of life and the creation of an environment that is attractive for living, working, visiting and investment.
- 6.2 By creating an enhanced quality of life then the attractiveness of the Town will improve as a place for living, working, visiting and investment. An enhanced quality of life will not be wholly achieved in a sustainable manner by only pursuing economic development initiatives – it also requires enhancement of the supporting community infrastructure and amenities in the Town which have been found in the study to be deficient when Graiguenamanagh/Tinnahinch is compared with other similar communities in Carlow and Kilkenny. The focus of this section is, therefore, on the community and recreational facilities and services which can be relatively quickly delivered and that will have an immediate and important impact on the quality of life of those living in the Town and its catchment area. These are outlined under the following headings:
- i. The projects; and
 - ii. Delivery.

THE PROJECTS

- 6.3 Founded on the Action Plan, consultations and the findings of the study, the suite of community facilities and amenities that could be delivered in the short to medium term include:
- A local park
 - Community hall
 - Local recreational amenities.

Local Park

- 6.4 The Town lacks the amenity of a local park which provides an attractive focus for both informal and formal recreation. In addition, the asset of the River Barrow has not been translated into a more formal amenity for local people and visitors.

- 6.5 Kilkenny County Council is currently progressing the development of a children's play area in the Town. In addition, Waterways Ireland has improved the bathing area 'The Sands' near Graiguenamanagh. Other appropriate scale amenities should also be considered to cater for the needs of the local community. Furthermore, there is scope and potential for this to be redressed on the Kilkenny County Council lands on the waterfront in Graiguenamanagh as part of a mixed use strategy for the site. The different components of the mixed use strategy are further examined in Section 10.
- 6.6 The components of what the local park should comprise should ultimately be determined in a masterplan for the site. The masterplan should both respect the amenity and asset of the Barrow and the heritage townscape of the Town's waterfront. Options and opportunities include:
- i. A formal landscaped park with a riverside walkway providing picnic and seating areas;
 - ii. Waterways infrastructure – consultation will be required with Waterways Ireland; and
 - iii. Formal recreational areas/areas for organised sport.
- 6.7 What is important is that they are recreational needs which do need to be met in the Town. They may not all be able to be met on the Council owned lands and, therefore, alternative locations also need to be identified and examined.

Community Hall

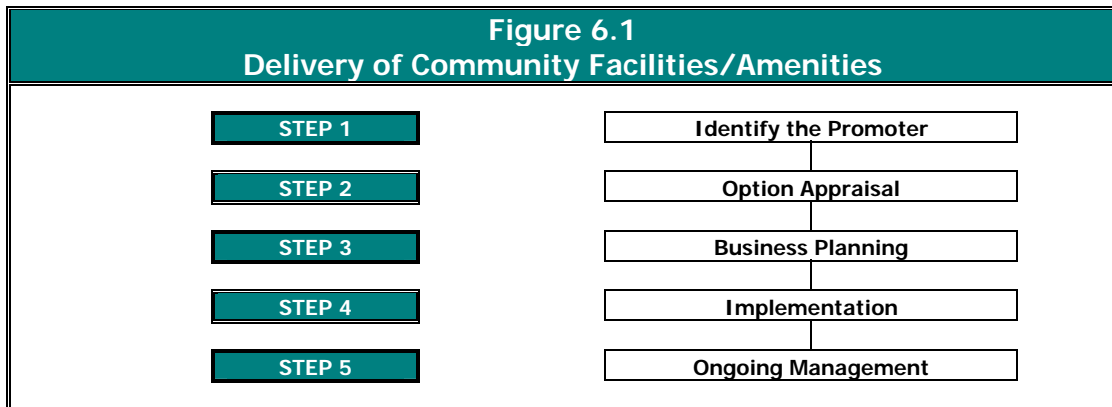
- 6.8 The Town is poorly served with indoor community facilities and the consultation process identified the need for provision to be enhanced. The demand comes from the users of the Parish Hall and Duiske College, which is seeking to provide improved sports facilities for its pupils. As has been highlighted, the poor state of the Parish Hall poses a very immediate risk of closure and the loss of any local indoor community facilities. The decision requires to be taken on whether it is feasible for the Parish Hall to be renovated and repaired to a modern standard that meets all health and safety requirements and in fact has a long term future for such uses or whether a new purpose built facility is the best option. We examine this further below. In respect of what is needed, whether within the Parish Hall or in a new building, we would identify the following:
- A multi-purpose sports hall
 - Meeting rooms
 - Changing and shower facilities
 - Kitchen.

Local Amenities

6.9 In addition to a local park which would provide a recreational focus for local people, there is scope to substantially build on the natural assets of Graiguenamanagh/Tinnahinch by providing recreational infrastructure such as formal paths, informal walkways, seating and picnic areas in key areas of the Town, for example on both banks of the river or at Tinnahinch Castle.

DELIVERY

6.10 Co-ordination of the delivery of the projects should be the preliminary remit of the Community Facilities and Amenities Action Group, supported by the Advisory Forum as appropriate. We highlight an emphasis on the prefix 'preliminary' as there will require continuous examination of the need for local community facilities and amenities over time. In Figure 6.1, we identify five stages to the delivery of these projects, each of which are outlined in the paragraphs that follow.



Step One: Identify the Project Promoter

6.11 Unlike the majority of other potential projects that have emerged from the study, those under the theme 'Community Facilities & Amenities' will require to be driven by the local community working with the public sector, namely the Councils. In respect of provision and operation of the projects, there is scope for both the community and the public sector to have a role. Positively, based on the feedback in the consultation process, community representatives expressed a willingness to fulfil such a role. However, the local park and the Parish Hall/its alternative are relatively large projects and, as such, while there is an important role for the community this will only be enabled by support from public sector agencies. The key public sector agencies for the different projects are:

- i. Local park and other amenities – the Councils and Waterways Ireland; and
- ii. Parish Hall/its alternative – the Councils.

Step Two: Option Appraisal

6.12 The detail of the projects requires to be fully examined under the co-ordination of the Community Facilities and Amenities Action Group. This should comprise:

- **Local Park:** the design to be incorporated in the masterplan for the Council lands;
- **Parish Hall/Its Alternative:** requires an option appraisal to be undertaken; and
- **Other Amenities:** a recreational strategy incorporating paths, walkways, seating, picnic areas and signage requires to be produced.

6.13 In respect of the Parish Hall, as illustration of the commitment to the project, Kilkenny County Council is currently progressing its compulsory purchase to secure the hall's ownership for the local community. Whether it is ultimately the best option for the range of uses which require to be accommodated, this is an important step towards helping save this important building. This noted, the options which require to be examined are:

- i. Redevelopment/renovation of the existing Parish Hall; and
- ii. Construction of a new purpose built facility.

6.14 A comparative feasibility study of the two options needs to be commissioned which addresses the future use potential of the Parish Hall and establishes the specification of an alternative purpose built facility. The objective would be to provide a detailed basis for decision making on what the optimum option is. To this end, the brief for the feasibility study needs to have the following three dimensions:

- Future use appraisal of the Parish Hall
- Establishing the location and specification of an alternative purpose built facility
- Comparative assessment of the two options.

6.15 **Parish Hall Future Use Appraisal:** the brief requires to comprise the following components:

- i. A full structural survey of the building to identify what issues prevail;
- ii. An option appraisal of the potential uses – what community facilities could be accommodated taking due cognisance of all building regulations for public buildings and

facilities;

- iii. An alternative use appraisal – community and property market appraisal of alternative uses that would enable the structure to be retained if its use as a multi-purpose hall is proven to be unfeasible;
- iv. Comparative cost and valuation assessment of the options;
- v. Review of building management and operation options – defining the role of the local community, the Councils and other public sector agencies; and
- vi. Funding appraisal – the options.

6.16 New Purpose Built Facility: the brief for the alternative option will require to include the following:

- Identification and option appraisal of the potential locations, with those held in public sector ownership being given a greater weighting in the appraisal – such an option could be the Kilkenny County Council lands at the pitch and put
- An option appraisal of the range of facilities that are required and should be incorporated in the project
- Specification of the project
- Costing and valuation assessment
- Funding appraisal – the options.

Step Three: Business Planning

6.17 The Community Facilities and Amenities Action Group will need to bring the information on the three projects together for the Advisory Forum in an Outline Business Plan. This should incorporate the following range of information, with that on the Parish Hall/its alternative derived from the comparative feasibility study:

- i. **Capital Costs:** what are the construction costs associated with the projects?
- ii. **Sources of Funding:** review of potential funding sources including:
 - **Grant assistance:** the Parish Hall/its alternative and components of the local park would be eligible for capital funding under the Sports Capital Programme administered by the DoAST. However, should the project be assisted under this programme, it is unlikely that it would attract 100% grant aid. We are informed by representatives of the Department that, unless the project is in an area designated as disadvantaged, then the average grant assistance is in the order of 50% of capital costs.
 - **Development Levies:** in accordance with the provisions of 2000 Planning and

Development Act, the Councils' approved the imposition of development levies on schemes to fund infrastructure development and community projects. Considering the fact that these projects will benefit the resident population of both Graiguenamanagh and Tinnahinch, then it is recommended that both Councils consider funding these facilities regardless of which administrative area they are based in.

- iii. **Voluntary Funding & Sponsorship:** the local community, with the support of the Advisory Forum, would need to investigate the scope for raising voluntary contributions or sponsorship to assist the funding of the projects;
- iv. **Demand for the Projects:** essentially providing the basis of case for Advisory Forum support for the projects;
- v. **Sources of Current Revenue:** the opportunity to charge for use of the Parish Hall/its alternative and the formal recreational facilities in the local park/alternative locations will reflect on the access and social inclusion policies of the local community, the schools and the Councils. Revenue streams derived from use of the facilities by local schools should also be appraised. This will inform whether the facilities will require ongoing current revenue funding and, if so, the sources of this would have to be appraised and agreed;
- vi. **Operational Costs:** these are costs associated with personnel, energy, maintenance and insurance;
- vii. **Marketing & Promotional Strategy:** targeting local residents through advocating community participation and activity along with healthy living;
- viii. **Profit & Loss:** figures would have to be prepared based on income, expenditure, loan repayments etc; and
- ix. **Operational Plan:** a clear operational plan would have to be agreed with the community with commitment of support from the Councils, the schools and other bodies as appropriate.

Step Four: Implementation

6.18 The Community Facilities and Amenities Action Group, following approval from the Advisory Forum, would be tasked with implementation and delivery of the projects. Key actions would include:

- Raising the funding
- Seeking the relevant planning permissions and other necessary consents
- Procuring the relevant works contracts.

Step Five: Ongoing Maintenance & Management

- 6.19 It will be important to ensure that the projects are maintained and managed and that the role and responsibilities of the different stakeholders – the public agencies and volunteers in the local community – are clear and the ongoing revenue funding is in place.

7 PROMOTING ENTERPRISE & ECONOMIC DEVELOPMENT

7.1 Prior to the establishment of the County Development Boards, agencies worked together on an ad hoc basis, usually when a specific initiative was being implemented or in response to a sudden economic shock such as the announcement of major job losses in Castlecomer. In addition, area based initiatives such as RAPID or CALR are designed to provide a catalyst for the development of certain specified areas. The Town does not benefit from such interventions. This is due to a number of factors such as:

- i. The level of urban deprivation does not meet the requirements of RAPID;
- ii. The Town is not located in areas experiencing ongoing rural decline; and
- iii. There have been no profile job losses announced in the Town. This is not necessarily because the jobs are more secure but more due to the fact that there is no large scale business in the area.

7.2 The commissioning of the study by both Councils is a response to the lack of available interventions through these traditional sources. The findings of the study clearly indicate that there needs to be a specific initiative fostered and supported by the Councils to enable the following to be redressed:

- The economic growth of Graiguenamanagh/Tinnahinch and their surrounding area lagged that of the South East Region and the State
- There are fewer education, training and employment opportunities for the local residents
- The Town's economic health and viability is continuing to be eroded due to the limited capital investment in the area.

7.3 To achieve the range of initiatives needed, a multi-faceted approach to the economic development and regeneration of the Town requires to be adopted and, in respect of the promotion of enterprise and economic development, the key objective should be to secure a more co-ordinated and focused response by development agencies regarding:

- i. The delivery of the supports to existing and potentially new businesses;
- ii. Ensuring that there is comprehensive awareness of what supports are available; and
- iii. Ensuring that there is comprehensive awareness of the assistance that can be made available to business to access these supports.

7.4 It will be the remit of the Enterprise and Economic Development Action Group to ensure that this co-ordination is achieved and the objective is delivered through the

following mechanisms:

- Programme of Support Promotion
- Business Training
- Advocate Investment
- Continuously Improving Telecommunications Services.

PROGRAMME OF SUPPORT PROMOTION

- 7.5 Building on this study, a range of commercial opportunities should be identified and appraised by the development agencies, such as the County Enterprise Boards and LEADER. Once this is completed, the development agencies would be in a position to advocate these opportunities and promote the enterprise supports that are available to them. It should be delivered on an outreach basis, implementing a targeted campaign to local businesses and residents of the area.

BUSINESS TRAINING

- 7.6 The development agencies need to ensure that there is sufficient funding 'ring-fenced' to implement a business training programme for the Town and its catchment area. The objective of this training should be to help businesses to fully realise the commercial opportunities/potential that will emerge following the implementation of the recommendations of the study. The exact nature of the training programme required will need to be determined through a training needs assessment. However, we would envisage that it would address at least the following:
- i. Improving marketing of the range of products and services available in the Town;
 - ii. Consolidation of the marketing efforts of producers of local produce in the area under one brand; and
 - iii. How value can be added to visitor accommodation – and hence demand increased – by enhancing the range of services and facilities available, such as providing drying facilities and transfers to walkers

ADVOCATE INVESTMENT

- 7.7 The Town does not have the profile and economic infrastructure of nearby centres, such as Borris or Bagenalstown, and improvement in its economic competitiveness and attraction is constrained by poor access and infrastructure and the small population base of the Town. Until some or all of these constraints are removed

then it is unrealistic to conclude that the Town would attract any major indigenous Irish investment or FDI. There is a need, however, to ensure that they are credibly on the agenda for lesser scale investment opportunities and enterprise growth and this requires the necessary mechanisms to be put in place by the development agencies that are on the Enterprise and Economic Development Action Group. These mechanisms could include:

- More profile marketing of existing opportunities
- The delivery of serviced sites for small and medium sized businesses – supply creating demand and potential
- Business and enterprise workshops for existing businesses and landowners which examine the potential opportunities that prevail
- Provision of assistance and expertise to facilitate land assembly
- Selling the Town as a location for business with special emphasis on tourism potential.

7.8 It has been recognised that the Town is not one of the key priorities in the NSS or SERPG but the approach recommended is consistent with the aims and objectives of these strategic spatial frameworks as well as those of the statutory development plans and other adopted county and local strategies. There is, therefore, national, regional and local policy support which enables the testing of a degree of positive discrimination to help launch the Town as a location for new business, investment and enterprise growth. The Enterprise and Economic Development Action Group will need to commit to adopting and facilitating this approach if change in the economic fortunes and attraction of the Town is to be achieved.

CONTINUOUSLY IMPROVING TELECOMMUNICATIONS SERVICES

7.9 The introduction of broadband services in February 2006 is an important boost to the Town and its catchment area as it provides the telecommunications infrastructure which can help improve the range and effectiveness of the economic activities that is or can be conducted in the area. With the infrastructure in place, the opportunity is there to lobby other telecommunications companies to also provide services in the Town, hence enhancing the competitiveness of telecommunications services in the area. Additionally, the telecommunications industry is a very dynamic sector and it will be important to ensure that services keep pace with changing technology.

8 HARNESSING TOURISM POTENTIAL

- 8.1 The combination of the natural environment, the Barrow Navigation, the location of the Town at the intersection of two National Waymarked Ways and the abundance of heritage and historic sites provide a unique and relatively untapped tourism offer and potential that requires to be proactively harnessed through the Tourism Action Group. This recommendation is founded in the fact that, at present, the tourism sector, offer and potential is the only real economic strength of the Town and its catchment area. The framework for progress requires to be established through the preparation of a **Town Tourism Strategy** which comprises the following:
- i. A full **audit of the tourism offer and potential** of the Town and its immediate area;
 - ii. **Comparative assessment** of the offer against successful initiatives that have been pursued elsewhere;
 - iii. Examination of the scope and potential for **market consolidation**;
 - iv. Identification of existing and potential opportunities for **product development**;
 - v. Establishing what requires to be put in place to **maximise the effectiveness of area/product marketing**; and
 - vi. Setting out a clear **action plan and implementation strategy**.
- 8.2 The key mission of the Town Tourism Strategy would be to increase tourist/visitor numbers – both domestic and international – and spend in the area, thus enhancing the vitality of the Town and the viability of the local retailers, bars, cafes and restaurants and local tourism/guest accommodation.

AUDIT OF THE TOURISM OFFER & POTENTIAL

- 8.3 The study, through the baseline review and assessment, the consultation process and other research, has provided a high level audit of the tourism offer and potential of the Town and its immediate catchment area. This requires to be built on by the Tourism Action Group through the following actions and initiatives:
- A workshop involving all the members of the Action Group which examines the potential and opportunities that prevail and how they can be better harnessed by a more co-ordinated approach to the development and marketing of the tourism offer of the Town and the area, including how this can be better integrated into the different existing national, regional and sub-regional tourism development objectives and strategies of the different agencies. The output from the workshop should be a headline vision of what the Town and the area could achieve and the mechanisms required to put this in place and be delivered.

- The headline vision should be the subject of a local tourism sector providers workshop – both product and services providers – initiated and promoted by the Tourism Action Group. The focus of the workshop should be:
 - An introduction to the context to the workshop – realising the economic development and regeneration of the Town
 - Setting out the importance of the tourism sector in realising this objective and the contributions each will require to make in constructing detailed baseline information
 - A critical appraisal of the current offer
 - An introduction to the potential that remains to be harnessed and promoted
 - Outlining the range of supports and assistance that can be tapped into collectively and by individual businesses
 - Promotion of the importance of working together and setting out the framework by which this can be best achieved
 - Gaining the commitment in principle of all interests to contributing to the preparation of the strategy and working together in partnership to achieve its recommended outcomes.
- A survey of local businesses involved in the tourism sector to gain detailed information on:
 - The current offer and business potential – plans in the pipeline for investment and development
 - Market demand and trends – visitor numbers and expenditure profiles
 - Current marketing activity and media used, linkages to wider collaborative marketing networks and the actual or perceived effectiveness of individual or collaborative initiatives and investment
 - Perceptions on the current and future potential of the tourism sector in the area and what requires to be done to maximise potential.
- A detailed review of the wider tourism offer of the sub-region and the existing and potential linkages that prevail.

COMPARATIVE ASSESSMENT

- 8.4 Many lessons in terms of how the tourism offer and product of the Town and the catchment area can be developed and promoted can be derived from exemplars from comparable areas around the country and internationally. A set of case studies of accepted best practise requires to be agreed and the appropriateness of these lessons considered in the local context. The review should be structured by an

agreed pro forma to ensure consistency in the information sought and the information provided. The assessment should be undertaken by a combination of deriving information from websites and telephone interviews with key personnel managing the different initiatives.

MARKET CONSOLIDATION

- 8.5 The tourism offer and potential of the Town and its immediate area should not be taken to sit in isolation to the wider local/sub-regional tourism offer and potential. There are considerable scope and benefits that can be derived from all the constituent parts of a wider partnership approach working together and if appropriate determining a 'brand' that is area or experience specific – **market consolidation**. This requires to be fully explored in the preparation of the Town Tourism Strategy with the important actual and potential linked assets/attractions being:
- i. The proximity of the Town to the internationally and nationally important tourist destination of Kilkenny City and to a lesser extent at present Carlow Town;
 - ii. The attractions in Borris and St Mullins are complementary with those offered in the Town;
 - iii. The importance of the River Barrow as a national and regional water-based tourism attraction and the programmed investment of Waterways Ireland and the public, private and voluntary sectors;
 - iv. The location of the Town at the intersection of two nationally recognised Waymarked Ways and how this can be further developed and promoted more effectively;
 - v. Effective translation and promotion of the unique heritage story of the area; and
 - vi. Effective translation and promotion of the important natural environment of the area.
- 8.6 The outcome of the review and assessment should be a framework for an integrated marketing campaign promoting the walking, waterway, heritage and natural environment (SAC) of the local and wider area with the objective of developing and promoting **Graiguenamanagh/Tinnahinch as a tourism hub** for the area including Borris and St. Mullins, with linkages to Carlow Town, Kilkenny City and New Ross.

PRODUCT DEVELOPMENT

- 8.7 The preparation of the Town Tourism Strategy should focus on the identification of existing and potential opportunities for **product development**. The baseline review and assessment identifies a host of potential opportunities but to generate

profile and secure early benefits, it is recommended that the Tourism Action Group focus on the following key assets/products:

- Duiske Abbey and the Town's heritage
- The River Barrow's profile role as a key inland waterway
- The location of the Town at the intersection of two National Waymarked Ways.

Duiske Abbey and the Towns' Heritage

8.8 Duiske Abbey is already an important domestic and international visitor attraction, although actual visitor numbers are not recorded. Additionally, the further development of Duiske Abbey as a major tourist attraction is a stated objective of the Councils. In respect of how the potential of this asset can be maximised to the benefit of the economic development and growth of the Town requires to be an important focus in the preparation of the Town Tourism Strategy. It also needs to be set within the context of the importance and potential of the following:

- i. The other heritage assets of the Town and their importance and the wider context of the overall offer of the two counties/the sub-region;
- ii. The considerable scope for the tourism offer of these assets to be significantly improved on, founded on experience from comparable iconic heritage buildings and sites, without undermining the importance and integrity of the asset; and
- iii. Important tools and mechanisms should include interactive displays and 'experiences' which to date have not been embraced as well as they could in Ireland.

8.9 As a starting point, a **feasibility study** appraising the potential of Duiske Abbey will need to be prepared. This would need to be led and ultimately funded by the OPW working closely with the Tourism Action Group, the Councils, the Monuments Service, Fáilte Ireland, the Heritage Council, the DoAST and the DoEHLG. The study should consider the following, although a full brief will require to be prepared and agreed:

- The potential visitor numbers and actions needed to build this demand.
- The potential income streams such visitor entry fees, café, restaurant and gift shop income.
- The potential to attract an operator for any café, restaurant or gift shop.
- The nature of the interpretive display and the tour with the Abbey having the potential to be a hub for the heritage sites in the area as it is centrally located between Borris and St. Mullins.
- The capital and revenue costs associated with improving the Abbey's visitor attraction.

- The need for ongoing revenue funding. The justification for this funding may be based on an economic impact assessment that would appraise the number of jobs and additional visitor spend in the area due to the improved facilities.
- The potential scale of the project and any need for lands adjacent to the Abbey to be included in the enhancement scheme.

Capacity of the Waterways Infrastructure

- 8.10 While some traffic is reported at the waterways lock at Graiguenamanagh, there is scope for this to be increased. The Barrow River – Grand Canal Navigation offers an alternative to the Shannon Navigation to those seeking to enjoy the inland waterway experience. In addition, the Town is located within two hours travel distance from key urban centres such as Dublin, Cork, Limerick and Waterford and at the heart of the country thus providing good proximity to the domestic tourist market. Given the exiting range of bars and restaurants, along with the heritage and natural features that are in the Town and the surrounding area, it should already present an attractive stopping location.
- 8.11 Waterways Ireland has already invested in additional berths at the Town and these have attracted an increase in boats berthed on the river. In addition, we understand that the agency intends to develop the dry dock facilities at Graiguenamanagh. Based on current demand for berths, which has been driven by supply, there appears to be market potential for further berths. This view was verified by Waterways Ireland. In terms of harnessing the asset and potential of the waterway, there is a need for a three pronged approach which addresses the following:
- i. Improving the infrastructure;
 - ii. Promoting the opportunity; and
 - iii. Marketing the product.

Improving the Infrastructure

- 8.12 The further development of the waterways infrastructure should be undertaken on a phased basis to ensure that the infrastructure meets demand. Working with Waterways Ireland and LEADER/local development agencies, the Tourism Action Group should investigate the potential to develop additional tie up/marina facilities at the Town. The appraisal should consider the following:
- Scale of the facility
 - Ancillary services

- Linkages to the Town
- Costs
- Potential sources of revenue.

Promoting the Opportunity

8.13 The opportunity to develop waterways holidays should be promoted to potential operators. The Tourism Action Group should discuss the most appropriate means and media by which this should be achieved with Waterways Ireland as the work of the agency should not be duplicated or undermined. It is anticipated that Waterways Ireland would be an important member of the Tourism Action Group. In addition, the potential of the Town should be enhanced by it being looked at in the context of the whole River Barrow – Grand Canal Navigation and to achieve this there will require to be more co-ordinated cooperation between the following:

- i. Local authorities along the waterway/navigation: Dublin City Council and Carlow, Kilkenny, Kildare and South Dublin County Councils; and
- ii. Barrow Shore Narrow, Carlow, Kildare and Rural Dublin LEADER companies.

Marketing the Product

8.14 There is infrastructure in place and this and the supporting tourism infrastructure requires to be marketed now, in advance of developing any further berths or introducing operators to the area. Again, the Tourism Group will require to work with Waterways Ireland in developing the appropriate response.

Walking Infrastructure

8.15 Studies conducted by the Irish Sports Council in 2002 identified that walking is the main recreational activity in Ireland. In addition, according to 2003 Fáilte Ireland statistics, of all tourist activities i.e. golf, angling, cycling, equestrian etc., walking is among the most popular. Furthermore, walking tourists will spend more on accommodation, travel and sightseeing and the same amount on shopping than average tourists. The combination of the Barrow Waymarked Way and the South Leinster Waymarked Way provides an important range of quality walking routes in the local area. As the two routes intersect at the Town then there is considerable scope for the promotion and development of the commercial opportunities that can be spawned from walking tourism to be captured by Graiguenamanagh/Tinnahinch.

8.16 Of value to this study is work that DTZ Piedad Consulting completed on walking in

the West of Ireland. The study assessed the potential to improve commercial opportunities of walking infrastructure. It found that commercial opportunities and benefits can be achieved by the tourism product providers working together to promote the area. In addition, it was also found that there is scope for product providers to add value to their offer by, for example, providing drying and laundry facilities, guides and transfers. The final report was launched as a 'step-by-step' guide by the Minister of Tourism in July 2005 and it is anticipated that it will be rolled out around the country. Taking the findings and recommendations of the study and applying them to the Barrow and South Leinster Waymarked Ways, the economic impacts of walking tourism can be enhanced and further grown by pursuing the following:

- Funding for route maintenance be mainstreamed or allowed for in the annual revenue expenditure of the Councils. This approach ensures the quality of maintenance of the routes is sustained and not dependent on the work of voluntary teams which is well intentioned but ad hoc.
- A partnership approach is adopted to the promotion of the walking routes. This should be led by the public sector, with involvement of local communities, local tourism committees, the Councils, tour operators etc. The Barrow Navigation Tourism Partnership would represent an appropriate platform for this partnership approach.
- The routes are developed to attract shorter walks by including loops or spurs off the walkways. This reflects the fact that the majority of walkers are day trippers who enjoy half day walks and that international tourists are staying in Ireland for shorter visits.
- Accommodation and other tourist product providers should be trained to target walkers and add value to their product, for example by providing transfers to the next points on the route, drying and laundry facilities, packed lunches.
- The concept of the Town as a 'walking tourism hub' should be promoted to walkers directly or through walking tour operators. This role could be enhanced by the provision of a number of facilities such as transfers and transport, drying facilities and shelters for walkers.
- Walking festivals could be added to the events calendar of the Town and would serve to bring in more people to the locality.

8.17 The key partners needed to initiate this programme of walking development would be the Councils, the National Waymarked Ways Advisory Committee, the local communities, local tourism product providers and committees, Fáilte Ireland and LEADER/National Rural Development Companies in the area. The co-ordination of bringing all these parties together and the launch of the initiative should be undertaken by the Tourism Action Group.

9 COMMERCIAL SERVICE CENTRE FOR THE AREA

- 9.1 The theme that emerges from the assessment of tourism potential is that of the Town developing and promoting its role as a 'tourism hub' for the wider local area, for both waterways and walking tourism. To enhance this potential, there is a need for the Town to improve and develop the commercial services/infrastructure in order that it becomes the '**commercial service centre or hub**' within the local area across all aspects of the tourism economy.
- 9.2 The baseline review and assessment has indicated that in recent years the Town has benefited from investment and, as a consequence, the level and quality of shops, restaurants, cafés, bars and tourist accommodation has improved. Looking to other successful tourism and commercial services hubs around the country across the settlement hierarchy, for the role to be unequivocally established then the critical mass of supporting tourism and commercial services infrastructure needs to be further enhanced. This can be market driven with little intervention by the Regeneration Action Group but it will take a longer time. It is recommended that the challenge is embraced and the initiative nurtured by the Regeneration Action Group.
- 9.3 In respect of what this Action Group should or could do to help nurture an increase in tourism/commercial services infrastructure, a key issue identified from the TRS review and the consultations was that the optimum level of regeneration of land and buildings was hampered by the uncertainties associated with site ownership. It is an issue that requires to be redressed, accepting that the TRS is no longer available for projects that have not got planning consent. The Action Group's role and responsibilities requires to be the following, each of which are elaborated on in the paragraphs that follow:
- i. Assisting owners that have planning consent or applied for planning consent prior to 31 December 2004;
 - ii. Establishing the facts in respect of landownership;
 - iii. Assisting securing the development and regeneration of opportunity sites; and
 - iv. Promoting and realising an environment for investment.

ASSISTING OWNERS

- 9.4 Ten planning applications for TRS designated sites were lodged with the Councils and, as such, qualify under the scheme for tax incentives for investment and development. The baseline review and assessment highlights that only two sites have to date been developed and the others are not advancing either because they failed to obtain planning permission or the project promoter has decided not to

proceed. The representatives of the Regeneration Action Group should to set up meetings with each of the applicants to enable a detailed review of the current position and how the Action Group can assist owners in proceeding with the projects. This assistance could include:

- Project and market feasibility advice
- Design advice
- Investment and funding advice
- Project management advice.

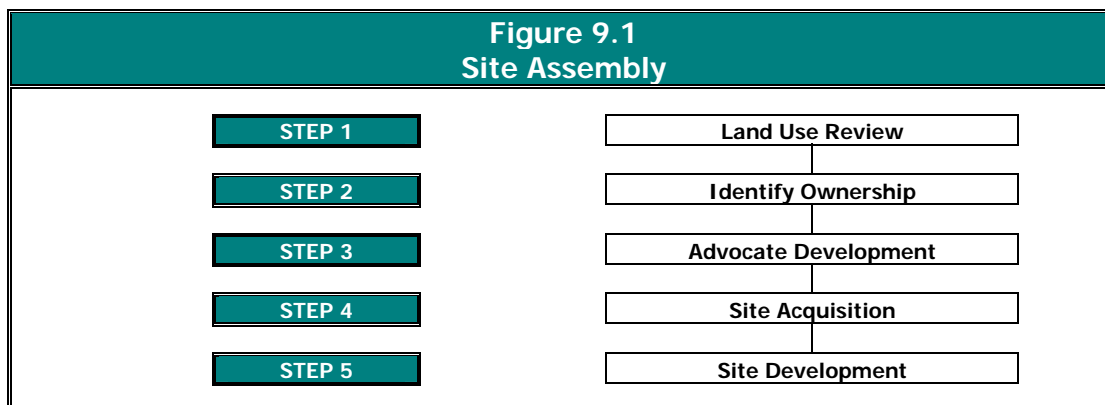
The fact that there are designated TRS sites which have the potential for being live projects is important to the economy of the Town and streetscapes in terms of the objectives of the study and the Regeneration Action Group requires to be proactive in maximising any potential for delivery that prevails.

RESOLVING LAND OWNERSHIP ISSUES

- 9.5 Through the Regeneration Action Group, resources – most likely from the Councils – require to be allocated to addressing the issue of uncertainty regarding land ownership information. While this should be the responsibility of individual owners, the study has illustrated that the complexities involved are largely beyond the scope and capabilities of local landowners. If the issue is not resolved then the full potential of the economic development and regeneration of the Town will not be achieved and the derelict lands and buildings could dissuade other investment. With resolution of ownership information, representatives of the Action Group will require to provide the assistance listed above in helping to bring land and property forward. The outcome may be that there is a need for the Councils to acquire the land and properties which will have not only financial implications but could be taken as a precedent other villages and towns will seek. These implications will need to be reviewed by the Councils in terms of how far they can or wish to proceed.

DEVELOPING OPPORTUNITY SITES

- 9.6 The majority of the opportunity sites identified in the study are under private ownership or in some instances ownership of title is not clear. These are sites that are important to the short, medium and long term economic development and regeneration of the Town. Therefore, the Regeneration Action Group/the Councils will have to play a strong advocacy role and in certain circumstances a leading role in site assembly but the private sector, working with the Action Group/the Councils, will also have to play a central role in site assembly, as ultimately it is this sector that will benefit the most. Figure 9.1 outlines the steps required to progress site assembly and development.



Step One: Land Use Review

- 9.7 This study has reviewed the land use policies and identified a range of opportunity sites within the Town. Building on the findings of this report, a more detailed land use review is required. This would focus on each site in more detail and address uses, zonings, landownership, transportation, land use strategy and phasing. The review should also identify property values and risks associated with the development of the sites. The output of this review would serve to provide a short, medium and long term phased work programme for all selected sites. It should be co-ordinated by the Regeneration Action Group. As a starting point, a number of development opportunity sites in Graiguenamanagh and Tinnahinch have been identified as follows:

Graiguenamanagh

- i. **Duiske Abby Remains and The Quay:** an overview of the opportunity to develop this site as a tourism product is set out in Section 8;
- ii. **Turf Market:** is located to the south west of the Main Street. It comprises six sites with a total area of 2,115m². From consultations, we understand that there may be problems establishing landownership titles for these properties. The land is zoned for a mix of uses including; residential, retail, office and industrial;
- iii. **East High Street:** three sites at East High Street make up a total area of 3,700m². The majority of the structures were used for industrial or storage use and some are being used for residential purposes. Part of the area is occupied by Cusendale Woollen Mills, one of the main employers in the Town. The land is zoned for general business use;
- iv. **North West Main Street:** this site covers an area of 2,336m² and is zoned for general business use; and
- v. **Kilkenny County Council owns a 2.8ha site at the south west of Graiguenamanagh.** The potential of this site is considered in more detail in Section 10.

Tinnahinch

- 9.8 In Tinnahinch, a number of structures along the Quay, to the west of the bridge, are in poor condition and would benefit from restoration and renewal and in some cases complete redevelopment. These sites have frontage onto the Barrow, with Tinnahinch Castle serving as an impressive backdrop. In addition, there is an opportunity site to the east of the Tinnahinch that looks across the river to the Quay in Graiguenamanagh. Considering the close proximity of this site to the river, the technical feasibility of its development potential needs to be assessed.

Step Two: Identify Ownership

- 9.9 Prior to any investment or project development, the Regeneration Action Group/the Councils will need to identify site ownership. In the first instance, this could involve a land title search of all the opportunity sites.

Step Three: Advocate Development

- 9.10 Where landowners are identified, the Regeneration Action Group/the Councils – again as appropriate – could advocate the development of the site with the landowner. This would be set in the context of the land use strategy prepared in Step One which will have clearly identified the market opportunity and phasing strategy for development of the sites, ensuring that realistic and viable development strategies are presented to the landowners. It is recommended that the Action Group/the Councils should firstly target the landowners directly, ensuring that they are fully aware of the development opportunities.

Step Four: Site Acquisition

- 9.11 Where the private sector is unwilling to take the lead, on the advice of the Regeneration Action Group, the Councils should consider using their Compulsory Purchase Order (CPO) powers to accede the land or property, particularly where landownership is in dispute or in the case of a derelict site. By adopting this approach, the Action Group/the Councils would be able to open up a number of development opportunities and provide the brief for the most appropriate site specific development strategy.

Step Five: Site Development

- 9.12 Following market failure – that is the owners choose not to proceed alone or even

within a development agreement with the appropriate public sector partner – a decision will require to be taken on whether the public sector develops the site and what is the most appropriate public sector body to take on the role and the responsibility. The assessment of this will be undertaken by the Regeneration Action Group and advice/recommendations provided to the Partnership Steering Group. The assessment will comprise a cost benefit analysis (CBA) founded on a land use option appraisal which evaluates the costs to the public sector, including site acquisition, administrative and finance costs, against the potential benefits such as the post development value of the site over time and the direct, indirect and induced economic benefits set against additionality and displacement considerations. Public sector intervention should provide the catalyst for private sector investment and assist in achieving the necessary critical mass of tourism/commercial services infrastructure and residential development to help realise the economic development and regeneration objectives set for the Town.

PROMOTING & REALISING AN ENVIRONMENT FOR INVESTMENT

9.13 The heritage and waterfront environment and asset of the Town is well acknowledged but, as yet, not realised to its full potential. They are critical and unique building blocks in the creation of an environment which will encourage the necessary public and private sector investment to secure the long term and sustainable economic development and regeneration of Graiguenamanagh/Tinnahinch. To this end, the following agenda has been identified as the actions that require to be proactively pursued:

- Preparing an **environmental improvement strategy** for the Town that incorporates hard and soft landscaping, commercial frontage renewal and urban design/conservation which embraces the unique heritage and waterfront assets of Graiguenamanagh/Tinnahinch – integral to this would be the preparation of an **Architectural Conservation Plan** for the Town
- Preparing a **heritage and interpretation strategy** that captures and tells the story of the key attractions and the tourism offer of the Town
- Developing a **theme/brand** for the Town which distinguishes it within the sub-region, nationally and internationally – this would include evolving a logo/strap line that evokes the unique characteristics of the Town and its catchment area/hinterland
- Preparing a **marketing strategy** that tells the Town's story, the opportunities that prevail and the support that is available to assist market interest being translated into investment.

10 DELIVERING THE CATALYST OF COUNCIL OWNED LANDS

10.1 As has been previously highlighted, Kilkenny County Council (the Council) owns a 2.8ha site to the south west of Graiguenamanagh Town Centre which is identified as a key asset in terms of providing a flagship catalyst that can help realise the economic development and regeneration objectives of the study. The importance of the lands and their potential are well reflected in the fact that they have been given a separate section in the report. In response, this section presents a development strategy for the site which is structured by the following:

- i. Identifying the optimum mixed use strategy for the lands;
- ii. Reviewing current land use objectives and zonings in respect of the preferred development strategy;
- iii. Appraising the options/delivery mechanisms for implementing the preferred development option; and
- iv. Setting out the steps required to advance the initiative.

IDENTIFYING THE OPTIMUM MIXED USE STRATEGY

10.2 The site extends to the River Barrow to the south and adjoins Duiske College to the north east. A new housing scheme has just been completed to the north east and to the east of the site are open fields. Subject to technical and environmental assessments, the subject lands could provide an opportunity to enhance the quality of life of local residents, enhance the tourism attraction/infrastructure of the Town and provide a catalyst to attract further private sector investment. The site represents a development opportunity for both the public and private sectors and this is examined and developed further in the paragraphs that follow.

Public Sector

10.3 Importantly, the site could accommodate the range of community and tourism infrastructure required in the Town, for example:

- The location of the site adjacent to the river yields an opportunity to develop additional berthing facilities, with space to provide services such as potable water, changing rooms, etc. which could also be used as a facility for walkers
- It could be the alternative location for a purpose built multi-purpose indoor community and recreational facility, with the design of the building providing an iconic structure which on its own attracts both local people and visitors
- Both formal and informal recreation – river walkways and a formal park/focus for the

Town.

Private Sector

- 10.4 Located on the waterfront, the site could also represent an attractive development opportunity for a potential mix of private sector investments including:
- i. A small but high profile housing scheme;
 - ii. A limited number of retail units;
 - iii. Other local services such as cafes and restaurants; and
 - iv. A small/discrete retirement village.

The Requirements & Outputs

- 10.5 All of the development options should to be examined through a detailed market potential and feasibility study commissioned by the Advisory Forum through the Regeneration Action Group – with appropriate inputs from other Action Groups – and the end outputs being the preparation of a deliverable masterplan for the site.

REVIEW OF CURRENT LAND USE OBJECTIVES & ZONINGS

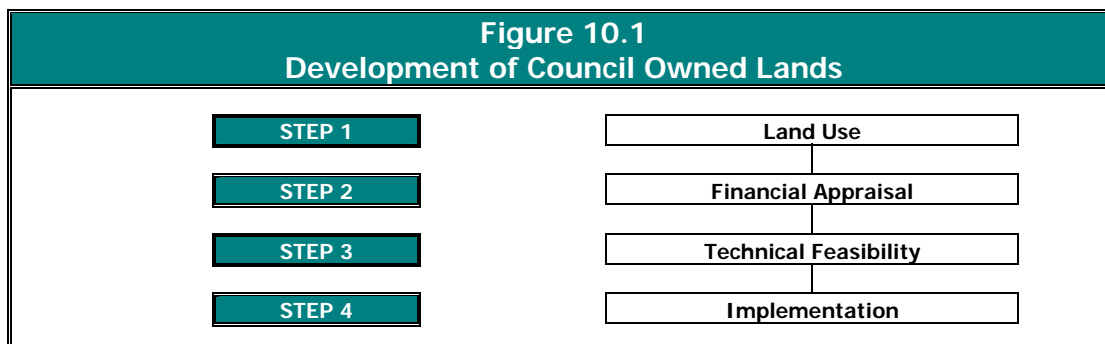
- 10.6 In the Kilkenny Development Plan Volume II, 2002 (the Development Plan) the site is currently zoned '**Open Space**'. Permissible uses under this zoning are open space, sports clubs, recreational buildings, stands, pavilions, agriculture uses and public service installations. This zoning does not capture the full potential of the site and embrace the more comprehensive mixed use strategy that could be viable and in the best interests of the site maximising its potential as a catalyst for the sustainable economic development and regeneration of the Town. To maximise on the asset, consideration should be given to a specific and special zoning for the site that embraces the foregoing but also the following:
- The zoning should incorporate '**Residential**'. Permissible uses under a residential zoning are dwellings, open spaces, places of worship, community centres, halting sites, public service installations, playgroup or crèche and nursing home uses. Other uses that would be '**Open for Consideration**' would include: retail; tourist accommodation; public house; restaurant; and, local neighbourhood services.
 - In the development of any part of the site which is located within the SAC, particular attention should be focused on the material effect, if any, that the proposed development would be likely to have on the character of the Architectural Conservation Area, as outlined in Section 82 (2) of the 2000 Planning and Development Act.

APPRAISING THE OPTIONS/DELIVERY MECHANISMS

- 10.7 A requirement of the brief is to provide a high level assessment of the potential to deliver the development of the site using the Public Private Partnership (PPP) mechanism. A PPP is an arrangement between the public and the private sector to deliver a service traditionally provided by the public sector. We used guidance notes provided by the DoEHLG and the Department of Finance (DoF), along with our professional experience, to evaluate the potential to deliver the development of the site using the PPP approach.
- 10.8 As highlighted above, the development of the site could include both private and public sector components. However, this does not necessarily mean that the scheme can be developed using the PPP approach. There are a number of factors and influences which determine whether there is potential or not. **Founded on our high level assessment, we would conclude that the site should be developed using traditional procurement with the private sector components potentially cross-subsidising the public sector elements. As such, it should be developed as a 'quasi-PPP' as distinct to a full PPP.** The reasons for this recommendation are:
- i. Because of its complexity, the procurement process for a PPP is typically more expensive to the public sector than that using a more traditional procurement approach;
 - ii. Therefore, to represent value for money to the public sector, a PPP project needs to be of scale to ensure that these additional costs can be absorbed in the value of the scheme. While the full detail of the scheme has yet to be determined, it is unlikely to be of sufficient critical mass to achieve this; and
 - iii. The requirements of the PPP procurement process is found to make it more expensive for bidders to prepare their submissions. Again, although the full detail of the project is yet to be determined, it is unlikely that it would be of scale/represent sufficient value for money to attract significant market interest in any expensive PPP process.

SETTING OUT THE STEPS REQUIRED TO ADVANCE THE INITIATIVE

- 10.9 Figure 10.1 presents the steps required to advance the initiative/project.



Step One: Land Use

- 10.10 A masterplan detailing the optimum location and scale of the defined range of uses that have been identified through the market assessment should be prepared by the Regeneration Action Group/the Council. Given the current context and townscape, it is envisaged that this would be a low density scheme and that the design and layout would be sympathetic to the heritage townscape of the Town and the natural environment of the surrounding area. The masterplan should also identify a phasing strategy for the development of the site. The phasing strategy could prioritise the provision of the community facilities in the short to medium term up to 2011. Delivery of private sector components – retail, residential, commercial leisure etc. – would be subject to market demand and may require a longer term development programme but not if the initiative kicks off. Following preparation of the masterplan, the Council will require to incorporate a variation of the Development Plan to accommodate a wholly mixed use strategy approach to the development and delivery of the site. It is recommended that this is a zoning which is specific to the site with the approach reflecting the unique importance of the site in the future economic development and regeneration strategy of the Town.

Step Two: Financial Appraisal

- 10.11 Once the mix and scale of development is defined, a financial appraisal matching costs of the public sector components against the values of the private sector elements should be prepared. This appraisal would identify the scope to generate income from the post-development values that the site would yield to cross-subsidise the public sector components of the scheme and mechanisms to achieve this, ie. site disposal following rezoning etc. The financial appraisal should include consideration of the implications of attracting grant aid for the development of the community facilities.

Step Three: Technical Feasibility

10.12 Prior to proceeding, the technical and financial feasibility of the scheme would need to be appraised. This would integrate the assessment of the potential of the berthing facilities, the community facilities and potential private sector components as highlighted above. In addition, the assessment would need to consider traffic and other potential environmental impacts of the delivery of the scheme.

Step Four: Implementation

10.13 To progress implementation of the masterplan and project, there are a number of factors, influences and actions which require to be considered and addressed. These are:

- Clarification of the **project promoter**: the suite of public projects that emerge could be delivered by a mix of the Council, Duikse College, Waterways Ireland or the local community under the remits of the different Action Groups – and ultimately the Partnership Steering Group. Who could be responsible for what will only become clear when the detail of the mix is determined. Noting this, given that it is Council owned land then it is recommended that Kilkenny County Council, with the support of the other partners, plays the central role in assisting the delivery the public sector facilities to ensure that proper co-ordination mechanisms are in place.
- Procuring the public sector components using **traditional procurement**, funded by the programmes and contribution mechanisms which have been identified along with cross-subsidy from realising the post development value of the site. What this comprises will not become clear until the nature of the different components is determined.
- It is assumed, based on our assessment of the potential and attraction of the site, that part of the development equation will be private sector driven. This requires to be confirmed by the detailed market assessment which will also identify the range and nature of the potential private sector components of the masterplan. This information will provide the framework for establishing what the most appropriate **disposal strategy** is for the private sector development parts of the site. At this stage, without the detailed market and masterplan information, what this is or the options that may be available/appropriate cannot be prescribed.

11 CONCLUSIONS & RECOMMENDATIONS

11.1 This section presents the key findings, conclusions and recommendations of the study. These are set out under the following headings:

- i. Current Challenges;
- ii. Building on Strengths; and
- iii. Recommended Interventions/Incentives.

CURRENT CHALLENGES

11.2 The key challenges facing Graiguenamanagh/Tinnahinch realising the sustainable economic development and regeneration of the Town are summarised under:

- Population & Critical Mass
- Social Class & Education
- Infrastructure Constraints
- Lack of Investment
- Future Role & Growth.

11.3 **Population & Critical Mass:** the Town and its catchment area have a relatively small population. Based on the preliminary results of the 2006 Census, the population of the Town is found to be declining. This is in contrast to the picture for 1996 – 2002 which indicated it was growing, albeit at a level well below that at the national, regional and county levels over the same period. In contrast to the Town's performance over this earlier period, where it was found to be growing at a faster rate than other comparable and nearby towns in the two counties, the 2006 Census indicates that it has fallen behind these towns in terms of population growth. Although the numerical figures are low, the fact that there is population decline is important given the wider picture of growth around the country. At the catchment area level, the population is increasing but the growth rate is also below that which has been witnessed nationally, regionally and at the Carlow and Kilkenny county levels. In terms of the potential for economic development and growth, the main issue is the Town establishing a critical mass of population to sustain a greater level of services and, hence, become more attractive place for living, working, leisure and investing in. An important objective of this study has been to provide the guidance on the mechanisms required to reverse the current population trends.

11.4 **Social Class & Education:** the Town is characterised by lower proportions

classified as professional or managerial/technical workers than at the national, regional or county levels and significantly less participating in third level education (6%) than the State (23%). The issues are underpinned by the rural nature of the economy and the comparatively weak employment structure which is resulting in people having to leave the area in search of higher value jobs – the challenge is attracting new businesses to the Town to help redress this.

- 11.5 Infrastructure Constraints:** the future growth of the Town is not constrained by land availability or water services and waste management capacity. Since February 2006, connection to broadband telecommunications infrastructure has also removed this as a constraint. However, there is a need to ensure that this is not solely available through one provider. Additionally, in the interests of achieving increased parity and competitiveness with the more urban areas of the country, it is important that the area keeps pace with technological developments in this dynamic sector. This noted, the key infrastructural issues which continue to prevail are poor road access, public transport services and insufficient electricity supplies capacity to host a medium or large sized business – all of which undermine the potential of the Town's competitiveness. These are not issues that are unique to the Town but generally characterise similar small towns in rural parts of the country. The commissioning and objectives of the study are, however, unique and reflect the commitment of the Councils to redressing the inherent issues to enable the long term sustainable economic development and regeneration of the Town.
- 11.6 Lack of Investment:** despite the availability of tax incentives under the TRS, the Town witnessed only limited private sector investment over recent years largely due to the relatively weak property market that prevails and issues relating to uncertainty on land and buildings ownership. As a consequence, there remains a large number of poorly maintained buildings and derelict sites which impact on the Town's environment and potentially serve to undermine its attraction for both indigenous and external investment.
- 11.7 Future Role & Growth:** national, regional and local policy frameworks support the growth of the Town's importance as residential and local service centres. There has been limited residential development in recent years and this has predominantly catered for the local market. However, the commencement of the construction of a 67 unit scheme in Graiguenamanagh importantly would indicate new market confidence in the residential potential of the Town.
- 11.8** The role of the Town as a local service centre, specifically Graiguenamanagh, can be seen to be strengthening through recent larger scale residential permissions. In addition, there is real scope for this to considerably grow by building on the natural and heritage assets of the tourism offer of the Town and enabling it to evolve into the **commercial services and tourism hub** for the broader area.

BUILDING ON STRENGTHS

11.9 The key strengths of the Town include:

- i. Heritage;
- ii. Natural Amenity;
- iii. Attractions of the Surrounding Area; and
- iv. The Community.

11.10 **Heritage:** the Town is rich in heritage and highlights include:

- The 13th Century Cistercian Duiske Abbey
- The bridge joining Graiguenamanagh/Tinnahinch originally built in 1797
- Tinnahinch Castle – 1615
- Medieval streetscape and architecture of the Town.

11.11 This wealth of heritage is acknowledged by both Councils. For example, Kilkenny County Council has identified the opportunity to develop Duiske Abbey as a major tourist attraction in its County Development Plan. Additionally, both Councils have committed to the preparation of an Architecture Conservation Plan for the Town. Through consolidation, there is considerable scope to build on the wealth of heritage in the Town and this requires to be further harnessed and developed.

11.12 **Natural Amenity & Infrastructure:** the Town can also boast a wealth of natural amenities and infrastructure with key assets including:

- i. **Waterways:** the Town is located on the Barrow – Grand Canal Navigation which links it to New Ross to the south with Dublin City in the north and is a relatively untapped tourism development opportunity;
- ii. **Walkways:** the Town is a meeting point for two National Waymarked Ways – the South Leinster Way and the Barrow Way. Again, there is an opportunity to harness the economic potential that these walkways offer; and
- iii. **Special Area of Conservation:** the Town is centrally located in the River Barrow and River Nore SAC which has a recognised educational, scientific, amenity and tourism value.

11.13 **Attractions of the Surrounding Area:** the Town and countryside in the surrounding area offer a range of heritage, amenity and recreational attractions and together could form a sub regional critical mass of tourism attractions that could

support an increased number of visitor accommodation, restaurants, cafes and bars in the area. This should be further harnessed through strong linkages with the tourism offer in Carlow Town and Kilkenny City. The Town sit at the heart of this critical mass and rightly should serve as the **tourism hub** for the area.

11.14 The Community: over the years, the Town has benefited from the actions and initiatives of local people and community organisations. There is evidence to indicate that community participation in the Town is in fact strengthening as illustrated by the following:

- The success of the Graiguenamanagh 800 celebrations - Graig800
- The increasing awareness and success of the annual Graiguenamanagh Book Festival
- The preparation of a Community Action Plan in 2004
- The reinstatement of the GTAC along with the establishment of new structures to drive economic, social and cultural development.

11.15 The willingness of the community to play a key role in the economic development and regeneration of the Town was reinforced in the consultation process. This is very important as a strong community is an essential ingredient in the development of the Town and the implementation of the recommendations that have emerged from the study.

RECOMMENDED INTERVENTIONS/INCENTIVES

11.16 The baseline review and assessment and the consultation process identified a wide range of issues which require to be addressed. They also identified a suite of initiatives that should or could help secure the sustainable, social, economic and cultural development and regeneration of the Town over the short, medium and longer term. The recommended interventions required to deliver the vision and potential of Graiguenamanagh/Tinnahinch are set out under the following headings:

- i. Framework for economic development and regeneration;
- ii. Delivering community facilities and amenities;
- iii. Promoting enterprise and economic development;
- iv. Harnessing tourism potential;
- v. Establishing the role and profile of the Town as the commercial service centre for the area; and
- vi. Delivering the catalyst of Council owned lands.

Framework for Economic Development and Regeneration

11.17 This suite of actions and initiatives will not be delivered by local people working on their own or by them being solely driven by the Councils and other public sector development agencies. To achieve them will require building on the work of the GTAC, with the support/advice of both Carlow and Kilkenny County Enterprise Boards. To pursue the different themes of the economic development and regeneration framework, a number of sub-structures to the GTAC are required as follows:

- Community Facilities & Amenities Action Group
- Enterprise & Economic Development Action Group
- Tourism Action Group
- Regeneration Action Group.

11.18 From the study and its recommendations, it is reaffirmed that there is a clear need for the initiatives to be led and championed by the local community supported by relevant public sector agencies.

Delivering Community Facilities & Amenities

11.19 The economic development initiatives and supports will contribute to improving the quality of life in the Town and creating an environment that is attractive for living, working, visiting and investment. However, an enhanced quality of life will not be achieved through economic development initiatives alone. It also requires enhancement of community infrastructure and amenities – infrastructure and amenities which the Town is found to be deficient in. To help redress this issue, a range of short to medium term projects and the delivery mechanisms required to make them happen have been identified. The projects are:

- i. **A local park** – on the Council owned lands on the River Barrow in Graiguenamanagh to provide a focus for both formal and informal recreation which would harness the asset of the river. This could comprise a formal landscaped park, waterways infrastructure and other local amenities. Additionally, Kilkenny County Council is progressing plans to deliver a play area in the Town;
- ii. **Community hall** – a decision has to be taken on whether there is remodelling of the Parish Hall or if there is a need for a new purpose built facility. The study sets out the framework for the feasibility studies required to assist decision making on which is the optimum option. As illustration of the commitment to the project, Kilkenny County Council is currently assisting the local community to secure ownership of the Parish Hall; and

- iii. **Local recreational amenities** – in addition to the local park, there is a need to substantially build on the natural assets of the Town by providing recreational infrastructure such as formal paths, informal walkways, seating and picnic areas in key locations in Graiguenamanagh/Tinnahinch.

11.20 The delivery of the projects is set down in a five step programme of actions including identifying the lead agency, undertaking option appraisals and business planning through to implementation and ongoing management and maintenance. The Community Facilities and Amenities Action Group will have responsibility for co-ordinating and delivering the projects.

Promoting Enterprise & Economic Development

11.21 The study identifies the need for a more co-ordinated and focused approach to enterprise and economic development and it will be the responsibility of the Enterprise and Economic Development Action Group to ensure that this co-ordination is achieved and delivered through the following mechanisms:

- **Programme of Support Promotion:** building on this study, a range of commercial opportunities in the area should be identified and promoted by the development agencies locally.
- **Business Training:** funding requires to be 'ring-fenced' to enable a business training programme to be implemented for the Town and its catchment area but the specific training needs will require to be determined. They are likely to include marketing of products and services, consolidation of marketing efforts and how value can be added to the tourism and commercial services.
- **Advocate Investment:** the Town does not have the profile and economic infrastructure of nearby centres such as Borris or Bagenalstown and improvement in its economic competitiveness and attraction to major domestic or FDI investment is constrained by poor access, infrastructure and the small population base of the Town. There is a need, however, to ensure that they are credibly on the agenda for lesser scale investment opportunities and enterprise growth through putting in place the following:
 - More profile marketing of existing opportunities
 - Delivery of serviced sites for small and medium sized businesses – with the outcome sought being supply creating demand and potential
 - Business and enterprise workshops showing models of successful business opportunities in rural areas in Ireland and abroad
 - Provision of assistance and expertise to facilitate land assembly
 - Selling the Town as a location for business with special emphasis on tourism potential.

- **Improving Competitiveness of Telecommunication Services:** the introduction of broadband to the Town in 2006 will improve the efficiency of business operating in the Town and improve the scope for home-working in Graiguenamanagh/Tinnahinch. This could be further enhanced if there was competition amongst the telecommunications services providers in the Town. The scope to introduce competition in the telecommunications market needs to be appraised and promoted.

Harnessing Tourism Potential

11.22 Graiguenamanagh/Tinnahinch and their surrounding countryside have a unique and relatively untapped tourism offer and potential that requires to be proactively harnessed through the Tourism Action Group. The framework for progress requires to be established through the preparation of a **Town Tourism Strategy** which comprises the following:

- i. **Audit of tourism offer and potential** of the Town and its area;
- ii. **Comparative assessment** of the offer against successful initiatives that have been pursued elsewhere;
- iii. Examination of the scope and potential for **market consolidation** which takes due account of the following:
 - The proximity of the Town to the national and international tourist destination of Kilkenny City and, presently to a lesser extent, Carlow Town.
 - The attractions of Borris and St. Mullins, which are complementary to those offered in the Town
 - The importance of the River Barrow as a national water-based tourism attractions
 - The location of the Town at the intersection of two National Waymarked Ways
 - Effective translation and promotion of the unique heritage story of the area
 - Effective translation and promotion of the important natural environment of the area;
- iv. Identify existing and potential opportunities for **product development** with a focus on the following key assets/products:
 - Duiske Abbey and the Town's heritage
 - The River Barrow's profile role as a key inland waterway
 - The location of the Town at the intersection of two National Waymarked Ways;
- v. Establish what is required to maximise the **effectiveness of the area/product marketing**; and
- vi. Setting out a clear **action plan and implementation strategy**.

Establishing the Town's Role & Profile as the Commercial Service Centre for the Area

11.23 To enhance its tourism and economic potential, there is a need for the Town to develop the commercial services/infrastructure in order that it becomes a '**commercial service centre or hub**' within the local area across all aspects of the tourism economy. Based on experience from elsewhere, for the role to be unequivocally established then the critical mass of supporting tourism and commercial services infrastructure needs to be further enhanced. A key strand in the equation is the regeneration of designated TRS lands and buildings which did not occur due to market and land ownership issues. This challenge requires to be embraced by the Regeneration Action Group through the following programme of actions and initiatives:

- Assisting land owners who have planning consents that comply with the requirements of the TRS to deliver the schemes proposed for their sites
- Resolve the uncertain land ownership issues that have historically constrained investment in the Town
- Assisting securing the development and regeneration of opportunity sites
- Promoting and realising an environment for investment which should comprise preparation/launching of the following:
 - An environmental improvement strategy
 - A heritage and interpretation strategy
 - A theme/brand for the Town which distinguishes it within the sub-region, nationally and internationally
 - A marketing strategy which tells the Towns' story, the opportunities that prevail and the support that is available to assist market interest being translated into investment.

Delivering the Catalyst of Council Owned Lands

11.24 The 2.8 ha site under the ownership of Kilkenny County Council is a key asset in terms of its potential to provide a flagship catalyst that can help realise the economic development and regeneration objectives of the study and is an initiative that requires to be fully grasped by the Regeneration Action Group. To maximise the potential of the site and its economic, social and cultural value to local people and the Town's economy, a development strategy is required which examines and addresses the following:

- i. Identifying the **optimum mixed use strategy for the lands** – all of the options, both

public and private sector, require to be examined through a detailed market potential and feasibility study with the end outputs being the preparation of a deliverable masterplan for the site. Uses could include: waterways and walking infrastructure; the alternative location for a purpose built indoor community hall; a small but high profile housing scheme; a limited number of retail units; cafes and restaurants; and, a small/discrete retirement village;

- ii. **Reviewing the current land use objectives and zonings** in respect of the preferred development strategy. The current 'Open Space' zoning does not capture the full potential of the site and embrace the more comprehensive mixed use strategy that would be viable and in the best interests of the site maximising its potential. This requires to be redressed with a specific zoning being derived for the site;
- iii. **Appraising the options/delivery mechanisms** for implementing the preferred development option. It has been established that this should be through traditional procurement routes rather than the PPP mechanism supported through a mix of local and national level public sector funding; and
- iv. **Setting out the steps required** to advance the initiative – including preparation of a masterplan, securing the appropriate Development Plan zoning variation, undertaking a financial appraisal of the scheme, identifying the roles and responsibilities of the public and private sectors and the local community and progressing to procurement and implementation.